

# Smithsonian Affiliations Policy

Smithsonian Affiliations creates long-term relationships with organizations in furtherance of the Smithsonian mission to increase and diffuse knowledge and in furtherance of the Smithsonian strategic plan.

Smithsonian Affiliations exposes new constituencies to the Smithsonian's collections, educational programming, and research. Smithsonian Affiliations is one of the ways in which the Smithsonian identifies potential collaborations for educational or research programs and makes long-term loans available, as appropriate and subject to available funding and re-sources.

## **Smithsonian Affiliations is guided by this policy:**

1. The Smithsonian is the largest research and museum complex in the world; its name is trusted by the public as the reliable, authoritative, and objective source of scholarship and information. The Smithsonian's reputation for excellence, integrity, and professionalism must be primary when evaluating potential affiliations, managing the program, and managing particular Affiliate relationships. Affiliates must convey and represent the Smithsonian's reputation to the Affiliate's audience and geographic community.
2. Granting Affiliate status to an organization must advance the Smithsonian mission and strategic plan.
3. The Smithsonian does not affiliate with churches (as defined by the Internal Revenue Code) or organizations whose mission or primary activities or public programming are commercial, discriminatory, partisan, or intended to influence legislation, or elections, promote positions inconsistent with the Smithsonian's mission, or might diminish the Smithsonian's reputation.
4. The Smithsonian provides diverse audiences with access to its vast collections, research, public programs, and staff resources. Affiliates likewise must make their resources available to diverse audiences and the Affiliate's location and activities would be appropriate for Smithsonian official participation under Smithsonian Directive 200 (Nondiscrimination in Events that Involve Smithsonian Officials).
5. Affiliates must be organized as either: non-profit organizations with 501(c)(3) designations and a current Form 990 on file with the IRS; or public institutions and agencies associated with state or local governments.
6. Affiliates interested in obtaining loans from the Smithsonian collections must demonstrate their ability to care for, protect, and exhibit collections in a manner consistent with the standards set by the American Alliance of Museums and the applicable Smithsonian lending unit.
7. Affiliates that maintain collections must do so in a manner that is consistent with applicable law and professional ethics and do not treat their collections as assets for purposes of reporting on their financial statements.

8. Affiliates are responsible for costs incurred in implementing projects. These may include conservation, insurance, packing and shipping, crate construction, copyright clearances, installation/de-installation, security, and travel.
9. Affiliates borrowing through the Affiliations program will allow the Smithsonian to monitor the care of the borrowed objects during the loan period, inspect the affiliate's facilities and the borrowed objects on-site, and will agree to provide the Smithsonian with regular condition reports and access to its other records as necessary to monitor the condition of the borrowed objects. Smithsonian expenses related to these activities shall be borne by the Affiliate. The Smithsonian retains the authority to recall any or all of the objects during the loan period.
10. The Affiliate may use a special logo and the tagline "in association with the Smithsonian Institution" or "A Smithsonian Affiliate" to describe its participation in the Smithsonian Affiliations program. All Affiliate uses of the Smithsonian name, logo, tagline and the names of individual Smithsonian museums are subject to Smithsonian approval; Affiliates shall submit requests in writing, with appropriate designs and examples, and may not proceed without written approval from the Smithsonian.
11. The Smithsonian name and/or logo may not be used by an Affiliate for fundraising purposes or in any manner that would tarnish or diminish the Smithsonian reputation, as determined by the Smithsonian in its sole discretion.
12. Affiliates may not reproduce in any medium any object loaned to it from the Smithsonian collections without the express written permission from the Smithsonian. Any request to reproduce an object from the Smithsonian collections for purposes intended to generate revenue (e.g., postcards, posters, product adaptations) must be submitted in advance and will be the subject of a separate agreement between the Smithsonian and the Affiliate museum.
13. The Smithsonian will not grant any type of exclusivity to any Affiliate museum, whether by geography, collection type, time, or other parameter.

### **2021 Affiliations Policy Update: Parent/Child Organizations**

Beginning in March 2021, any current Affiliate that wishes to expand its Affiliation beyond its original applicant organization must reapply to the Affiliations program for the expansion. The Affiliate is required to follow all current application processes and include documentation for all parts of the organization, including updating information for the existing Affiliate part of the organization. The application will be considered alongside other applications received during that application cycle. Should the expanded organization not be accepted into the Affiliations program, the Affiliation for the original applicant organization will remain intact.

#### **Background:**

Beginning in 2018, organizations that apply to become Affiliates have been required to indicate if they are a parent organization with multiple locations/institutions, or a subsidiary of a parent organization. They have also been required to indicate which part of the organization will be included in the Affiliation; they must specify if they are applying for Affiliate status for the entire organization, including the parent and its subsidiaries, or just one or multiple subsidiaries. The application is required to include documentation for the parent and all subsidiaries that will be part of the Affiliation.