

CONNECTING TO COLLECTIONS

A Statewide Planning Proposal for Virginia

The Virginia Association of Museums (VAM) is partnering with the Library of Virginia, the Mid-Atlantic Regional Archives Conference, the Virginia Conservation Association, and the Virginia Department of Historic Resources on a project to address the needs in conservation and collections care identified by the Heritage Health Index study of 2005. This collaborative planning effort also involves concerned curators from individual museums such as the Virginia Historical Society, the Richmond History Center, Morven Park and the Manassas Museums system.

NEED AND RATIONALE

The many needs discovered during the Heritage Health Index (HHI) survey of our nation's historic and cultural resources came as no surprise to those museum service organizations in the states tasked with providing technical assistance to museums and historic sites. There were 77 Virginia institutions included in the HHI survey, and while this represents but the tip of the iceberg of Virginia institutions the findings accurately reflected the picture as we know it. To confirm this assumption, the project team conducted a brief survey in September 2008 with questions on collections care needs going out to museums, libraries and archives (see Support Document **(SD) 1**).

The four recommendations of the HHI report are all valid and important. However, our team has chosen to address three of the four in this planning grant proposal:

1. The provision of safe conditions for collections
2. The development of an emergency plan
3. The marshalling of public and private support for and raise public awareness about collections care

Of these, the third – marshalling support for collections care – was deemed to be our top priority, and as such will be the biggest budgetary focus. Without both internal (board, staff, volunteers, members) and external (funders, government, community leaders, general public) understanding of why conservation and preservation are so critical, it is difficult for any institution to get support for dedicating the necessary financial and human resources to address the needs. To address the backlog of conservation needs will take significant funding, and that funding will not be forthcoming unless the case can be well and truly made. In the September 2008 survey of collections care needs, 33% reported no funding in the annual budget for conservation/preservation of the collection, and 30.8% reported a budget of less than \$3,000 for this purpose.

The fourth recommendation of the HHI report, that collecting institutions need to assign responsibility for collections care, is an issue that is currently addressed through the extensive workshop, seminar, conference and other professional development offerings of the partners. In our survey, 86.3% of respondents said they had at least one person responsible for the care of the collection. The primary concern in Virginia institutions is not that they are unaware of this professional standard but that funding does not support a separate position in many cases. It is hoped that increased commitment to conservation through an enhanced understanding will lead to the resources needed to address this fourth recommendation.

THE PLANNING PROCESS

Representatives of collections-holding organizations and those tasked to support them were called together on June 18, 2008 by the Virginia Association of Museums to begin discussing a Virginia application for the Connecting to Collections Statewide Planning Grant. (See first paragraph for list of project team agencies.) The group met roughly once monthly throughout the summer and early fall. There was a review of the 2007 state grant applications and a discussion of the goals of a Virginia application. Despite a lack of state-specific recent data (the last survey of public and private records repositories was in 1983, and there has not been a comprehensive survey of museum collections in that time), a consensus was quickly reached among the group that the findings articulated in the HHI report effectively represented the current situation in Virginia. All preferred to use this project to more directly address the recommendations rather than to repeat the survey. However, we determined to conduct a very brief “snapshot” version of the HHI (15 questions) to confirm that belief and to direct our planning efforts to make sure we were targeting correctly. VAM was chosen to be the lead applicant for the project and all were given assignments.

At the second meeting July 17, the survey instrument was discussed, current programs offered by VAM and other agencies were reviewed (**SD 2**), and goals were identified. The group brainstormed ways to address the three recommendations and discussed budget implications. It was decided to approach an outside marketing firm with ties to the museum community for ideas as to how to proceed with the raising of public awareness of collections issues. At the third meeting, August 20, the survey questions were approved, library and archive assessment programs were considered, a draft collections care mini-assessment was presented (**SD 3**), and a report was made on discussions with the marketing firm ToMarket in Richmond.

The survey was disseminated via the online SurveyMonkey site in early September. A link to the online survey was sent out to 700 museums, 71 archivists, and 500 libraries. While the vast majority of cultural organizations in Virginia have a staff person specifically assigned to care of collections (88%), it is clear that most respondents to the survey felt that they needed more attention paid to those collections. A full 44% feel that their current collections storage area is only "adequate," and 55% feel that the biggest need related to their collection is improved storage. At the final meeting September 23, results from the survey were presented. The public awareness proposal from ToMarket was reviewed (**SD 4**), and a report was made on the trial Circuit Rider assessment completed by team members (**SD 5**).

One goal of the survey was to help the project team determine how best to provide assistance. 71% of respondents would like to see specific object-based training courses for conservation and preservation; but 51% and 58%, respectively, felt that helping them raise awareness with their board and the public and offering them technical assistance and mentoring would also be helpful. A full 42% of respondents felt that money was the one thing that would most assist them in better caring for their collections—a percentage that shouldn't be surprising, since 33% have no money to spend on collections care at all. As with the storage issue, we hope to address this need through the public awareness component of our planning grant.

