



American
Alliance of
Museums

Excellence in DEAI



Pursuing Excellence

Diversity, Equity, Accessibility, Inclusion

DEAI is integral to excellence in museum practice. FULL STOP. The pursuit of *Excellence in DEAI* marks another step in our field's decades-long commitment to build a stronger, more representative, and inclusive community for all. We want to do better. We can do better. With intentional focus we can shape museums so that they operate with equity, reflecting the breadth of diversity in our communities while ensuring that inclusion and access are priorities.

At their core, museums are dynamic community spaces for learning and connection. The responsibility to tell all of our stories is paramount—imperative to our relevance. Fostering space for each and every one of us requires intention, courage, and a commitment to the pursuit of excellence. Excellence in museums results in:

- A stronger asset to and for their community
- An organization worthy of support and public trust
- Sound stewardship of their collections
- Enhanced funding opportunities
- Improved and effective communication by staff and board
- Cultural competence and equity analysis
- The ability to integrate community leadership at pivotal moments

The work of the Excellence in DEAI Task Force and this resulting framework represent the leadership and experiences of a distinguished group of museum professionals. The task force's work and culminating report calls out DEAI as a core tenet of the standards of excellence in the museum field. The framework, both in concept and in detail, has been "road tested," with input from AAM Annual Meeting attendees, accreditation commissioners, and Facing Change Museum Communities of Learning (consisting of board members and staff leadership). The culminating framework offered here goes far and yet not far enough. We know this work is about continuous improvement. It is iterative as we move from transaction to *transformation*. This is a *pursuit to do better, to be better*.

We all come to this conversation about diversity, equity, accessibility, and inclusion from different starting points, and we each possess unique visions for success. Our individual and institutional perspectives and processes aimed at achieving excellence may vary, but **the need for progress has never been more urgent**. Amid social, political, and cultural polarization, and clear structural racism and other forms of oppression in the United States and around the world, **DEAI must be at the center of how we understand and practice excellence in our institutions**.

We are honored to have co-chaired the Excellence in DEAI Task Force in 2019 and to have you join us in our shared, critical endeavors toward excellence.



Co-Chair: Lonnie Bunch

Secretary, Smithsonian Institution
Washington, DC



Co-Chair: Elizabeth Pierce

President & CEO Cincinnati Museum Center
CEO National Underground Railroad Freedom Center Cincinnati
Cincinnati, OH

Excellence in DEAI Task Force

As a component of ***Facing Change: Advancing Museum Board Diversity & Inclusion***—an unprecedented national initiative to diversify museum boards and build inclusive museum cultures backed by the Andrew W. Mellon, Alice L. Walton, and Ford foundations—AAM assembled a task force of museum leaders with expertise and experience with the Continuum of Excellence in a range of museum disciplines and sizes. The task force was charged with developing recommendations to embed DEAI more deeply into the Alliance’s standards and excellence programs, including accreditation.

By focusing on the existing Continuum of Excellence, the task force helps museums move from awareness and commitment to assessment and training and then to implementation and accountability. The task force focused on:

- Outlining the characteristics of inclusive museums and strategies for how to best assess and measure excellence in DEAI in museums.
- Identifying core concepts and key indicators museums should keep in mind to support inclusion and equity throughout their structure, programming, culture, strategy, policy, and processes.
- Reviewing the AAM standards and excellence programs through an inclusion lens and recommending updates as needed.
- Recommending topics for ongoing education and training of museum staff, board, volunteers, and other key constituents.

“Embedded in AAM’s 2022-2025 Strategic Plan is a priority focus on continuing to be a driving force for DEAI by engaging, convening, and equipping museum trustees, leaders, and change makers with the case studies, assessments, and benchmarking resources they need to build DEAI skills and lead more equitable museums. AAM will showcase exemplary case studies of equitable and anti-racist outcomes in museum programs and operations to aid in building both deep understanding and the requisite skills to implement the changes required to achieve equitable outcomes in all aspects of museums’ structures and programming.”

Laura Lott (President and CEO)

Members of the Excellence in DEAI Task Force:*

Co-Chair: Lonnie Bunch

Secretary
Smithsonian Institution
Washington, DC

Co-Chair: Elizabeth Pierce

President & CEO Cincinnati Museum Center
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St. Paul, MN

Carole Charnow

President & CEO
Boston Children's Museum
Boston, MA

Kippen de Alba Chu (AAM Board Chair)

Chief of Staff
Fort Worth Museum of Science
and History
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Miki García

Director
ASU Art Museum
Tempe, AZ

William Harris

CEO, Space Center Houston
Houston, TX

Irene Hirano

President, U.S.-Japan Council
Former President and Founding CEO
Japanese American National Museum
Los Angeles, CA, and Washington, DC

Patricia Mooradian

President, The Henry Ford
Dearborn, MI

Victoria Ramirez

Arkansas Arts Center
Little Rock, AR

Belinda Tate

Executive Director
Kalamazoo Institute of Arts
Kalamazoo, MI

**Affiliation at the time of service
on the task force.*

How to use this report

This report, which highlights the results from AAM's Excellence in DEAI Task Force, is intended to be a starting point for spurring conversation and action that advances excellence in DEAI in the museum field.

While not an exhaustive “how-to” manual that fully addresses the unique circumstances of each museum, this report lays the groundwork that allows our field to establish a common set of **Core Concepts** and **Key Indicators** of excellence in DEAI.

Core Concepts are overarching themes of excellence in DEAI.

Key Indicators are tactical practices indicative of progress in each Core Concept.

There is no one-size-fits-all approach to DEAI work, so every museum should use these recommendations as guiding principles for excellence in DEAI rather than a prescriptive checklist. Some museums have progressed further along certain Core Concepts, while other museums have specific DEAI challenges they need to prioritize.

