

Port City Social History Museum

SAMPLE Collections Stewardship Assessment

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This sample report from the Museum Assessment Program is based on a real museum. The report is a good example of the challenges typical of many museums participating in the MAP program. All of the names of the staff, board members, museum, town, buildings, as well as the Surveyor, have been changed.

Why is this a good report?

This is an excellent report with detailed instructions and recommendations on how to accomplish collections management goals. Interspersed throughout the report are books, websites, and other materials that the museum will find useful to achieve their objectives. This can be more useful than just listing bibliographic materials at the end and expecting the museum to connect between the material and a particular bullet point. Additionally, the museum is preparing for reaccreditation, and this report targets that aspect in many of its explanations and suggestions.

**COLLECTIONS MANAGEMENT
ASSESSMENT REPORT**

PORT CITY SOCIAL HISTORY MUSEUM

PORT CITY, NC

DECEMBER 29, 2010

REPORT WRITTEN BY SURVEYOR:

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Tourist Area History Museum

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Executive Summary



The Port City Social History Museum serves as an invaluable repository for keeping and telling the story of the Civil Rights Movement, especially as it played out in the Port City, North Carolina area. The Museum's collections include Fine Arts, oral histories, photographs, and archival documents. These collections are used throughout the Museum's permanent exhibit galleries as well as in temporary exhibits and in its many varied educational programs. The Museum's proximity to many of the sites that are important to the Civil Rights Movement in Port City better enable the visitor to put the stories told within its exhibits into context.

The Museum's exhibits and educational programs are well planned and presented. The staff is well aware of the strengths and weaknesses of Museum's collections management activities and is eager to improve upon these. In addition the Board is in full support of the staff and is eager to aid in the improvement of activities as they relate to the collections.

Major areas in need of improvement include collections storage and preservation, additional staff to care for collections, collections management policies and procedures, and marketing of collections. This report will address each of these issues along with others and will include suggestions on how to improve each of these.

Introduction

The Museum Assessment Program's Collections Management Assessment (CMAP) is intended to help participating institutions "focus on collections management issues in the context of the museum's total operations, including mission, governance, finance, interpretation, and marketing. The emphasis is on collections stewardship, including scope of collections, acquisitions and deaccessioning, legal and safety issues, documentation, backlog, inventory and risk management." This report summarizes the findings of my review of the Port City Social History Museum, which were based on the review of written materials submitted by the organization as well as the site visit. The following documents of the Port City Social History Museum were reviewed prior to the site visit:

- CMAP Self Study Materials
- 2013-2018 Strategic Plan
- Code of Ethics for the Port City Social History Museum
- 2013/2014, 2012, and 2011 Financials
- Exhibition Calendar 2013-2014
- Collections forms and policies
- Emergency Procedures Handbook

The site visit was conducted on September 12 and 13, 2014 during which time I had the opportunity to meet with staff, the president of the Board of Directors, tour the facility, and tour offsite storage locations (see Appendix 1). During the first day of the visit, I met with President/CEO Abraham Lincoln. Afterwards I was given a tour of the Museum's exhibits and public spaces by Grover Cleveland, Head of Archives. Upon completion of this tour, I was given a tour of the Museum's current offsite storage location by Mr. Cleveland and Teddy Roosevelt, Head of Education. Following lunch with the staff, Mr. Cleveland and Mr. Roosevelt gave me a tour of the archival and education storage, work, processing, and research areas.

During the second day of my visit, I met with Board President Calvin Coolidge as well as the key staff involved in the assessment. This meeting enabled me to gain further insight as to

how the Board plans to utilize the findings of the CMAP as well as their desires for the future of the Museum as a whole. Following this meeting, I met with members of the Education Staff including Mr. Roosevelt, Jackie Kennedy, and Lady Bird Johnson. Following this meeting was a meeting with the Archival Staff including Mr. Cleveland, Martha Washington, Dolley Madison, and Ms. Kennedy. Discussions were continued into the lunch break where I continued to speak with members of the Archival Staff as well as with Chester A. Arthur. During each of these meetings I had the opportunity to speak with each staff member regarding their duties, their concerns regarding the collections, and their vision for the future of the collections and the Museum as a whole in addition to what they hope to gain from the assessment report.

The main goals for this Assessment as identified by the staff and Board of the Port City Social History Museum in their MAP application and Self-Study are:

- Good Collections Management
- Creation of a comprehensive Collections Management Policy
- A process of conservation guided by a Collections Management Policy

In addition to these stated goals, the staff also expressed concern over lack of storage space, understaffing, budget constraints, collections development, and cultivation of collections donors.

The following findings and recommendations should be used to help the Port City Social History Museum gain a better understanding of the short and long-term goals needed to improve the care and management of the Museum's collections. The included resources should be used by the Museum to enhance the findings and give the staff and Board additional support to address these issues.

Institutional History

In 1969, former Port City Mayor Woodrow Wilson conceived the idea of a museum-like facility within the city to "memorialize its civil rights history." It wasn't until Martin Luther King, Jr., Port City's first Black mayor, came into office that Wilson's vision was put in motion. In 1989, a Task Force was created with instructions to "craft a mission statement and thematic plan..." The Task Force wanted to create an Museum rather than a museum to imply an "action-oriented establishment."

The idea was met with opposition at first, but the city of Port City was eventually able to secure funds through the issuance of general revenue bonds. In time, the community as a whole recognized the importance of the Museum and civic leaders and foot soldiers of the Civil Rights Movement wholeheartedly supported the project. The Port City Social History Museum was chartered as a non-profit 501(c)3 organization in 1990 to "promote civil rights and human rights worldwide through education," and opened its doors to the public in 1992.

The Museum's exhibition galleries include over 28,000 square feet of permanent exhibit space with an additional 3,000 square feet of temporary exhibit space. The Museum's collections consist of more than 1,000 three-dimensional artifacts, more than 5,000 archival items, and more than 5,000 photographs. At any given point, approximately 15-20% of these collections are on display within the Museum's exhibits.

Though a relatively young organization, the Museum has received many honors and accolades from the museum community and the nation. In 2010, the Museum received AAM Accreditation as well as a Generic Museum Award, which is issued by the President's Committee on the Arts and the Humanities. 2011 brought more recognition for the Museum with its acceptance into the Smithsonian Institution's Affiliation Program. In 2012, the Museum was again honored at the national level as it was awarded a National Medal for Museum Service presented by the Museum of Museum and Library Services (IMLS).

A successful grant proposal writing and fundraising program has enabled the Museum to continually improve upon its educational programs and exhibitions. In addition, in 2012 the Museum added the position of Vice President of Institutional Programs to "implement its strategic objective of creating more dynamic programming by aligning the activities of the Education and Archives Departments."

Mission and Planning

A. Mission

The current mission statement of the Port City Social History Museum is "to promote civil and human rights worldwide through education." This mission was adopted in September 2006 and last reviewed in June 2012.

The Port City Social History Museum's collections clearly reflect the mission of the organization. As stated in the Museum's Self-Study Questionnaire, "the mission of this facility is to tell the story of events in Port City and to affix it within a larger framework that tells the story of human rights disparities worldwide." This is achieved through the Museum's permanent, temporary, and traveling exhibits, educational programs, and archival initiatives including the global oral history project that is currently underway.

