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**Compliance Report for Financially Motivated Disposal of Items from a Museum Collection**

**Museums should complete a Compliance Report if:**

* **They have been requested to do so by the Museums Association (MA) and the relevant Accreditation Assessing Organisation (AAO).**
* **They have read Appendix 4 of the Disposal Toolkit and undertaken all or most of the actions in stages 1 – 3**

The Disposal Toolkit and Appendix 4: Additional guidance for museums on financially motivated disposal can be found at: [www.museumsassociation.org/collections/sale-of-collections](http://www.museumsassociation.org/collections/sale-of-collections)

The information provided in this form, together with any supporting evidence, will be used by the MA’s Ethics Committee and the AAO to form a view on whether the proposed sale meets the requirements of the MA’s Code of Ethics and the Accreditation Standard. It may take several months from date of submission of the Compliance Report for either organisation to be able take a formal view on the proposed sale.

Please submit the completed Compliance Report to:

*[Insert relevant contact details of the MA and each AAO]*

If you require any advice or assistance in completing the Compliance Report please contact the MA or your relevant AAO.

**Confidentiality**

The Museums Association:

The information provided here will be kept strictly confidential to members of the Ethics Committee and MA staff that work with the committee, but please note that the MA may discuss and share the information you provide to the MA with other museum-sector organisations that are also involved in advising on or assessing your proposal. The MA will keep its advice strictly confidential unless or until the museum’s intention to proceed with the proposal for financially motivated disposal enters the public domain. At that point the MA’s normal practice is to publish its advice in the interests of transparency and accountability. If a proposal for financially motivated disposal is not in the public domain, or is abandoned, the MA will keep its advice confidential. The MA may in this case seek the museum’s permission to publish the advice, or refer to advice we have given in general terms, but without identifying the museum concerned.

Accreditation Assessment Organisations:

AAOs will not volunteer information, but as public bodies they may be subject to Freedom of Information requests. Therefore they are not able to guarantee that all information will be kept confidential.

Please answer the following questions (additional material can also be submitted as evidence to support your answers):

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| 1. Name of museum |  |
| 2. Name of organisation owning items being considered for sale (if different) |  |
| 2. Your name and contact details: |  |
| 3. Please provide a description of the item(s) that are being proposed for sale: (*you might wish to include a photograph along with a full description or an extract from your accession register)* |  |
| 4. How will the proposed disposal significantly improve the long-term public benefit derived from the remaining collection and *how the proposed disposal will serve the long-term local and general public interest?* |
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| 5. The proposed disposal should not be to generate short-term revenue (for example to meet a budget deficit); please outline how the proceeds from the sale will be used? |
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| 6. Please outline how the proposed disposal is a last resort after other sources of funding have been thoroughly explored? |
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| 7. What extensive prior consultation with sector bodies has been undertaken? |
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| 8. How have the views of stakeholders and those who have a vested interest in a proposed disposal been sought (for example, donors, researchers, local and source communities and others served by the museum)?  |
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| 9. How do(es) the item(s) under consideration lie outside the museum’s established core collection as defined in the collections development policy * As part of this please:
	+ explain how the disposal relates to the museum’s long-term collections development policy
	+ give details of the process the museum followed to define its core collection, including details of any collections review
	+ state any external advice that the museum sought to help define the core collection and determine whether the items lie outside the core collection (please enclose copies of any external advice)
	+ state when the museum’s collections development policy was last revised or reviewed (please provide a copy of your current and previous collections development policy)
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|  |
| 10. How will the museum restrict any money raised as a result of the disposal solely and directly for the benefit of the museum’s collection? Money raised must be restricted to the long-term sustainability, use and development of the collection. Please outline any mechanisms that will be put in place to restrict the money for that purpose: |
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| 11. In general when disposing of items the Code of Ethics says ‘Give priority to transferring items to Accredited museums. To maintain public confidence in museums wherever possible do not transfer items out of the public domain’. Please explain how you have taken this into account: |
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