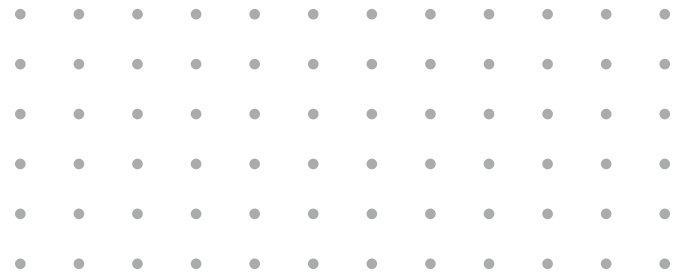
The Core Concepts and Key Indicators were developed from the task force's research, input, and outline of topics that have guided AAM's development of resources, toolkits, and training of museum leaders and change makers.

The AAM website will continue to be updated with DEAI resources specific to advancing excellence in DEAI work related to each of the Core Concepts and Key Indicators.



One of the task force's main recommendations was that DEAI should be embedded within and throughout the Continuum of Excellence rather than be a stand-alone focus area. Given that DEAI work must be a focused and intentional effort that weaves throughout different levels and departments within a museum, so too should it be throughout accreditation.

The report notes areas for further exploration within the Framework for Museum Excellence, including a stronger integration of DEAI in the AAM Code of Ethics for Museums and the Core Standards, particularly related to collections stewardship, environmental sustainability, and issues of organizational culture such as wage equity.



Part I:


Transactional to Transformational

The museum field is incredibly diverse. Thousands of museums exist across the globe—including about 35,000 in the United States alone, ranging in size from all-volunteer museums with no staff to those with over 1,000 staff members. Museum budgets can range from just a few hundred dollars to hundreds of millions annually. Museums of all types cover the spectrum of disciplines—from art museums to zoos—including historic sites and houses, history museums, science centers, children’s museums, nature centers, botanic gardens, natural history museums, and aquariums.

They are stewards of our culture, hold deep public trust, and strive to promote understanding and education. As such, our standards of excellence must center equity in museum culture, strategy, processes, policy, and practice to ensure all our communities’ voices, perspectives, and experiences are represented in the field.

In her landmark 2015 AAM Annual Meeting keynote speech, Dr. Johnnetta Betsch Cole called upon museums to “be of social value by not only inspiring but creating change around one of the most critical issues of our time—the issue of diversity.” Dr. Cole’s clarion call is a guiding statement in our work to embed DEAI in museum excellence. Museums need to embed lessons we have learned from past failures and offer inclusive and equitable paths toward a brighter future for all.

In the spring of 2017, following the creation of its strategic plan, AAM convened the Working Group on Diversity, Equity, Accessibility, and Inclusion (DEAI). Twenty museum professionals, representing a variety of disciplines, organizational sizes and types, and perspectives, came together monthly at the Alliance’s offices in Arlington, Virginia, and



once at the 2017 AAM Annual Meeting in St. Louis, Missouri. For six months, this group examined the characteristics of effective museum inclusion practices and considered what steps the field could take to promote DEAI. In those findings, it was clear that DEAI was both every museum professional's responsibility and a structural issue that needs to be addressed not just at the individual level, but the structural level as well. Shortly after publishing Insights from the Working Group, AAM formed the Excellence in DEAI Task Force to continue the momentum of that work. Over the course of 2019 the Task Force met several times and issued its preliminary results to AAM leadership in early 2020.

Now, in 2022, our world has shifted. For many throughout the museum field and beyond, the year 2020 brought with it the realization that we can no longer accept the status quo. With the murder of George Floyd and COVID-19 spreading across the country, many, unfortunately for the first time, became aware of the myriad issues related to inequity that permeate American society. From those who are just starting their learning journey to the brave individuals who have been working to guide our field to a more equitable future, there is hope because there are now many more of us who understand that the museum field must do its part. The many organizational and field-wide lessons and learnings from 2020 and 2021 have been incorporated into the task force's work where appropriate and throughout this report.

The museum field must shift away from transactional DEAI work focused on checking boxes and toward transformational institutional and collective work centered around equity and cultural and structural change.

Framing the Issues that Matter

A main focus of DEAI for many institutions is expanding representation of diversity (racial/ethnic, gender, sexual orientation, ability, etc.) throughout all levels of the museum. Having goals related to achieving more diversity is critical; however, such goals in and of themselves are not the ultimate work around DEAI. Representation absolutely matters, and having a clear plan of action to execute on diversity is imperative, but it's also important to create more equitable outcomes and build inclusive environments for all.

Moving from Awareness to Action Takes Time

Building the internal capacity within a museum to both drive and sustain DEAI practices takes time. One major aspect of the work that takes time is shifting leaders and museum professionals away from white-dominant characteristics of perfection, risk aversion, and conflict avoidance to move toward action. Work around DEAI requires trying new things, iterating, and trying again. Making mistakes, being accountable about those mistakes,

iterating, and trying again will support museums and museum leaders in building the capacity and skills to sustain DEAI in the long term. DEAI in museums is not about getting everything perfect; it is about lifelong learning and continuous improvement.

Need to Shift from Transaction to Transformation

As museums consider how to create more equitable outcomes and cultures of inclusion within their four walls and beyond, the focus must shift away from transactional measures (such as only adding x number of racially/ethnically diverse candidates to their staff or forming an internal committee) to the deeper work of truly transforming their museums. Only the museums that are committed and willing to be brave will invest the time necessary to deeply contemplate the actions required for transformational change. When a museum does this, it will recognize and understand the need to examine, dismantle, and reconstruct multiple systems that reinforce the status quo, such as the financial sustainability model, fundraising strategies, overall infrastructure, management practices and policies, and the way it evaluates employee and community knowledge and experience.

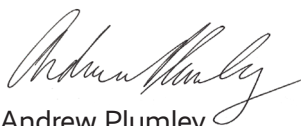
The stated learnings above are not just theoretical ruminations for our field to ponder. AAM has been on our own learning journey around DEAI work, and these overarching learnings have been gleaned through trial and error, planning and iteration, and most importantly, because we have the support of a strong network of individuals and groups joining us in our journey towards a more diverse, equitable, accessible, and inclusive AAM and museum field.