B. Planning

The Port City Social History Museum's current strategic plan outlines activities for the years 2013-2018. The Museum also has in place a "Strategic Plan Summary for Public Relations/Marketing" that outlines goals through 2015. Strategic Plan goals related directly to collections activities are as follows:

- Increase fee-based service revenues by 10% annually (admissions, archival material purchases, traveling exhibitions)
- Utilize permanent/special exhibitions and collections to drive program development

It is important that the strategic plan include actions related to collections management and care. Currently, the "Program Committee" is charged with all governance decision making tasks that related to public programs and collections. The Museum should consider creating a dedicated "Collections Committee" to deal with all collections management activities. In addition, it would be beneficial to divide action items into short, medium, and long-range goals. The strategic plan neglects the following areas which should be added:

- Use, care, and development of collections
- Marketing and Public Relations
- Programming
- Exhibitions

In addition to the Museum's strategic plan, a collection plan should be created to guide the growth and maintenance of the Museum's holdings. According to AAM, "by creating a plan, a

museum seeks to gain intellectual control over collections and to ensure that it has appropriate staff and resources for collections care.” This document would serve to enhance the strategic plan and give archival and education staff a course of action for the future of the collections. For information on creating a collection plan, see Appendix 1 – AAM’s Information Center Fact Sheet “Outline for a Collections Plan,” Appendix 2 – AAM’s Information Center Fact Sheet “Creating an Intellectual Framework for Collections Planning,” Appendix 3 – AAM’s Information Center Fact Sheet “Collections Planning: Strategies for Planning and Implementation,” and Appendix 4 - “How to... Develop a Collections Plan,” from the Illinois Association of Museums.

Recommendations:

- **Addition of goals related to use, care, and development of collections; marketing and public relations; programming; and exhibitions to the current strategic plan**
- **Creation of a Board-level Collections Committee to deal with collections management decisions**
- **Creation of short, medium, and long-range goals within the strategic plan**
- **Creation of a collections plan to guide staff in collections activities**

Interpretation

A. Audience and Visitors

Since its opening in 1992, more than 2,000,000 people have visited the Port City Social History Museum. In addition to the Museum’s annual on-site visitation of almost 75,000, an additional 80,000 are reached through the Museum’s off-site programming. A study conducted by the North Carolina Bureau of Transportation concluded that more than 95% of visitors to the city of Port City traveled specifically to tour the Museum. Another study stated that in 2002-2003, the Museum had 85,000 paid visitors, almost half of whom visited from other states and an additional 12% were from cities throughout North Carolina.

The target audience of the Port City Social History Museum, as identified in its Self-Study workbook, is the residents of “the local county, the state of North Carolina, immediately surrounding states of Tennessee, Georgia, Florida, Virginia, the United States and foreign countries.” School-aged children comprise more than 60% of the Museum’s annual visitors.

The Museum uses its exhibits and programs as the main catalyst for attracting visitors. In addition, the Museum has collaborated with the Port City Museum of Art and created the Port City Cultural Alliance, a consortium of several museums within the Port City area. All of these efforts help to increase the Museum’s visibility and to attract new and returning visitors. The overall goal of the Museum’s exhibits and public programs is to build “awareness about the Museum, increase institutional membership, [create] favorable media tone and [promote] tourism.”

The Museum has long been thought of as an African-American Institution, although its exhibits, programs, and collections transcend the African-American experience by also focusing on ongoing human rights issues across the globe. Overcoming this perception is the biggest obstacle faced by the Museum as it relates to visitation. A visit to the Museum’s website somewhat perpetuates this opinion as there are very few areas that highlight initiatives other than those related to the African-American experience during the American Civil Rights Movement. The Museum’s latest brochure does a better job at expanding on the

global human rights focus, but there is still room for improvement. The Museum should continue to expand its marketing and highlight other important themes included in its exhibits, programs, and collections. Since the Museum uses its website for a large portion of its marketing, these additional themes should be more prominently featured throughout the site. In addition, brochures should also highlight these topics.

B. Community

Port City, NC has a population of about 243,000 people, of which approximately 24 % are white and 73.5% are African-American. The median age is around 34 years and about 18.5% of the population has a bachelor's degree or higher. Since over half of Port City's population is under the age of 45, the Museum is well situated to create life-long learners and supporters of its exhibits and programs. It is important that the Museum continue to reach out to families, young adults, and young professionals in order to gain a better understanding of the needs of these audiences as they related to the Museum's offerings. While the Museum does a wonderful job of obtaining feedback through visitor surveys, it would also benefit from the creation of focus groups composed of individuals from the surrounding communities. The results of these meetings could help the Museum with programmatic and exhibition planning.

C. Public Programs

The Port City Social History Museum has several public programs in place that not only reach the local community, but reach communities in other states through the many partnerships that the Museum's staff has cultivated. Highlights of the Museum's public programs include a Speakers Bureau which is comprised of staff, foot soldiers from the civil rights movement, former staff members, and Board members; a cable television program that has been active for fifteen years that focuses on event and exhibition promotion; and programmatic partnerships with the Port City Cultural Alliance, the local Jewish and Hispanic Communities, and local schools. Because of recent cuts in school budgets, the Museum is increasingly conducting educational programs in the public schools. As a service to the public, 95% of the Museum's public programs is provided free of charge. The Museum utilizes its collections in some manner in all of its public programs. Reproductions of documents and photographs from the collections are often used in classroom settings and the Museum's oral history collection is used in the creation of plays and other interpretive programs.

The Museum has also partnered with museums throughout the country to teach the Civil Rights movement. Partner museums include the United States Holocaust Memorial Museum, National Civil Rights Museum in Memphis, High Museum, and the Indianapolis Children's Museum. In addition, the Museum has partnered with a literacy program in Nashville, TN.

In creating its curriculum guide, which is available on the Museum's website, the Museum created lesson plans utilizing materials from its archives in addition to themes contained in its exhibits. School tours of the Museum's exhibits include a program where 5th graders read a book based on the Civil Rights Movement and compare and contrast themes in the book with those found in its exhibits. The staff has also created a scavenger hunt for items on display in the exhibits. The staff is continually working to incorporate its collections into its educational programs, and is working to create educational programs to be published on the Museum's website.

The Museum has done a great job of incorporating its collections into its public programs as well as in creating partnerships with other cultural organizations and reaching audiences outside of the Port City area. The Museum should continue to incorporate reproductions of collections materials and duplicate items from its archives in its public programs. By using duplicate materials, the Museum will allow the public to have a better connection with the history of the Civil Rights Movement. In addition, the Museum should continue to create public programs based on its archival and oral history collections.

D. Exhibitions

The Port City Social History Museum's exhibits comprise more than 28,000 square feet of the museum's facility. The exhibits highlight the early history of Port City, the story of the Civil Rights Movement as experienced in Port City and throughout North Carolina; and the struggle for International Human Rights. The Museum also has two temporary exhibit galleries and materials from the fine arts collection are displayed throughout the Museum's corridors. In addition, the "Martin Luther King, Jr. Resource Gallery" features sixteen computer stations that contain excerpts of twenty-five oral histories from the Museum's Oral History Collection. The Museum just completed a campaign in which it renovated certain exhibits and expanded interpretation. The exhibits effectively utilize materials from the Museum's collections and are professionally installed.

Though the Museum's exhibits were created and installed by professional exhibition teams, there are some basic steps that the Museum should undertake to ensure the proper care and preservation of items on exhibit. Every effort is made to rotate materials on temporary display every six to eight weeks. This practice should continue especially for paintings displayed in corridors. UV film has been placed on all windows; however it is important to rotate materials displayed opposite these windows to lessen the likelihood of fading. The Museum should implement a housekeeping schedule in addition to its regular custodial schedule for all materials on exhibit. For additional information on housekeeping plans, please see Appendices 5 – 9 as well as these links:

- *Plan Your Work and Work Your Plan: Housekeeping in a Historic House Part I*
<http://www.illinoisheritage.org/Inserts/insert125.HTM>
- *Plan Your Work and Work Your Plan: Housekeeping in a Historic House Part II*
<http://www.illinoisheritage.org/Inserts/insert126.HTM>

Many artifacts not displayed under Plexiglas vitrines have accumulated dust. In addition to creating a housekeeping manual, the Museum should research the best methods of cleaning each type of object. Light levels should be lowered to proper levels for the types of objects on display. A Bible on display has been continually exhibited open to the same two pages. These pages should be changed monthly to reduce the risk of fading. There are also several artifacts that are displayed within reach of visitors. If it is not possible to place these artifacts behind Plexiglas, signs should be created to discourage museum patrons from touching these objects, ensuring to explain why touching the objects is damaging. For additional information on these subjects, refer to Appendices 10 – 12 as well as the National Park Service Conserve O Gram series at http://www.nps.gov/history/museum/publications/conservoogram/cons_toc.html#collectionpreservation. In addition, the following table lists proper light levels for various types of

materials. For objects made of two or more types of materials, it is important to refer to the levels for the most sensitive material type.