Without the unwavering commitment and support from the Alliance's board of trustees, Accreditation Commission, AAM staff, and many of our partners and members, the progress we have made with our DEAI work, including this report, would not be possible. Thank you all.

Lastly, a specific thank you must go to AAM's DEAI Task Force, co-chaired by Secretary Lonnie Bunch and Elizabeth Pierce. Their pivotal leadership has led us to this report, and towards future work to drive and sustain equity in the museum field.



Laura Lott
President and CEO



Andrew Plumley
Senior Director, Equity and Culture

Part II:

Excellence in DEAI Core Concepts and Key Indicators

The AAM DEAI Task Force's learnings on how to make measurable progress toward excellence in DEAI and start moving toward a transformed museum field can be summarized through the following Core Concepts and Key Indicators:

Core Concepts Overarching themes of excellence in DEAI	Key Indicators To demonstrate excellence in DEAI, museums should:
DEAI is the responsibility of the entire organization.	<ul style="list-style-type: none"> ● Adopt equity as a cornerstone of the museum's mission, strategy, values, management, and culture. ● Embed responsibility and accountability for implementing DEAI policies and processes into operations, job descriptions, and performance reviews at all levels of the institution, from the board of directors, c-level executives, and senior leaders to middle managers, junior staff, and volunteers.
DEAI is an ongoing journey without a fixed end point.	<ul style="list-style-type: none"> ● Take a holistic approach, integrating DEAI into all aspects of the museum's operations through a process of assessment, reflection, capacity building, iteration, and measurement. ● Publicly commit to the ongoing work of transforming organizational culture and dismantling systems of inequity within individual museums and the communities they serve, the museum sector, and society broadly.
DEAI demands an ongoing commitment of resources.	<ul style="list-style-type: none"> ● Allocate financial resources in the museum budget for staffing, capacity building, and internal and external DEAI expertise. ● Dedicate ample time for DEAI work, including individual and collective reflection, trust, and relationship building.
DEAI work must be measured and assessed.	<ul style="list-style-type: none"> ● Define the museum's equity goals as the elimination of identity-based disparities. ● Measure progress by disaggregating data by identity over time.

Context is critically important in all DEAI work. There is no one-size-fits-all approach to diversity, equity, accessibility, and inclusion work because every museum, depending on staff size, budget size, scope, audience, type of museum, and a myriad of other factors, must address specific and contextual needs. Although there is no one right way to approach these issues, this report will outline some of the known foundational concepts any museum will need to understand to start or continue its DEAI journey. Because there is not a one-size-fits-all approach, the Core Concepts and Key Indicators below are not presented in any specific order; each and every one of them holds equal significance. Ultimately, museums must focus on all of these concepts and indicators.



Questions for Reflection:

- 1 How many areas of your museum's operations (e.g., mission and vision, planning, governance, collections, exhibits, programs, fundraising, facilities, human resources) address one or more dimensions of DEAI?
- 2 Has the museum mapped out the underlying principles and values that drive current decisions and direction? Do they advance DEAI? Are they universally applied, or are there pockets of the institution operating from different levels of understanding that require a different orientation to particular values?
- 3 Have you been employing a cross-functional change management process to embed and operationalize equity within your institution's culture? Can you clearly articulate that process? Is there a through line between all staff training and capacity-building opportunities and the work of operationalizing equity in day-to-day operations?
- 4 Is the museum's commitment to DEAI represented in its Core Documents: mission statement, institutional code of ethics, strategic institutional plan, disaster preparedness and emergency response, and collections management policy?
- 5 In addition to the Core Documents, is DEAI explicitly addressed in the museum's:
 - ♦ vision,
 - ♦ website,
 - ♦ staff/volunteer handbook,
 - ♦ policies,
 - ♦ materials for donors and foundations,
 - ♦ program materials,
 - ♦ newsletter/social media,
 - ♦ annual report, and
 - ♦ educational policies/philosophy?

Core Concepts

1

CORE CONCEPT:

DEAI is the responsibility of the entire organization.

In order to both drive and sustain DEAI work, it must be reflected in all aspects of museums, from individuals to organizational culture, to policy and process. This work must not solely rely on the people of color, LGBTQ+ individuals, or the disability community within your museum, and it's not a responsibility that should be held solely by the HR function.

The work around DEAI is everyone's responsibility, from the board and C-suite to middle managers, junior staff, and volunteers. The importance of the work should be reflected within the scope of responsibilities of all museum staffers, each of whom should have explicit goals for the operationalization of equity within the scope of their role and function.

■ KEY INDICATOR:

Adopt equity as a cornerstone of the museum's mission, strategy, values, management, and culture.

In order for the museum field to make and sustain measurable progress toward DEAI, museums must adopt equity as a cornerstone of their missions, strategies, values, management, and culture. **Equity** work, or the mitigation of identity-based disparities both within the museum and in the broader community, must permeate everything that a museum believes and works toward. The closer a museum can align its mission and strategy with achieving more equitable outcomes, the better positioned a museum will be in creating a culture that supports DEAI more consistently.

To be successful, DEAI must be understood as institutional culture change work that requires an integrated change management process encompassing every facet of the museum experience, both internal and external.

DEFINITION

Equity is the guarantee of fair treatment, access, opportunity, and advancement while at the same time striving to identify and eliminate identity-based disparities within a museum and in the broader community. This includes the elimination of policies, practices, attitudes, and cultural messages that reinforce differential outcomes by identity. Equity requires commitment to strategic priorities, resources, respect, and dignity, as well as ongoing action and assessment of progress toward achieving specified goals.

Institutional culture change is complex because of the history of institutional patterns, values, assumptions, and policies that undergird American society. Because of this complexity, museums must have an integrated change management process that is both well-defined and clearly articulated to staff but flexible enough to be an iterative process.

One way to integrate DEAI into a museum's core mission, strategy, culture, and operations is by applying an **equity lens** to its Core Documents (mission statement, institutional code of ethics, strategic institutional plan, disaster preparedness and emergency response, and collections management policy). Using an equity lens will support the museum in including DEAI-related policies that set expectations for the institution, provide clear definitions of DEAI, and support the museum in all aspects of DEAI-related planning.

Indicators of Progress:

- The museum has an explicit, time-bound plan (with clear goals tied to individual and department performance evaluations) to operationalize equity.
- The skills and capacity-building resources are in place for supporting museum staff in operationalizing equity. The museum has an explicit learning plan that outlines ongoing internal learning and external capacity-building support.
- All museum stakeholders can clearly articulate how DEAI is operationalized and connected to the museum's mission.

DEFINITION

Equity Lens: The process of paying disciplined attention to identity while analyzing problems, looking for solutions, and defining success. An equity lens critiques an “equality” approach, arguing that the status quo perpetuates systems of disadvantage in that it prevents structural racism and other forms of oppression from being acknowledged. Application of an equity lens helps illuminate disparate outcomes, patterns of disadvantage, and root causes of inequity.

The purpose of an equity lens is to be deliberately inclusive as an organization makes decisions. It introduces a set of questions into the decision that help the decision makers focus on equity in both their process and outcomes. It is explicit in drawing attention to the inclusion of marginalized populations, typically communities of color, and can be adapted to focus on other communities.

An equity lens is designed to create a more inclusive perspective, drawing attention to how the decision holds potential to affect marginalized groups. An equity lens will not tell you what action to take. Rather, the lens helps you discuss and reflect on the equitableness of the action and decision-making process.

■ KEY INDICATOR:

Embed responsibility and accountability for implementing DEAI policies and process into operations, job descriptions, and performance reviews at all levels of the institution, from the board of directors, C-suite executives, and senior leaders to middle managers, junior staff, and volunteers.

Building on the work codified in *Facing Change: Insights from the American Alliance of Museums' Diversity, Equity, Accessibility, and Inclusion Working Group*, museums must contend with the pivotal role of boards and leadership in marshalling DEAI in their institutions. Without strong executive leadership and governance buy-in and support, the intentional process to operationalize equity cross-functionally and prioritize DEAI goals cannot be initiated or successfully sustained. Although excellence is a responsibility shared among all members of a museum community, the power and responsibility for organizational direction setting lies with those at the top.

Indicators of Progress:

- The museum's board is engaged in DEAI work. The board has its own DEAI goals for which it is held accountable annually. The board has a standing (not ad hoc) equity or DEAI committee.
- There are DEAI goals in the director/CEO/executive director's annual performance plan, and the board holds them accountable for fulfilling those goals.
- Job descriptions for all museum staff have been adapted to reflect that all individual members of the team are responsible for the operationalization of equity, as well as the fulfillment of explicit DEAI and equity goals, within the scope of their role and function. The individual goals are tied to department goals through the annual performance evaluation process.
- Senior leadership is held accountable for defining and achieving DEAI goals.
- There is a standing (not ad hoc) working group or DEAI committee composed of cross-functional museum staff representing functional roles from the board to most junior staff positions.
- This working group (or the work of internal staff dedicated to DEAI in the absence of a cross-functional group) is guided by an explicit equity action plan with clear, time-bound goals and a learning agenda to support building the individual and organizational skills (and tools/resources) to achieve them.
- Buy-in for DEAI and equity work has been intentionally cultivated at all levels of the organization, and the work is successfully tied to the museum's vision, mission, and strategy for impact.

2

CORE CONCEPT:

DEAI is an ongoing journey without a fixed endpoint.

As with excellence, DEAI work is an ongoing journey. Transforming organizational culture and operationalizing equity must be a permanent, cross-functional element of museum management and administration. The work of becoming more diverse, equitable, accessible, and inclusive shifts with both the needs of the museum and its communities, as well as with the shifting American demographics and overall social landscape.

■ KEY INDICATOR:

Take a holistic approach, integrating DEAI into all aspects of the museum's operations through a process of assessment, reflection, capacity building, iteration, and measurement.

Whether museums are just embarking on this journey or have started this work already, their DEAI work should be relative to their size and resources, and they should scale up as they build momentum and capacity along the way. Each role, function, department, and level of the museum should build its capacity to interrogate how it either mitigates or perpetuates inequity within the museum and externally to it.

Adaptability is a key characteristic of this progression. Museums today operate in a dynamic and complex world. Museums that practice DEAI excellence exhibit an orientation toward flexibility; they have an ability to constantly adapt by including and incorporating feedback from their community, peers, the field, and other sources into their programming and space. Adaptability requires vulnerability in that museums must be able to take in hard truths and act on them. Effectively doing so creates opportunities

Why Are We Focusing on Racial Equity?

The reason we focus on race and have a race-forward approach to the work around DEAI is because race is the biggest driver of disparity in both the American context and when we look at the majority of the globe.

When we disaggregate all social outcomes data (income, housing, education, health care, the justice system, etc.) by different identities, we find the biggest driver of disparate outcomes is race. When we look closely at our internal organizational data (hiring, retention, compensation, promotion, professional development dollars, etc.), the biggest driver of disparity is race.



Virtue Signaling and Humility

A note on virtue signaling: Do not put out any commitments to DEAI if you are in fact not committed to this work. If you are not committed, there is high probability that you will be called out for virtue signaling, or the action or practice of publicly expressing opinions or sentiments intended to demonstrate one's good character or the moral correctness of one's position on a particular issue.

A note on humility: In the work around DEAI, there are often individuals and stakeholders who think you are moving too fast, and there are often individuals and stakeholders who think you are moving too slow. In either case, the museum must continue to move forward in its DEAI journey with humility. If you are committed to the work of DEAI and receive skeptical responses, remain humble, listen, come with a curious orientation to those responses, learn and integrate feedback when necessary, and continue on your journey.

Excellence in DEAI begins with a clear and specific DEAI vision statement and related commitment accompanied by specific goals and accountability measures for those responsible for these outcomes.



for different people to have a voice and enables the museum to more proactively and effectively respond to external stimuli.

AAM's excellence programs can support museums' progress, but it is incumbent upon museum leadership to invest in their museums' self-assessment as a critical part of the continued journey for excellence in DEAI. Institutions are encouraged to undertake internal self-assessments annually.