Type of Object	Recommended Light Level (in Footcandles)
Sensitive Materials including textiles, watercolors, photographs, paper materials	5 Footcandles or less
Less Sensitive Materials including oil paintings and objects made of wood or leather	15 Footcandles or less
Least Sensitive Materials including metals, ceramics, stone, and glass	30 Footcandles or less

The Museum has planned its temporary exhibits schedule through December 2011, which includes several traveling exhibits from other institutions. These exhibits all focus on some aspect of African-American culture. The Museum uses these temporary exhibits to bring in new and repeat visitors. As such, the Museum should conduct surveys and/or focus groups to gain a better understanding of the types of exhibits the public is interested in seeing. Prior to conducting these surveys, the Museum should have a list of potential exhibits ready from which the participants can choose. The Museum should also seek out exhibits that focus on human rights in addition to African-American history and the Civil Rights Movement. By including these types of exhibits, the Museum would be better able to fulfill its mandate of teaching about human rights around the world.

The Museum also has its own traveling exhibition program in place. These exhibits are advertised on the Museum’s website and include four exhibitions that focus on various aspects of the Civil Rights Movement. The Museum charges a rental fee for these exhibitions, and because of recent economic factors the Museum has recently created an income line item for the staff to meet in relation to these exhibits. To better advertise these exhibits to the museum community, the Museum should seek free and inexpensive promotion methods. Some avenues to pursue are the Museum-L listserv, AASLH’s exhibition clearing house, and AAM’s Museum Marketplace, all of which are free to use.

The Museum has been without a Curator of Exhibits since 2006. In the absence of this position, the Head of Education has assumed all responsibilities related to permanent, temporary, and traveling exhibits in addition to his normal duties within the Education Department. The Museum may want to consider using guest curators when creating in-house exhibits until a Curator of Exhibits can be hired. In addition, the Museum should seek qualified volunteers and/or interns to assist with exhibitions.

E. Research

The Port City Social History Museum serves approximately 200 researchers who visit its archives each year. Approximately 90% of the Museum’s archives has been processed and is available to researchers when not on exhibit. Researchers usually focus on events and personalities of the Civil Rights Movement. The staff requires that researchers provide a copy of any products created as a result of using the Museum’s archives. These products then become a part of the Museum’s library collection and are made available to future researchers.

Currently the Museum's research facility is primarily advertised via its website. Given the wealth of information contained within the Museum's archives, it would greatly benefit the organization to better advertise its holdings to the public. The Museum should consider creating a brochure that specifically promotes the archival collections. The Museum should also continue to work with local universities to create research projects which focus on the Museum's holdings. In addition, the Museum should continue to promote its holdings to other professionals when attending conferences and other professional development opportunities.

F. Publications

While the Port City Social History Museum does not have an active publications program, they consistently publish an annual report and newsletters in addition to their website, brochures, flyers, and gallery guides. To date, the Museum has also published three books, the newest of which was done in the style of a coffee table book. With the Museum's vast archival collection, the publication possibilities are only constrained by staff time and money.

A copy of the Museum's 2012 Annual Report was included in its MAP Additional Materials packet. While this publication discusses collections related activities, it does not highlight individual artifacts or archival collections. Since this publication's primary audience is the Museum's membership, the Museum should consider adding a section devoted to collections and/or collections related activities to give members a better understanding of the behind-the-scenes work that goes on at the Museum.

The Museum's promotional collateral includes images of its exhibits as well as some individual artifacts. These pieces showcase the materials in a positive and engaging manner that makes the reader want to come see the actual items. Several generations of the Museum's brochure were available for perusal, and each represents the collections better than the last. The Museum should continue to use collections items in its brochures, flyers, and gallery guides to highlight important artifacts that are on display as well as to promote the collections overall.

The Museum's website serves as one of its main portals in publicizing its collections materials. The website contains a link, which is prominently displayed, to the archives from the homepage. Once the archives page is reached, the visitor has the opportunity to search the collections and learn more about the Museum's oral history programs. This page also contains an interactive timeline of Civil Rights that occurred in "Port City" and "North Carolina/National." These pages could be improved by using scans of archival materials and excerpts from oral histories to enhance their overall look. This would also help to pique the visitor's interest, especially in the oral history projects, by focusing on compelling items or stories that stir emotion and cause the visitor to think about the materials. In addition, the timeline could be improved by making it larger and again using materials from the collections that directly relate with the highlighted event. The timeline currently uses photographs, but it is unclear if these images are from the Museum's collection or if they are from other sources. It is important to ensure that proper credit lines are used on images throughout the website.

G. Marketing and Public Relations

The Port City Social History Museum does not have a separate marketing budget and relies on its website for most of its promotional ventures. Despite this, the Museum seems to be able to adequately promote its exhibits and programs to the Port City community and beyond.

In addition to its own website, the Museum is featured on the City of Port City's and the Greater Port City Convention and Visitors Bureau websites. Partnerships such as this should continue to be pursued, and the Museum should seek other websites on which its link could be listed such as those for African American and Civil Rights histories.

The Museum should include marketing plans in its long-range plans to guide it on how to continue to reach its core audience as well as how it plans to expand its audience in the future. The Museum should seek out additional unpaid advertising opportunities as they exist locally and nationally by forming relationships with local and national media. Brochures and/or flyers should be created to promote the Museum's special exhibits and programs in addition to the current brochure which highlights the Museum's permanent exhibits. These brochures should be placed in local tourism offices, hotels, and in rest stops along local interstates. In addition, the Museum should set aside funds in its budget in order to expand its paid marketing initiatives.

Recommendations:

- **Continue to expand marketing initiatives to highlight non-African American collections, exhibits, and programs**
- **Feature the human rights elements of the Museum more prominently on its website**
- **Highlight human rights initiatives in Institutional brochures**
- **Conduct visitor surveys and focus groups to gain a better understanding of the needs and wants of the local community as they relate to public programming and exhibitions**
- **Continue to create educational programs that utilize materials from the collections and incorporate reproduction and duplicate materials in its programs**
- **Create and implement a housekeeping plan for the care and upkeep of the Museum's exhibits**
- **Research proper cleaning methods for artifacts displayed in open areas**
- **Lower light levels throughout the exhibits to acceptable levels for the types of materials on display**
- **Bring in temporary exhibits that focus on international human rights issues**
- **More actively promote the Museum's own traveling exhibition program**
- **Utilize guest curators for temporary exhibits until a Curator of Exhibits can be hired**
- **Create a brochure dedicated to the promotion of the Museum's archives**
- **Work with local school and universities to create research projects that make better use of the Museum's archival collections**
- **Add scans of archival materials to the Museum's website, specifically on the archives pages**
- **Ensure that images on the Museum's website are properly credited**
- **Continue to seek marketing partnerships**

- **Seek additional unpaid advertising opportunities**
- **Continue to cultivate relationships with local and national media outlets for marketing purposes**
- **Create brochures and/or flyers to promote the Museum’s permanent exhibits and special exhibits and programs, and place these brochures throughout local hotels and interstate rest stops**
- **Set aside funds to increase the Museum’s paid marketing initiatives**

Collections Stewardship

A. Scope of Collections

The Port City Social History Museum has two collections policies in place – one for the archival collections and one for the fine arts collections. The acquisition policy of the archival collections is to “collect, house and make accessible records and documents relating to events that occurred during the Civil Rights Movement of the 1950s and 1960s in the city of Port City, and the United States, and to build a collection of documents that accurately reflects the continuing historical context in which those events have evolved to the present level of successful interracial cooperation. In addition, records and documents on the global scope of the movement for human rights.” This is accomplished through collecting the following types of materials:

- Correspondence
- Journal, diaries, memoirs
- Speeches
- Photographs, films, video and audio tapes
- Scrapbooks
- Legal documents
- Financial records
- Newsletters, bulletins
- Newspapers and magazines, as clippings or whole
- Programs
- Brochures, flyers, handbills, posters
- Business records, ledgers
- Minutes, reports
- Church records, sheet music
- Government documents
- Drawings, blueprints

Materials selected for inclusion in the fine arts collection are selected on the basis of whether or not they fall in line with the Museum’s mission statement.