■ KEY INDICATOR:

Publicly commit to the ongoing work of transforming organizational culture and dismantling systems of inequity within individual museums and the communities they serve, the museum sector, and society broadly.

Museums are the most trusted institutions in the United States. Our commitment to this work is a moral imperative as museums hold significant power in shaping culture in broader society. Systemic oppression of all forms, including racism, is embedded into the very fabric of our society. Museums are not immune to this fact, so it is on us to make sure we are committed to this work in the long term.

Working toward racial equity would mean that there would be no difference in those previous outcomes by race. It is imperative that we focus on the root cause of any problem so that we can find sustainable solutions, and when race is not explicitly named, included,



and centered in conversations around DEAI, it is often dismissed.

This does not mean that gender, sexual orientation, ability, age, and other identities aren't important, but it does mean that the lens of race must be present in DEAI.

The stories we choose to tell, the people we proactively welcome in our spaces to speak, and how we use our power to cultivate a stronger, more equitable and inclusive public are of the utmost importance. Committing to DEAI work publicly is a critical step in ensuring that proper accountability is built both within the museum and its staff, as well as externally with regard to the community. Leaders and organizations should commit to DEAI work and share those commitments publicly while acknowledging they are on their own journey toward becoming a more diverse, equitable, accessible, and inclusive museum. Sharing commitments publicly fosters an environment of transparency, vulnerability, trust, and learning, all of which are essential in the work of DEAI.

Indicators of Progress:

- The museum has an annual assessment process for its progress toward established and shared DEAI goals.
- The museum solicits feedback from various community constituents and regularly evaluates if certain voices are being heard more than others. The museum is aware of its history and how that history may impact how constituents relate to the institution.
- The museum has made a public commitment to transform its organizational culture to center equity.
- The museum has committed to mitigating systemic inequity within the museum sector and society broadly.
- The museum has a public, explicit, time-bound DEAI plan that spans several years and includes a defined accountability structure.
- The museum's staff and leadership are aligned on the museum's equity values.
- The museum actively identifies and works to mitigate systems of oppression, such as structural racism, that are relevant to its work and history (for example, as they relate to decolonization activities or community health or education disparities). The museum advocates for and takes action to influence peers, the broader museum sector, and other community organizations (i.e., nonprofits, schools, corporations, government) to do the same.
- The museum has identified patterns of inequity that it has contributed to historically. It has publicly acknowledged and reckoned with its historical role, position, and influence in the community. The museum actively works to dismantle patterns of inequity.

- The museum works to engage in a process of co-creation with multiple community stakeholders. It has ceded power to community members who represent constituencies that have been historically marginalized both within the museum's leadership structure and its partnerships/investments regionally.

3

CORE CONCEPT:

DEAI demands an ongoing commitment of resources.

Resource allocation decisions, especially those demonstrated in a budget, reflect a museum's values and priorities. To operationalize equity cross-functionally and sustain excellence, museums must commit significant financial and human resources to the effort. The importance of the work should be reflected in the museum's annual budget as well as within the scope of responsibilities of all museum staffers, each of whom should have explicit goals for the operationalization of equity within the scope of their role and function.

One area of investment that is often overlooked in DEAI considerations, but is nevertheless critical, is the institution's physical space. Everything that exists inside the walls of a museum and on its grounds is an intentional choice. The built environment sends signals about what is valued and who can participate in and access the museum. Inclusive museums approach an understanding of their space as expansively as possible so that all feel welcome.

■ KEY INDICATOR:

Allocate financial resources in the budget for staffing, capacity building, and internal or external DEAI expertise.

Depending on its size, type, and structure, a museum should have either:

- a dedicated staff person whose scope of work is devoted exclusively to the operationalization of equity and the coordination of this cross-functional body of work across the museum;
- a board committee assigned such responsibility; and/or
- access to consultants who have the knowledge, expertise, capacity, and positional power to drive and measure change.

Many museums have started their commitment to DEAI work by offering educational training, resources, and tools. Creating an explicit DEAI professional development requirement for all staff, leadership, and board members and providing the dedicated time to build these new skills is key. This expectation is critical as DEAI work must focus

on strategic and ongoing cross-functional work in order to become sustainable. There is no one-size-fits-all training solution; however, timely and consistent training can play a critical role in creating a shared understanding of DEAI and the museum's progress toward stated goals among all staff and leadership.

Beyond formal DEAI education, museums must create ongoing forums for discussion, inquiry, and connection so that growth can be continuous and emerging needs can be identified.

If training is the only approach museums take to build DEAI excellence, its impact will not last. However, training can sustain and accelerate progress if DEAI is integrated into the structure and culture of the museum's ecosystem.

Creating a holistic training program is also critical. Some training programs are designed to raise awareness of DEAI topics, while others provide varying levels of skill development. There are a number of credible organizations that can partner with you to provide training and other DEAI services. AAM has a resource hub that provides online resources, webinars, conference seminars, coaching to senior staff, and a central repository for sharing best practices. The Alliance can also connect museums that are well versed in DEAI to mentor and support those that are struggling.

In addition to training, museums must provide **just-in-time** resources and tools that their staff, board, and key stakeholders can access to deepen their learning and practice skills between formal learning sessions. Toolkits, such as those provided by [MP Associates](#), [MASS Action](#), and [GARE](#), can offer good resources to start this work and to dive deeper into the specifics around DEAI. No museum will be able to rely on training and resources alone to move toward institutional culture change.

Unfortunately, recent history has demonstrated that traumatic and public events tied to multiple identities (for example, the #MeToo Movement, the murder of George Floyd, and the increase in AAPI hate crimes during the COVID-19 pandemic) are likely to continue to occur. When events like this happen, museums and museum leaders must address these issues with just-in-time support that can come in multiple forms, including less tangible things like empathy, grace, and understanding.

DEFINITION

Just-in-time learning is an approach to individual or organizational learning and development that promotes need-related training that is readily available exactly when and how the learner needs it.

Just-in-time learning is different from structured training or scheduled professional development, both of which are generally available at set dates and times. What makes just-in-time learning unique is a strategy focused on meeting the learner's need when it arises rather than pre-scheduled education sessions that occur regardless of the immediacy or scope of need.

Indicators of Progress:

- The museum's annual budget includes a permanent line item dedicated to DEAI work with support for staff leading equity work, external consulting, and skills/capacity building.
- The museum's annual budget includes a permanent line item to ensure the building is accessible to patrons with a range of physical abilities.
- Opportunities for professional development on issues of equity and management generally are accessible to all staff. The museum disaggregates staff data by identity to confirm accessibility.
- The museum allocates dedicated time for staff members and departments to build their DEAI capacity and focus on their DEAI-specific goals.

■ KEY INDICATOR:

Dedicate ample time for DEAI work, including individual and collective reflection, trust, and relationship building.

DEAI work is not just about learning and building awareness around topics related to race and other identities. It is also about committing to and dedicating the necessary time it takes for self- and collective reflection. DEAI work incorporates both capacity building and behavior change over time. Building in time for individuals at all levels of the museum to reflect on their own learning and behavior is critical in moving DEAI work forward.

Individual learning and self-reflection is important for personal and interpersonal relationships throughout the museum. Building out dedicated time for collective, group reflection is also necessary for building interpersonal communication and conflict management skills across the museum. The self-reflection that takes place at the individual level must also take place at the group level so that group learning and processing can occur. Collective reflection on specific topics related to race, other identities, and organizational culture allow for multiple voices and perspectives to be heard, which is a key step in building a more inclusive environment for all. Oftentimes, dedicating time for group reflection necessitates an outside facilitator who can manage conflict and different communication styles, which allows all staff to be fully present in the conversation.

Ultimately, by building in time for reflection and connection, trust will gradually build between staff over the course of multiple conversations. As trust continues to build between individuals, departments, junior staff, and senior leaders, authentic relationships have a chance to thrive. DEAI work is relational, so creating authentic relationships based on trust and reflection is a good foundation to build on.

Indicators of Progress:

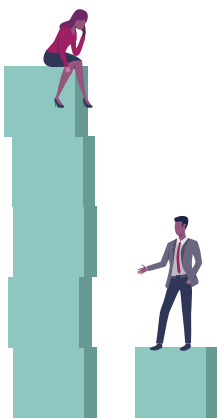
- The museum makes sure it allows for individual self-reflection time around specific topics related to DEAI.
- The museum regularly has group/collective reflection around DEAI topics, including those related specifically to organizational culture, decision making, and transparency.

4

CORE CONCEPT: DEAI work must be measured and assessed.

Today, equity has become a pillar of AAM's work on behalf of the field. Equity requires deliberate attention to internal metrics tied to recruitment, hiring, compensation, promotion, and retention. But in order for the museum field to move our collective equity work forward, we all must align around the fact that working toward equity means narrowing identity-based disparities, both within our museums and in the communities we serve.

Museum DEAI work should be focused on creating conditions where one's identity has no influence on how one fares in society. This includes the elimination of policies, practices, attitudes, and cultural messages that reinforce differential outcomes by identity. All of the data points to the fact that identity-based disparities drive inequity within our museums and the broader field.



Current Reality

When we look at both social outcomes data (housing, education, healthcare, income, etc), and internal organizational data (hiring, retention, compensation, promotion, professional development dollar allocation, etc) and we disaggregate that data by race (and other identities), there are currently disparities that exist.




The Process

Equity work is outcomes based work. Equity work is specifically tied to work that focuses on actively mitigating and eventually eliminating identity based disparities by dismantling oppressive systems and developing practices, processes, systems, and cultures that support us ALL.



Future Goal

We have not yet seen what an equitable world or museum field looks like. It is ongoing, generational work that must be respected and tended to by all. To be successful and to achieve equity means that we would see no disparities in outcomes based on identity.



In order for us to measure and assess how the field is doing, museums must measure indicators of diversity, equity, accessibility, and inclusion over time.

■ KEY INDICATOR:

Define the museum's equity goals as the elimination of identity-based disparities.

As museum professionals and as organizations, we are either actively working to mitigate identity- and ability-based disparities or we are perpetuating them. Due to the nature of structural oppression, a museum does not need overt bigotry and oppression to take place for those things to exist within its walls. We need only look at the racial leadership gap within the field to know that structural inequity is embedded in the field's systems and culture.

Museums should outline diversity goals in hiring plans that focus on increasing diversity at all levels of the organization and have long-term strategic plans that clearly address how work on mitigating disparities both inside and outside of the organization will continue. This work must be spread cross-functionally and be tied to real, context-specific performance metrics.

■ KEY INDICATOR:

Measure progress by disaggregating data by identity over time.

Transparent and consistent measures of accountability are essential to DEAI work, particularly in aligning institutional efforts across the organization. As individual museums and as a collective field, we must normalize the collection and measurement of demographic information internally and externally and disaggregate that data by identity. Our goal in using longitudinal outcomes data is to narrow identity-based disparities both within individual museums and within the field broadly.

One way for us to better understand where identity-based inequity resides both within museums and externally to them is to apply an “equity lens” to our work. Equity can be advanced and deepened even in museums that are led by individuals from marginalized communities who may be further along their DEAI journey in some areas and behind in others.

Internally, museums should measure staffing data to identify areas where disparities exist, such as in hiring, retention, compensation, promotion, professional development dollars, and employee engagement and satisfaction. Museums should also track and publish identity-based representation statistics for their workforce, audience and visitors, hired consultants, and vendors.

Externally, museums should gather both qualitative and quantitative data from the communities they serve and use evaluation tools like equity assessments to examine the cultural responsiveness of their policies and programs for employees, stakeholders, and communities.

Equity impact assessments (when looking at race/ethnicity, they are often called racial equity impact assessments [REIAs]) allow for a systematic examination of how different racial and ethnic groups will likely be affected by a proposed action or decision. These assessments (REIAs) are used to minimize unanticipated adverse consequences in a variety of contexts, including the analysis of proposed policies, institutional practices, programs, plans, and budgetary decisions. The REIA can be a vital tool for preventing institutional racism and for identifying new options to remedy long-standing inequities.