The Museum’s collections consist of more than 6,000 objects and photographs currently on display in its permanent exhibits, more than 500 oral history interviews, 364 pieces which fall under the Museum’s fine art collection, and more than 10,000 archival materials. The Museum also maintains a large collection of library materials that are cared for by the Archives staff.

The collecting goals and priorities as outlined in the Museum’s Collections Management Policy are not specific enough to properly guide the staff in its collecting efforts. To alleviate this, a collection plan should be created to elaborate on these goals and priorities. Specifically, the Museum should further define which holdings it feels are underrepresented

in its collection, especially as they relate to the fine arts collection. The Museum should also consider merging all collections related policies and procedures into one document rather than the two separate documents that currently exist. This will allow the Museum's staff to gain a better understanding of the types of materials it collects, the overall scope of the collections, the areas in which the collections need improvement, and the procedures for documenting and caring for each type of collection.

B. Collections Management

The Port City Social History Museum has in place an Archives Collections Policy that was approved on June 20, 1996 as well as Guidelines for Exhibitions and Acquisitions that was approved on December 18, 1997 and revised on November 2, 2012. The Collections Policy includes the following sections:

- Institutional Mission
- Archives Division Mission
- Goals and Objectives
- Inter-Institutional Cooperation
- Acquisition Policy Statement
 - Acquisition Activity Levels
 - Conditions of Acceptance
 - Conditions of Retention
 - Types of Materials Accepted
 - Exclusions
- Use of the Collections
- Fees

The Guidelines for Exhibitions and Acquisitions includes a special exhibition proposal, guidelines for exhibitors, and guidelines for evaluation of acquisitions. This last section outlines procedures for the acquisition of items for the Museum's fine arts collection including:

- Relevance
- Quality
- Condition
- Storage
- Maintenance
- Title
- Value
- Donor Restrictions
- Donations/purchases
- Insurance

Despite the establishment of these two documents, there are several Collections Management areas that are either overlooked or in need of further elaboration. In addition, the Museum should consider combining the acquisition procedures contained in the Guidelines for Exhibitions and Acquisitions with the policies contained in the Archives Collection Policy into one combined Collections Management Policy. It is important to complete this new CMP prior to the Museum's reaccreditation review in 2013. This new document should contain the following information:

- Statement of Purpose
 - Mission

- Collections related goals and objectives
 - Role and purpose of collections in carrying out mission
- Statement of Authority
 - Operational authority of the Museum
 - Role of Board, committees, director, and staff in delegation of authority in collection activities
 - Decision-making chain of command
 - Responsible person for dealing with extraordinary decisions
- Definition of Collections
 - Describe and distinguish the types or status of collections
- Archives, Fine Arts, Exhibits
 - Distinguish management differences
- Scope of Collections
 - Define collecting parameters, goals, and objectives
 - Define present nature and scope of collections
 - Time period, historic significance, geographic locality, cultural themes, etc.
- Acquisition Policy
 - Who has authority for accepting items into the collection
 - Acquisition Criteria
 - Methods of Acquisition
 - Who is responsible for the Deed of Gift and any other records associated with the accession
 - Where are the collections records to be maintained
- Deaccession Policy
 - Who has authority to deaccession and dispose of collections
 - Deaccessioning criteria
 - Accepted methods of disposition for deaccessioned materials
 - How will the funds resulting from the sale of deaccessioned items be used
 - Who is responsible for maintaining Deaccession records
 - Where are Deaccession records to be maintained
- Preservation
 - Who has the authority to authorize preservation activities and what are staff responsibilities
 - Who maintains preservation-related documentation
 - Standards of care
 - Who is responsible for monitoring preservation needs
- Use and Access to Collections
 - Statement that fees may be charged for any copies or reproductions per the approved fee schedule
- Care and Conservation of Collections
 - Protection against and procedures for handling damage and/or loss caused by fire, theft, vandalism, natural light, and environmental factors of collections in storage and on exhibit
 - Who is responsible for oversight in the aforementioned areas
- Loan Policies
 - Who has the authority to approve loans
 - What records are required for all loans and who maintains the records
 - Who is responsible for monitoring loans

- Are loans renewable after the initial 6 month term
 - How are any loan issues resolved and who has authority to resolve issues
 - Review whether or not it is necessary for the Board of Managers to approve
- Records
 - This section needs to be added to the CMP and should include:
 - Registration records that include a descriptive catalog record and evidence of ownership of the item(s), loan documents, exhibit history, and provenance research – see Malaro, *Managing Museum Collections* pages 55-56
- Insurance
 - This section needs to be added to the CMP and should include – see Malaro, *Managing Museum Collections*, page 56:
 - Role of insurance
 - Will the Museum cover collections while on the Museum’s premises – if so, will they be insured as full or partial value
 - Will loans be insured, by whom, who pays
 - What insurance records will be maintained and by whom
 - Who has authority to approve insurance matters
- Inventories
 - This section needs to be added to the CMP and should include
 - Establishment of inventory procedures
 - Method of maintaining inventory records
 - Periodic inventories
 - Spot-checking inventories
 - Procedures to follow when collections items are deemed to be missing

In continuing to prepare for reaccreditation, the Museum may want to consider enrolling in the American Association for State and Local History’s Standards and Excellence Program for History Organizations (StEPS). This program empowers historical organizations to look at their practices and procedures in the areas of Collections Stewardship; Mission, Vision, and Governance; Audience; Interpretation; Stewardship of Historic Structures and Landscapes; and Management and compare them to national standards and best practices. The StEPS program, along with this CMAP report, will put the Museum on the right track to ensuring that its activities are in line with currently accepted standards and will actively engage the staff in improving current activities throughout all areas of the museum.

The Museum should also consider purchasing many of the publications listed at the end of this report in order to have a professional resource library for staff.

C. Acquisition and Accessioning

The Museum receives approximately 99% of its gifts as donations while 1% is purchased. According to the Museum’s Self-study, 90% of the collections have been accessioned, 90% have documented title, and 85% have been cataloged. The Museum’s Archives Collections Policy states that acquisition will take place via “Solicitation” and “Acceptance,” while the Museum’s Guidelines for Exhibitions and Acquisitions includes “Donations/purchases.” Only the latter discusses the necessary approvals needed for acquisitions.

Good collections management procedures are listed as one of the Museum's goals for this CMAP. As such, the Museum should include the following information regarding accessioning in a collections procedural manual (for more information, refer to chapter two of the *NPS Museum Handbook*, Part II):

- Methods of acquisition (gift, purchase, exchange, transfer, etc.) and the steps to ensure proper transfer of title
- How are accessions tracked (The Museum should use PastPerfect to track all accessions whether they are part of the fine arts or archival collections)
- What paperwork is necessary for each accession (The Museum should create one Deed of Gift and determine which staff member has responsibility for this paperwork. Keep in mind that a donation requires intent to donate which may be verbal or written and should include a signed Deed of Gift, and acceptance by the organization which should be in the form of a Thank-you letter)
- Who is responsible for accepting and approving donations and what are the steps involved
- Assign each donation an accession number (The Museum currently uses separate accession numbering systems for its collections. These systems are based upon a collections size and whether or not it is archival, artifact, or fine arts. These numbering systems should be combined with each donation assigned the next number within the sequence. Example: first the Museum receives a donation of manuscript materials that is assigned 2009.01, they then receive a donation of fine arts and archival materials which would become 2009.02 and so on. Each item within a donation would then receive its own object identification number. For instance, the archival collections contained in 2009.02 would have the object ID of 2009.02.001 and the fine arts would be 2009.02.002, 2009.02.003, etc. The Museum may wish to continue using the letters that it currently has implemented to clearly identify under which category a certain object falls)
- How will the Museum address materials identified as Found in Collections

D. Deaccession and Disposal

The Museum does not currently have a deaccession policy in place, although it recognizes the need for one. This policy should be included in the newly created Collections Management Policy and should contain the information listed above under the Collections Management heading. The Museum has not identified any materials that it feels require deaccessioning. However, once the Museum has created its new CMP and reviewed its collections' scope, it may find that some materials within its collection are no longer relevant. Steps to deaccession these materials should be taken if this is determined.

E. Loans

The Museum acquires loan items through its temporary and traveling exhibits. In addition, many materials are currently "on deposit" but do not have proper loan documentation in place. The Museum also lends materials to other institutions for use in exhibits and other programs. It is important that the Museum have policies in place regarding incoming and outgoing loans, the proper forms to be used for each, and who has authority for approving these loans. In addition, the Museum should have current loan documentation in place for all collections it considers to be "on deposit." This will avoid confusion later regarding ownership and status of collections as well as insurance issues that may also arise.

F. Legal Issues

Of particular interest to the Museum's collections is the issue of copyright. Given the recent creation of most of the Museum's collections, many materials may still be under copyright, and there are likely items in the collection for which the Museum may not own the copyright. The Museum's CMP should contain information on how the Museum ensures that it holds legal and unencumbered title to materials within its collections. As stated under the Acquisition and Accessioning section of the report, a Collections Procedural Manual should be created that outlines the necessary steps staff should take to determine title, copyright, etc. For more information on the importance of obtaining copyright or permission to use materials, consult Appendices 13 and 14.

G. Safety as It Relates to the Collections

The Museum's collections pose no real threat to the safety of the collections or staff. However, because many of the Museum's on and off-site storage areas are not properly utilized; there are trip and fall hazards in these areas. Proper use and organization of these areas will be addressed under section "L. Conservation" in this report.

H. Documentation

Up to this point, the Museum's archives and fine arts have recorded donations as if they were accepted into two separate organizations. Each section has its own way of recording donations and even uses separate Deeds of Gift forms. The staff uses a letter within the object identification number to delineate whether an item is part of the fine arts collection, large archives collection, small archives collection, artifact collection, etc. As a result, materials donated by the same individual may end up with several accession numbers depending on which category it falls into. The Museum can continue utilizing letters within the object IDs, however one accession number should be used for each donation even if it consists of several types of objects.

In addition to the permanent collections, the Museum also has a collection of "use" materials that were acquired specifically for use in its exhibits. The Museum has done an excellent job of numbering these materials in a manner that clearly identifies them as part of the exhibits collection. Since these materials are not part of the Museum's permanent collection, they do not have to be treated with the same care as the Museum's archival or fine arts collections. However, records should be maintained for these materials.

Currently, the Archivist is responsible for all paperwork related to the archival collections and the Head of Education is responsible for all paperwork related to the fine arts collection and loans. These records are maintained in the responsible staff members' respective office area. The Museum should strive to have a signed Deed of Gift along with a copy of the signed Thank You letter filed for each donation it receives. It is important that all staff members are aware of who maintains all collections-related documentation, their appropriate storage locations, and the types of materials to be kept. Once the Museum has determined if it wishes to implement new accessioning procedures, it should determine who will be responsible for maintaining all accession records, signing documents and sending thank you letters, and where these records will be kept. Having one staff member in charge of these procedures will simplify the accessioning process and help to begin stream lining the Museum's collections management procedures. The administration, Board, and staff have expressed interest in one day hiring a Curator of Collections, and these duties would fall under that staff member. Until the funds are secured to hire this staff person, the museum must determine who will be responsible for what documentation activities.

Proper training of staff on how to handle collections documentation is also very important. The American Association for State and Local History offers an online course titled "The Basics of Archives." This course is inexpensive and should be required for all archival staff that deals with processing and cataloging, even if it is just used as a refresher course for those who have prior training and years of archival experience. The Museum should also consider having the Archivist and Head of Education attend AAM's online webinar on "Collections Conundrums" to better assist in their understanding of the problems and solutions associated with various collections documentation activities.

I. Backlog

The Museum has a manageable backlog of materials that need to be inventoried, cataloged, photographed/scanned, and properly stored. It is important that the Museum create a plan to tackle the backlog of collections. In addition, the Museum should focus on cataloging new collections as they come in to the organization. By keeping up on new donations, the staff will be less apt to lose intellectual control over the materials. In addition, they will not be adding to the current backlog of collections. Once the new donations have been properly cared for, they should then begin to work on the backlog. The Museum should continue using volunteers and interns to help with the backlog.

The Museum is currently using volunteers to transcribe the Oral History Collection. There is a sizeable backlog of recordings that need to be transcribed. The Museum should continue to utilize interns and volunteers to transcribe the interviews. In addition, the Museum may want to consider applying for a grant to hire temporary staff to transcribe these interviews. This is especially important for older interviews that were recorded on magnetic cassette tapes as this medium is extremely unstable and these interviews are at risk of being lost forever if they are not transcribed in the near future.

J. Inventory

The Museum does not currently conduct regular inventories. In addition, because of lack of staff to properly track locations, many of the fine arts materials do not have their current locations recorded in the collections management database. In addition, the Museum's archival collection records do not include home and/or temporary locations. It is important that the staff record current locations for all collections that have been cataloged in order to maintain physical control over the collections.

Before beginning an inventory process, the Museum first needs to number all rooms with a unique identifying number. Shelving units should also be numbered as well as individual shelves. For example, room 101 would have individually numbered shelving units with each individual shelf having its own number as well for a location that would be similar to "Room 101, Unit 1, Shelf A," "Room 101, Unit 1, Shelf B," etc. By doing this, each box/artifact will have a specific location. For materials stored in flat files, a location system would resemble "Room 102, Flat File 1, Drawer A," "Room 102, Flat File 1, Drawer B," etc. These locations would then become a part of the catalog record and should also be included in the Finding Aids and collections database records. The rooms, units, and shelves should be physically marked with the appropriate number to avoid confusion and misfiling.

Once locations have been created, it will be necessary to update existing catalog records and finding aids accordingly. Because the staff is extremely busy with processing collections,

assisting researchers, and other day-to-day duties, this would make a great project for volunteers and interns.

In addition to updating existing catalog records and finding aids, a volunteer or intern could also be used to create an inventory of the collections. For unprocessed/un-cataloged collections, a spreadsheet could be created that lists the Object ID, brief description of the item, and its location. This would give the Museum better intellectual and physical control over its collections. These spreadsheets will allow the staff to conduct periodic inventories as defined in the updated CMP.

K. Risk Management

The Museum's Emergency plan is fairly comprehensive, however it was last updated in January 2005, and as such has sections which are now outdated. In relation to its collections, the Museum should update the collections evacuation procedures. In addition, a list of local conservators and suppliers that can assist with collections recovery should be included. The staff should consult www.dplan.org when updating its emergency policies and procedures. dPlan is free, user friendly, and was created by the Northeast Document Conservation Center (NEDCC). The Museum should also conduct regular drills and should have the police and fire departments visit the site to gain a better understanding of their needs during an emergency.

The Museum should have an emergency supply kit and all other emergency supplies in a central location that is known to all staff and volunteers. Additional information on creating an emergency preparedness plan and the necessary supplies are contained in Appendices 15-20. The Museum should also consider attending one of AAM's online webinars related to disaster planning and preparedness.

L. Conservation

Most items in storage are housed in acid-free materials and the majority of collections are stored on museum quality compact shelving. An exception to this is unprocessed collections and the Museum's oversized materials.

Because of a lack of storage space, the Museum's fine arts collections receive the least amount of care. Most of the fine arts collection is stored within various rooms throughout the Museum's main building. Other pieces along with loan items and traveling exhibits are stored at an off-site storage facility. This facility was not created for museum storage, and is used by many other individuals, although the Museum does currently have two dedicated spaces which are not shared with anyone else. Pieces that are in storage are not stored according to accepted museum standards.

The Museum should reorganize its on-site storage areas as there are education and exhibit supplies stored along with collections materials. Collections items should be stored in their own dedicated spaces. The Museum should determine which areas would be best used for supplies and which would be best used for collections and create a plan to move the materials to the newly dedicated spaces.