For example, racial equity assessments are used to reduce, eliminate, and prevent racial discrimination and inequities. The persistence of deep racial disparities and divisions across society is evidence of institutional racism—the routine, often invisible and unintentional, production of inequitable social opportunities and outcomes. When racial equity is not consciously addressed, racial inequality is often unconsciously replicated.

Any sort of equity assessment, no matter what identity or identities you are focusing on, is best conducted during the decision-making process, prior to enacting new proposals. These assessments are used to inform decisions, much like environmental impact statements, fiscal impact reports, and workplace risk assessments support organizations across sectors.

Museums can and should analyze disaggregated data and root causes of identity- and ability-based disparities that impact the organizational programs and populations they serve. Museums should have a long-term commitment to policy change based on disparities they see both inside and outside of the organization.

A museum should be able to demonstrate progress on mitigating identity-based disparities by using **longitudinal data** (getting baseline data and measuring over time) to work toward excellence around diversity, equity, accessibility, and inclusion and embedding this work into every aspect of the institution rather than treating them as unconnected to other core functions. It has become much more common for museums to embrace an approach wherein DEAI is a distinct entity, embodied by an explicit full-time staff member, office, or department, as well as integrated into other areas of the museum. At the Alliance, for instance, we have a department specifically focused on DEAI as well as an understanding

DEFINITION

Longitudinal outcomes data refers to data that is collected and measured multiple times within a specific amount of time. Longitudinal data yields multiple and/or repeated measurement of same indicators over time.

among the board, senior leaders, and the most junior staff within each department that DEAI is a part of everyone's overall responsibilities.

Indicators of Progress:

- The museum has an established definition of equity that is understood by all staff and leadership.
- The museum thinks critically about past and current relationships, decisions, and programs using an equity lens, considering how those decisions have or can cause both intentional and unintentional identity- and ability-based disparities.
- The museum is aware of constituents and communities impacted by measurable identity- and ability-based disparities.
- All board, staff, and community stakeholders are given the opportunity to self-identify by race, gender, sexual orientation, ability, and socioeconomic background.
- The museum disaggregates internal (e.g., staff and program) data and external (e.g., constituent and community) data and outcomes by identity and ability.
- The museum has established priority areas where applying an equity lens would yield the greatest advancement on its vision and mission.
- The museum staff and board ask and reflect on questions like:
 - ◆ Who sets the organizational goals?
 - ◆ Where are those goals stated?
 - ◆ How and what internal/external data is collected?
 - ◆ Who reviews the data?
 - ◆ How often?
 - ◆ How are decisions informed by the data collected?
- The museum has identified root causes of identity- and ability-based disparities that are impacting the programs and populations it serves.
- The museum makes efforts to identify identity- and ability-based disparities in compensation data across the museum and by staff level.
- The museum uses longitudinal outcomes data to show how its efforts are impacting identity and ability in the communities it serves.
- The museum monitors the levels of employee engagement and satisfaction with work by identity.
- The museum adjusts programming and educational goals to keep pace with the changing needs of the communities it serves.

Part III:

Excellence in DEAI Going Forward

The task force also highlighted areas for additional future inquiry and made recommendations for how DEAI might be embedded in AAM's Framework for Museum Excellence and the Continuum of Excellence.

Recommendations for AAM:

1 Framework for Museum Excellence/Code of Ethics – People Centered

Within the Framework for Museum Excellence, there is significant DEAI connection to the **AAM Code of Ethics for Museums that needs to be more distinctly made and articulated**. The AAM Code of Ethics for Museums forms the foundation for the entire framework. Discipline-specific organizations may also extend this code of ethics to include additional topics. **One specific issue that is not currently directly addressed in the AAM Code of Ethics that should be considered is:**

- **People-centered issues.** The current code doesn't adequately address issues associated with the individuals who work or volunteer for the institution, such as wage equity and organizational culture.

2 Core Documents

Relevant issues around DEAI should be embedded into the requirements or expectations for the five Core Documents that all museums should have in place. This is an important additional layer because these policies and plans are fundamental for professional museum operations, embody core museum values and practices, and codify and guide decisions and actions that promote institutional stability and viability.

3 Accreditation and Museum Assessment Program (MAP)

AAM should do a self-review of the two flagship excellence programs to ensure that:

- DEAI is prominent in the Accreditation process description and guidelines and addressed in the materials (e.g., Self-Study and Site Visit Report Form).
- Peer reviewers are paying adequate attention to DEAI and have the training and tools they need to ask pertinent questions on-site.

Framework for Museum Excellence



- DEAI is assessed as part of the Accreditation Commission's review and decision-making, and specific examples of best practice and/or areas where improvement is needed are called out.
- Museums participating in the programs are paying the necessary attention to DEAI and are learning/benefitting from an increased focus on DEAI.
- Accredited museums understand that standards evolve and they must concurrently adapt to and embrace changes in the field to remain accredited.

4 Additional Issues to Address

The DEAI Task Force recognized at least two other key issues areas in the museum field that require further examination in years to come. Although the DEAI Task Force did not do a robust study of these key issues, they recommend a future task force take on that work.

4.a DEAI and collections. For example, further exploration is needed around integrating DEAI principles into collections practices including topics such as decision-making in collections and deaccessioning, incorporating community voices into collections policies, and access and use of collections. Further exploration of this issue may entail answering: Who decides on what is to be collected or deaccessioned? What are the basic principles for incorporating community voices into collections policies? How can DEAI principles be applied to who is able to access and use collections?

4.b Environmental implications of sustainability. Being stewards of public trust is a central role of all museums, one that cannot ignore the responsibility to take care of the planet. Because climate change disproportionately impacts marginalized communities, the field's treatment of DEAI and environmental sustainability must be in direct conversation with one another. This is particularly important when considering a museum's environmental impact, materials sourcing, recycling practices, and energy usage.