The Museum is quickly running out of shelf space for its archival collections. In addition, a portion of archival materials are stored in an unlocked closet in the exhibit areas. This

space is also used to store various materials. The Museum should consider applying for an IMLS Conservation Project Support grant in order to gain funding for new shelving.

The main storage problem affecting the Museum is the lack of a dedicated off-site storage facility. The Museum recognizes the need for such a facility, but currently lacks the funding to fulfill this need. The Museum should continue to search for a facility that will meet its needs. In addition, the Museum may want to consider contacting other local cultural institutions and assess their need for additional storage. It may be feasible for the Museum to partner with any such organizations in obtaining a storage facility. For additional information on planning for a museum storage facility, please see Appendices 21 – 22.

The Museum does not have an Integrated Pest Management (IPM) plan in place. The staff stated during the site visit that this is not necessary as they have never had any problems with pests in the past, and that sticky traps are utilized when pests are noticed. For good collections care, it would be beneficial for the Museum to implement a permanent IPM. This can be done by purchasing sticky traps at the local grocery or hardware store and placing them on the floors within the storage rooms. The traps should be checked weekly to monitor for pest activities.

These are all stop-gap measures that the Museum should implement to help with the current situation. When the Museum acquires an off-site storage facility, it should ensure that the building is temperature and humidity controlled.

Recommendations:

- **Creation of a comprehensive collections plan that includes archival and fine arts collections initiatives**
- **Merge collections policies and procedures for archival and fine arts collections into one comprehensive document**
- **Creation of a new, comprehensive collections management policy**
- **Consider enrolling in AASLH's StEPS program to better assist the Museum in preparing for reaccreditation**
- **Purchase publications related to collections stewardship for the creation of a professional reference library for use by staff and Board**
- **Creation of a collections procedural manual to streamline the Museum's acquisition procedures**
- **Determine a more manageable numbering system for accessions and objects alike**
- **Create a deaccession policy as part of the overall collections management policy**
- **Review collections for deaccession potential**
- **Utilize loan documents for all items currently "on deposit" at the Museum**
- **Determine which collections the Museum does not currently hold copyright to and follow through with the necessary steps to obtain copyright or permission to use**
- **Determine appropriate staff member(s) to handle collections documentation**
- **Hire a Curator of Collections when funds permit**
- **Look into inexpensive online webinars and workshops sponsored by AAM and AASLH to provide staff with additional collections management training**

- **Focus on cataloging newly acquired materials to avoid adding to the current backlog**
- **Consider using volunteers/interns to assist with cataloging backlogs**
- **Conduct regular emergency drills**
- **Update emergency procedures and include information on local conservators and those who can assist with collections recovery**
- **Reorganize on-site storage locations so they are dedicated solely to supplies or collections**
- **Look into applying for an IMLS grant to acquire funding for archival shelving**
- **Continue to seek off-site storage solutions**

Administration and Finance

A. Staff

The archival staff consists of the Head of Archives, Archivist/Oral History Project Administrator, and an Archives Assistant (part-time position), while the education staff is managed by the Head of Education. The Curator of Collections position became vacant in 2012, and due to budget constraints, the position remains vacant. The Head of Archives is responsible for the oversight of all archival personnel as well as formulation and implementation of all departmental policies and procedures, acquisition and processing of archival collections, and maintenance of the Museum's computer infrastructure. The Archivist/Oral History Project Administrator is responsible for planning, developing, directing, and administering the international component of the Museum's oral history program as well as support for day-to-day operations of the archives. The Archives Assistant's main duty is the contact of potential oral history interviewees, collection of interviewee data, and cataloging of oral history transcripts. The Curator of Collections is responsible for selection and installation of temporary exhibits, creation of educational programs for special exhibits, preparation of condition reports and examination of incoming exhibitions among other duties. Since the departure of this staff member, these responsibilities have fallen on the Head of Education. The Head of Education's normal duties consist of the creation of programming partnerships with local schools and organization of quarterly workshops and conferences. The Archives and Education department also utilize volunteers and interns to assist with cataloging, records filing, and collections movement.

In addition to these staff members whose duties are directly related to the care and management of the Museum's collections, the VP of Institutional Programs oversees all archives and education department activities. Activities related to facilities management including monitoring of all environmental controls and basic housekeeping is overseen by the Building and Grounds Superintendent.

The Museum does a wonderful job of enabling its staff members to attend pertinent professional development programs. The majority of senior-level staff members have attended the Getty Information Museum. Other staff members are encouraged to attend conferences at the national and local level as well as workshops and other professional development activities. The Museum should continue this level of support and seek additional opportunities for its staff to continue to grow professionally.

The Museum should continue to utilize volunteers and interns to assist with collections management activities until the Museum has additional funds to hire pertinent staff. The

Museum should create a procedural manual for all volunteers and interns that outlines their duties, cataloging and other collections management procedures, and to whom they report. This manual along with extensive training in the collections area in which they will be working should be given to the volunteer/intern prior to beginning work on any project. In addition, when funds become available the Museum should consider hiring the following additional staff members in the order listed:

1. Curator of Collections
2. Curator of Exhibits
3. Website Content Manager
4. Registrar
5. Additional Archives Assistants

B. Finance

The Museum's budget for 2013/2014 calls for \$2,345,567 in income and \$3,210,000 in expenditures (\$1,234,567 of which is allocated for staff salaries and benefits). The Museum receives \$650,000 annually from the City of Port City, and the Administration and Board are confident that this fiscal support will continue without interruption. The Museum does not have a line-item dedicated to collections care; however it did spend \$255,747 in 2008 and \$234,567 in 2010 on "Cultural and Conservation" endeavors. Given the size of the Museum's collections, this budget is inadequate to properly care for the materials. When questioned about the lack of a specific allocation of funds for collections care, the Director explained that the Museum operates its budget similar to that of a family. For example, the Museum budgets a certain amount of funds each year for expenditures. The allocation of these expenditures may change throughout the year as various departments' state their needs. These needs are prioritized and funds allocated accordingly. This method seems to work for the Museum and staff members did not express any discontent with the methodology.

In addition to increase staffing, a major concern for the Museum is the acquisition of an additional building for storage. The Board should work to obtain funding for this endeavor through a capital campaign, donations, and/or grants. The Executive Director has a good idea of the major foundations within the region that support historical agencies, and the Museum has a proven track record of raising funds and successful grantsmanship. The Museum should continue to seek out additional funding sources along with the assistance of the members of the Board.

At one time, the archives department had a program in place for the cultivation of a "friends group," the additional funds from which were allocated towards the care of archival collections. Due to lack of support from the Development Department, this program has recently become inactive. This type of program has been successful for many organizations, and the Museum should research these programs for inspiration in the re-implementation of their own. The administration should encourage the Development Department to work with the Archival Department in the creation and implementation of such a project. For additional information, please refer to Appendix 23 and the following websites:

Adopt an Artifact Programs:

- IMLS & Heritage Preservation's *Capitalize on Collections Care*: <https://www.heritagepreservation.org/PDFS/COClo.pdf>
- Chicago History Museum: <http://www.chicagohs.org/support/adopt>

- Buffalo and Erie County Historical Society: http://www.bechs.org/support/adopt_an_artifact.htm
- Orange County (NC) Historical Museum: <http://www.orangenchistory.org/adopt.htm>
- Old Red Museum: <http://www.oldred.org/adopt.html>
- Penn Museum: <http://www.penn.museum/adopt-an-artifact.html>
- Williamson County Historical Museum: http://www.williamsonmuseum.org/WCHM_adopt_an_artifact_form.pdf
- Mel Fisher Maritime Museum: <http://www.melfisher.org/adopt.htm>
- William McKinley Presidential Library & Museum: <http://www.mckinleymuseum.org/donations>
- North Carolina Museum of History: <http://www.ncmuseumofhistory.org/adoptanartifact/index.html>
- The Bostonian Society: <http://www.bostonhistory.org/?s=librarymuseum&p=adopt>
- Winona County Historical Society: <http://www.winonahistory.org/AARR/>
- Kansas City Museum: <http://www.friendsofkansascitymuseum.org/museum/nativeamericanartifacts/>

Friends Groups:

- Baltimore Museum of Art: <http://www.artbma.org/friends/>
- Newark Museum: http://www.newarkmuseum.org/museum_pages.aspx?id=368
- Museum of Fine Arts, Boston: <http://www.mfa.org/members/index.asp?key=95>
- Museum of New Mexico Foundation: <http://www.museumfoundation.org/friends.html>
- The Museum of Modern Art: http://www.moma.org/support/support_the_museum/affiliate_groups/index
- The Nelson-Atkins Museum of Art: <http://www.nelson-atkins.org/support/MembershipLevels.cfm>
- The John and Mable Ringling Museum of Art: <http://www.ringling.org/Support2.aspx?id=176>

C. Facilities

The Museum's collections are currently housed within the organization's main building as well as two off-site storage spaces. The main building functions as staff headquarters, exhibition space, archival, library, and fine arts storage, programming space, and as a research facility. The building adequately fulfills most of these functions; however, as stated before, the Museum is in need of additional storage space.