The Continuum of Excellence

Supporting and celebrating your museum's commitment to standards





Part IV:

Conclusions and Next Steps

Museums are still the most trusted institutions in the country. We have an obligation to continue our work to center DEAI in everything that we do so we can fully realize our commitment to the whole public, not just a select few. The journey toward excellence in DEAI is long and difficult, but it's important for museums to know that the Alliance is on this journey with you, learning right beside you. Our work around DEAI needs commitment and dedication to be better, but it also needs joy, laughter, and hope to sustain the life-long work that will be required to see our collective DEAI commitments through.

The AAM staff and leadership, along with the Accreditation Commission and stakeholder representatives of the excellence programs, will use this report and its recommendations as the springboard to further embed DEAI into excellence programs, sample documents, materials, policies, and processes.

Over the next several years, AAM will be taking a structured approach to build out assessments, toolkits, and resources to support museums in doing the work related to both the Core Concepts and Key Indicators sections of this report. Each Core Concept and Key Indicator has a specific focus and intention, so documents, examples, and resources must be built out to expand on the high-level recommendations outlined throughout this report. Only by working and moving together will we see the changes in the field that we seek to make.



Resources

This is not an exhaustive resource list. Find additional resources on AAM's website:
aam-us.org/excellence-in-deai-report

Core Concept #1:

Maturity Models

In the higher education space, the New England Resource Center for Higher Education (NERCHE) offers a more [field-specific DEAI maturity model](#). The NERCHE model looks at the role of DEAI within each stakeholder group in their ecosystem, from students, administrators, faculty, researchers, and staff as well as DEAI in the school's curricula, teaching philosophy, and institutional mission.

The Centre for Global Inclusion is home to the Global Diversity, Equity & Inclusion Benchmarks: Standards for Organizations Around the World. Drawn from the efforts of the center's board leadership and 95 expert panelists representing a diversity of industries, identities, and geographies, the Global Diversity, Equity & Inclusion Benchmarks, commonly referred to as the GDEIB, is a comprehensive, free maturity model that museums can use and adapt as the foundation to any DEAI assessment.
centreforglobalinclusion.org

Consider using case study(s) from the Metrics & Measurement subcommittee's final recommendations, as they have some great outlines of what this work can look like with actual museums. Listed on pages 5–8 of their final recommendations.

Samples/Models of Commitment

[The Metropolitan Museum of Art: Our Commitments to Anti-Racism, Diversity, and a Stronger Community](#) (July 6, 2020)

James Madison's Montpelier and the National Trust for Historic Preservation's African American Cultural Heritage Action Fund: [A Rubric of Best Practices Established by the National Summit on Teaching Slavery](#) (V 1.0–10.25.18)

[Museums & Race Report Card 3.0](#): The report card still covers the same basic categories (governance, funding, representation, responsiveness, resources, and transparency) AND it now includes a rubric and action steps to help your organization build context for each grade and then take action to improve and transform.

Core Concept #2:

Training Topics for Museums (sample, not exhaustive):

- Authentic communications
- Universal design, disability etiquette, ADA compliance, basic job-related sign language
- Trans inclusion and LGBTQ+ terminology
- Racial equity
- Cultural competency
- Unconscious bias
- Micro-behaviors
- Native American Graves Protection and Repatriation Act (1990)
- Allyship
- Intersectionality
- Inclusive leadership
- How to embed DEAI principles into one's role and job
- Change management

Training Sources

[5 Charts Reveal Key Racial Inequality in the US](#), Charlotte Edmond, Word Economic Forum (June 2, 2020)

[26 Charts That Show How Systemic Racism is in the US](#), *Business Insider* (July 8, 2020)

Roles and Responsibilities

[Harvard Law School Forum on Corporate Governance: Driving Diversity and Inclusion—The Role of Chairs and CEOs](#), by David Mills, Rachel Middleton, Harsonal Sachar, and Russell Reynolds (April 3, 2019)

[The Chronicle of Philanthropy: Chief Equity Officers Are the Next Step in Promoting Equity](#), by Alex Daniels (May 11, 2020)

Core Concept #3

General

[W.K. Kellogg Foundation: Business Case for Racial Equity](#), by Ani Turner (July 24, 2018)

Equity in the Center: [Awake to Woke to Work: Building a Race Equity Culture](#)

[MP Associates, Inc.: Transforming Organizational Assessment Culture Tool](#), by Maggie Potapchuk

[Building Movement Project: Race to Lead Revisited: Obstacles and Opportunities in Addressing the Nonprofit Racial Leadership Gap](#)

[ChangeWork: Characteristics of White Supremacy Culture in Organizations](#), by Kenneth Jones and Tema Okun (2001)

[The Bridgespan Group: The Role of Senior Leaders in Building a Race Equity Culture](#), by Kerrien Suarez (July 2018)

Harvard Business Review: [Do You Know Why Your Organization Needs a Chief Diversity Officer?](#), by [Mita Mallick](#) (September 11, 2020)

Change Management

Strategy Business: [10 Principles of Leading Change Management](#), by DeAnne Aguirre and Micah Alpern (June 6, 2014)

[Kotter: 8 Step Model to Change Management](#)

[cook ross: Telling All Our Stories: 10 Steps to Greater Diversity, Equity, Accessibility and Inclusion in Museums](#), by Johnnetta B. Cole and Natanya Khashan

Cultural Competence Learning Institute: [CCLI National Landscape Study: The State of DEAI Practices in Museums](#), by Cecilia Garibay and Jeanne Marie Olson (2020)

Core Concept #4

BerkeleyHaas Center for Equity, Gender, and Leadership: [The Equity Fluent Leader™ \(EFL\) Glossary of Key Terms](#) provides an overview of language to build one's equity fluency.

The [Racial Equity Tools Glossary](#) provides an overview of terms, which can form the basis of an organization's shared language on race equity.

[Race Forward: Sample Race Equity Impact Assessment](#) is a tool museums can customize with a series of questions designed to ensure an equity lens is consistently applied to relationships, decisions, and programs.