The main issued faced by staff in the main building is occasional flooding and roof leaks. The staff is working on fixing these issues, and has completed about 2/3 of the work necessary to alleviate these problems. The staff should be sure to not store collections-related materials (storage materials or collections) in areas that are currently prone to these types of damage.

The Museum desperately needs additional space for storage, processing, and conservation of its collections. This should be one of the main focuses of the Board over the next three years.

D. Safety and Security

The Museum has done an excellent job in ensuring that its collections, buildings, and staff are safe and secure. All guests are asked to sign-in, and all staff (permanent and contract) must wear badges indicating their status. The staff noted during the site visit that the current disaster plan is still a work in progress and that the staff still needs additional training as it relates to the Museum's plans and procedures. The Museum should continue to update their disaster plan and conduct routine drills for the various types of emergencies they may encounter. A complete disaster plan is one of the required documents for accreditation.

The Museum has recently upgraded its security system and color video surveillance is in use throughout the facility. Staff has key-pad access to non-public entrances, and only key staff has access to keys for storage areas. The Museum stated in its self-study the desire to have security staff at all entrances and exists as well as in its parking facilities with the eventual installation of metal and bomb detectors at its entrance points. Although these additions are not fiscally possible in the near future, the Museum has done a great job of mitigating risk with its current security system. The Museum should consider obtaining additional funding for metal detectors and additional security personnel.

Currently, the Museum does not store its collections documentation in an off-site location. However, these documents are stored within fireproof cabinetry. The Museum should work to create duplicate copies of all collections related documentation and place them in storage along with other institutional records.

Recommendations

- **Continue to promote staff attendance at conferences, workshops, and other professional development activities**
- **Continue utilizing volunteers and interns for collections management activities**
- **When funds become available, hire additional staff including Curator of Collection, Curator of Exhibits, Website Content Manager, Registrar, and additional Archives Assistants**
- **Continue to seek additional funding for collections management activities**
- **Work with the Development Department to re-implement the Archives Department's friends group**
- **When funds are available, purchase metal detection equipment and hire additional security staff**
- **Create duplicates of all collections documents and store them in an off-site location**

Governance

The Board of Directors of the Port City Social History Museum consists of twenty-seven members who are leaders within civic, corporate, educational, non-profit, and grassroots organizations throughout the community. The Board is unique in that it is self-perpetuating, meaning that current Board members select new members rather than the selection and cultivation by the Executive Director. The Port City City Council approves all Board appointments, and members serve for three year terms with no director serving more than six consecutive years. The Board and administration are pleased with the way this method has and is currently working.

The Board is well aware of the needs of the Museum as they pertain to obtaining an off-site storage facility. In addition, the Board is aware of its fiduciary responsibility towards the Museum as a whole and the collections specifically. Despite this, the Chairman of the Board acknowledges the need for better education of the Board as it relates to heightened awareness of the needs of the collection. This education will continue to take place via full-Board orientations each year. The Board is also well aware of the outside influences that effect the Museum's finances, attendance, and collections. In addition, the Board fully supports the continued education of its staff.

It would be beneficial to include information on the Board's responsibilities as trustees of a non-profit organization in the Board orientation. A packet with additional information would be a good item to give all Board members so that they can readily refer back to the documents to help resolve any questions they may have regarding their responsibilities. In particular, Board members should be given copies of pages 3-15 and pages 60-67 from *Museum Governance: Mission, Ethics, Policy* by Marie Malaro.

Recommendations

- **Create a Board workgroup to look into the needs and realities of obtaining an off-site storage facility**
- **Educate the Board during orientation to their roles and responsibilities as they relate to collections**
- **Equip Board members with a packet containing pertinent information regarding their duties as trustees so that they can have this as a ready access guide.**

Summary

The Port City Social History Museum has accomplished a lot in its 18-year history. Despite its many accomplishments, the Museum is facing many of the same issues faced by other historical organizations throughout the country – understaffing, lack of storage space, and need for additional funds. To its credit, the Board, administration, and staff are all well aware of the Museum's needs and shortcomings, and are not afraid to state these aloud. The Museum's educational programs and exhibits are exemplary and its archival and fine arts collections directly reflect the Museum's mission. Because it is up for reaccreditation in 2018, it is important that the Museum focus on collections management and care activities. The main needs include the creation of a comprehensive collections management policy, creation of a collecting plan, better arrangement of on-site storage areas, and the procurement of a dedicated off-site storage facility. Other goals include obtaining additional staff members to better care for its collections and finishing the disaster plan.

Recommendations

The following short-term goals should be finished within the next year that require little monetary obligation on the part of the Museum. However, these steps may be time consuming for staff and the Museum should plan accordingly to allow the staff time to complete these objectives:

- Addition of goals related to use, care, and development of collections; marketing and public relations; programming; and exhibitions to the current strategic plan
- Creation of a Board level Collections Committee to deal with collections management decisions
- Creation of short, medium, and long-range goals within the strategic plan

- Creation of a collections plan to guide staff in collections management activities
- Feature the human rights elements of the Museum more prominently on its website
- Highlight human rights initiatives in Institutional brochures
- Create and implement a housekeeping plan for the care and upkeep of the Museum's exhibits
- Research proper cleaning methods for artifacts displayed in open areas
- Lower light levels throughout the exhibits to acceptable levels for the types of materials on display
- More actively promote the Museum's own traveling exhibition program
- Utilize guest curators for temporary exhibits until a Curator of Exhibits can be hired
- Create a brochure dedicated to the promotion of the Museum's archives
- Add scans of archival materials to the Museum's website, specifically on the archives pages
- Ensure that images on the Museum's website are properly credited
- Continue to seek marketing partnerships
- Seek additional unpaid advertising opportunities
- Continue to cultivate relationships with local and national media outlets for marketing purposes
- Create brochures and/or flyers to promote the Museum's permanent exhibits and special exhibits and programs, and place these brochures throughout local hotels and interstate rest stops
- Set aside funds to increase the Museum's paid marketing initiatives
- Creation of a comprehensive collections plan that includes archival and fine arts collections initiatives
- Merge collections policies and procedures for archival and fine arts collections into one comprehensive document
- Creation of a new, comprehensive collections management policy
- Consider enrolling in AASLH's StEPS program to better assist the Museum in preparing for reaccreditation
- Creation of a collections procedural manual to streamline the Museum's acquisition procedures
- Determine a more manageable numbering system for accessions and objects alike
- Create a deaccession policy as part of the overall collections management policy
- Utilize loan documents for all items currently "on deposit" at the Museum
- Determine appropriate staff member(s) to handle collections documentation
- Focus on cataloging newly acquired materials to avoid adding to the current backlog
- Consider using volunteers/interns to assist with cataloging backlogs
- Conduct regular emergency drills
- Update emergency procedures and include information on local conservators and those who can assist with collections recovery
- Continue utilizing volunteers and interns for collections management activities
- Create a Board workgroup to look into the needs and realities of obtaining an off-site storage facility
- Educate the Board during orientation to their roles and responsibilities as they relate to collections
- Equip Board members with a packet containing pertinent information regarding their duties as trustees so that they can have this as a ready access guide.

The Museum should plan to finish the following mid-term goals within the next three to five years, although they should begin as soon as possible to allow for a timely completion:

- Continue to expand marketing initiatives to highlight non-African American collections, exhibits, and programs
- Conduct visitor surveys and focus groups to gain a better understanding of the needs and wants of the local community as they relate to public programming and exhibitions
- Continue to create educational programs that utilize materials from the collections and incorporate reproduction and duplicate materials in its programs
- Bring in temporary exhibits that focus on international human rights issues
- Work with local school and universities to create research projects that make better use of the Museum's archival collections
- Purchase publications related to collections stewardship for the creation of a professional reference library for use by staff and Board
- Review collections for deaccession potential
- Determine which collections the Museum does not currently hold copyright to and follow through with the necessary steps to obtain copyright or permission to use
- Look into inexpensive online webinars and workshops sponsored by AAM and AASLH to provide staff with additional collections management training
- Reorganize on-site storage locations so they are dedicated solely to supplies or collections
- Look into applying for an IMLS grant to acquire funding for archival shelving
- Hire a Curator of Collections when funds permit
- Continue to promote staff attendance at conferences, workshops, and other professional development activities
- Continue to seek additional funding for collections management activities
- Work with the Development Department to re-implement the Archives Department's friends group
- Create duplicates of all collections documents and store them in an off-site location

The following long-term goals should be explored immediately, with an overall goal to complete them within the next five to ten years:

- Research the needs and possibilities of obtaining an additional facility in order to properly care for the Museum's rich collections and better serve its audience
- When funds become available, hire additional staff including Curator of Collection, Curator of Exhibits, Website Content Manager, Registrar, and additional Archives Assistants
- When funds are available, purchase metal detection equipment and hire additional security staff

Resources

Mission and Planning

Publications:

Gardner, James B. and Elizabeth E. Merritt. *The AAM Guide to Collections Planning*. American Association of Museums, 2004.

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Interpretation

Publications:

Falk, John and Lynn Dierking. *Learning from Museums: Visitor Experiences and the Making of Meaning*. American Association for State and Local History, 2000.

Freeman, Tilden. *Interpreting Our Heritage*. University of North Carolina Press; 3rd edition (June 1977).

Grinder, Alison and E. Sue McCoy. *The Good Guide: A Source for Interpreters, Docents and Tour Guides*. Ironwood Publishing, 1985.

Hirsch, Joanne S. and Lois H. Silverman. *Transforming Practice: Selections from the Journal of Museum Education 1992-1999*. Museum Education Roundtable, 2000.

Pugh, Mary J. *Providing Reference Services for Archives and Manuscripts (Archival Fundamentals Series II)*. Society of American Archivists, 2005.

Roberts, Lisa C. *From Knowledge to Narrative: Educators and the Changing Museum*. Smithsonian Institution Press, 1997.

Sachatello-Sawyer, et al., eds. *Adult Museum Programs: Designing Meaningful Experiences*. AltaMira Press, 2002.

Serrell, Beverly. *Exhibit Labels: An Interpretive Approach*. AltaMira Press. 1996.

Sheppard, Beverly. *Building Museum & School Partnerships*. American Association of Museums/Pennsylvania Federation of Museums & Historical Organizations, 2000.

Task Force on Professional Standards, Standing Professional Committee on Education (EdCom) *Excellence in Practice: Museum Education Principles and Standards*. American Association of Museums, 2005.

Collections Stewardship

Publications:

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Collections Link: <http://www.collectionslink.org.uk/>

Conserve O Grams:

http://www.nps.gov/history/museum/publications/consveogram/cons_toc.html#collectionpreservation

dPlan™: <http://dplan.org/>

LYRASIS Disaster Assistance: <http://www.lyrasis.org/Preservation/Disaster-Resources/Disaster-Assistance.aspx>

National Park Service Museum Handbook Part I: Museum Collections:

<http://www.nps.gov/history/museum/publications/MHI/mushbkl.html>

National Park Service Museum Handbook Part II: Museum Records:

<http://www.nps.gov/history/museum/publications/MHII/mushbkII.html>

National Park Service Museum Handbook Part III: Museum Collection Use:

<http://www.nps.gov/history/museum/publications/MHIII/mushbkIII.html>

Northeast Document Conservation Center: <http://www.nedcc.org/home.php>

Administration and Finance

Publications:

Brophy, Sarah S. *Is Your Museum Grant-Ready? Assessing Your Organization's Potential for Funding*. American Association for State and Local History, 2005.

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Governance

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Malaro, Marie C. *Museum Governance: Mission, Ethics, Policy*. Smithsonian Institution Press, 1994

Characteristics of Excellence for U.S. Museums

Public Trust & Accountability

- The museum is a good steward of its resources held in the public trust.
- The museum identifies the communities it serves, and makes appropriate decisions in how it serves them.
- Regardless of its self-identified communities, the museum strives to be a good neighbor in its geographic area.
- The museum strives to be inclusive and offers opportunities for diverse participation.
- The museum asserts its public service role and places education at the center of that role.
- The museum demonstrates a commitment to providing the public with physical and intellectual access to the museum and its resources.
- The museum is committed to public accountability and is transparent in its mission and its operations.
- The museum complies with local, state, and federal laws, codes, and regulations applicable to its facilities, operations, and administration.

Mission & Planning

- The museum has a clear understanding of its mission and communicates why it exists and who benefits as a result of its efforts.
- All aspects of the museum's operations are integrated and focused on meeting its mission.
- The museum's governing authority and staff think and act strategically to acquire, develop, and allocate resources to advance the mission of the museum.
- The museum engages in ongoing and reflective institutional planning that includes involvement of its audiences and community.
- The museum establishes measures of success and uses them to evaluate and adjust its activities.

Leadership & Organizational Structure

- The governance, staff, and volunteer structures and processes effectively advance the museum's mission.
- The governing authority, staff, and volunteers have a clear and shared understanding of their roles and responsibilities.
- The governing authority, staff, and volunteers legally, ethically, and effectively carry out their responsibilities.
- The composition, qualifications, and diversity of the museum's leadership, staff, and volunteers enable it to carry out the museum's mission and goals.
- There is a clear and formal division of responsibilities between the governing authority and any group that supports the museum, whether separately incorporated or operating within the museum or its parent organization.

Collections Stewardship

- The museum owns, exhibits, or uses collections that are appropriate to its mission.
- The museum legally, ethically, and effectively manages, documents, cares for, and uses the collections.
- The museum's collections-related research is conducted according to appropriate scholarly standards.
- The museum strategically plans for the use and development of its collections.
- Guided by its mission, the museum provides public access to its collections while ensuring their preservation.

Education & Interpretation

- The museum clearly states its overall educational goals, philosophy, and messages, and demonstrates that its activities are in alignment with them.
- The museum understands the characteristics and needs of its existing and potential audiences and uses this understanding to inform its interpretation.
- The museum's interpretive content is based on appropriate research.
- Museums conducting primary research do so according to scholarly standards.
- The museum uses techniques, technologies, and methods appropriate to its educational goals, content, audiences, and resources.
- The museum presents accurate and appropriate content for each of its audiences.
- The museum demonstrates consistent high quality in its interpretive activities.
- The museum assesses the effectiveness of its interpretive activities and uses those results to plan and improve its activities.

Financial Stability

- The museum legally, ethically, and responsibly acquires, manages, and allocates its financial resources in a way that advances its mission.
- The museum operates in a fiscally responsible manner that promotes its long-term sustainability.

Facilities & Risk Management

- The museum allocates its space and uses its facilities to meet the needs of the collections, audience, and staff.

- The museum has appropriate measures to ensure the safety and security of people, its collections and/or objects, and the facilities it owns or uses.
- The museum has an effective program for the care and long-term maintenance of its facilities.
- The museum is clean and well-maintained, and provides for the visitors' needs.
- The museum takes appropriate measures to protect itself against potential risk and loss.