From this information and the deliberations of the project team over the summer it was determined to seek statewide planning grant funding for the following initiatives:

- Safety of Collections: Circuit Rider pilot project; Collections Fundamentals Forum pilot project; and Library Education Outreach
- Disaster Preparedness: Complete System of Regional Museum Emergency Support Teams (MESTs); Lending Library and Online Resources; and Development of Disaster Plan Lockup statewide series.
- Marshalling of Public and Private Support: Strategic Communications Plan for Collecting Institutions

Safety of Collections

Circuit Riders. As part of the statewide planning grant, Virginia proposes to test a Circuit Rider collections assessment program through a pilot project with 10 institutions: five museums, three libraries and two archives. The purpose of this program will be to:

1. Help the museum determine readiness for a MAP or CAP,
2. Help the museum identify specific collections care issues, and
3. Help the museum set priorities for improving collections care.

A team of one museum curator (Jeanne Niccolls) and one archivist (TBD) will work with institutions based on their responses to our September 2008 Collections Care Survey (see **SD 6** for potential sites). They will use the mini-assessment checklist (**SD 3**) as a guide for the assessment; visits should take about four hours; discussion between the team members and preparing a short two-page report should take another four hours. The report will address general collections care needs (while the mini-assessment may require examination of other areas of museum operations, it is not intended to replace either a Collections MAP Assessment or a CAP Assessment, nor is it intended to provide conservation treatment for any items or an object-by-object survey). It will also identify up to ten prioritized actions the museum can take in the next one or two years and suggest resources to help the museum address these priorities. After the first five assessments (May-July 2009), the two team members will meet with the Project Team to evaluate progress and fine-tune the assessment if need be (August 2009). The remaining five assessments will take place in September-November 2009. The Circuit Rider team will meet with VAM staff in January 2010 to identify gaps in professional development

programs and outreach efforts. Together with staff from Library of Virginia and the Mid-Atlantic Regional Archives Conference, VAM will determine what resources may be available and design training to meet identified needs – both traditional and online programs. By looking at collections safety issues revealed, how they were addressed, and how successes were shared, the Virginia project team hopes to develop an ongoing Circuit Rider collections care assessment program in Virginia through the Implementation Grant phase.

Collections Fundamentals Forum. Almost three-fourths (71%) of our survey respondents indicated a need for training in collections care. To address this need, we will use some of the planning grant to plan a series of two-day workshops around the state (in anticipation of applying for an Implementation grant to follow). The two-day Collections Fundamentals Forum will be modeled after VAM's popular and successful three-day Museum Fundamentals Forum held every three years, but instead of addressing all aspects of museum administration it will focus on collections issues alone, and will include hands-on training in object conservation and preservation. Funds are sought for a consultant to develop a curriculum for the Forum and recruit faculty, and faculty stipends and expenses to hold a pilot project in June 2010.

Library Education and Outreach. Library project team members have reported that libraries have had little exposure to training or resources in archive or object collections care issues, and that collections care is not generally included in the curriculum of library science programs. In order to begin the process of raising awareness, provide useful information, and highlight available resources a booth will be taken at the annual conference of the Virginia Library Association, to be held in Williamsburg in October 2009. This will also present an opportunity to survey library personnel on perceived needs to help in determining appropriate topics for the Collections Fundamentals Forum.

Disaster Preparedness

Regional Museum Emergency Support Teams. Two years ago, VAM began the process of encouraging local groups of museum staff to organize Museum Emergency Support Teams (MESTs) as part of an overall Emergency Task Force (see **SD 7**). MESTs are groups of museum staff members organized by region or city who meet on a regular basis to learn about available resources and involve local emergency management officials; develop emergency procedures; determine resources for disaster recovery and coordinate those resources; offer disaster management training opportunities; set up communication methods for emergency support; and visit local sites to familiarize members with museum layout so that when an emergency occurs they are able to help. Currently MESTs exist in Richmond, Northern Virginia (Alexandria, Fairfax), and the Peninsula (Williamsburg to Hampton).

Interest has been expressed in other areas of the state, but there have not been sufficient staff or financial resources to actively engage other regions. Therefore, with a firm belief that these support teams are vital to effective emergency response, we will use some of the planning grant funding to finish the process of setting up teams throughout Virginia. The areas to be targeted are: Roanoke and the Blue Ridge; Danville and Southern Virginia; Fredericksburg and the Northern Neck; Abingdon and Appalachia; Shenandoah Valley (Lexington to Harrisonburg); and Hunt Country (Loudoun to Leesburg).

Lending Library and Online Resources. A review of the available materials on disaster planning and emergency management was made with an eye toward filling gaps in the VAM current lending library. Fifteen printed resources were identified for purchase (approximate cost \$400), plus eleven that were available for online download and printing (see **SD 8**). These resources will be used to assist museums, libraries and archives throughout Virginia and will be available free of charge as part of the lending library. (Some mailing costs may be charged if necessary.) A full list of these resources, plus additional resources available online including websites and downloadable information will be put on each partner's website.

Disaster Plan Lockup. Our survey revealed a relatively high percentage of respondents with disaster plans of some kind (79%). However, our goal should be that every museum, library and archive in the state has at least a basic emergency plan. To encourage this, a series of disaster plan templates will be developed for small, medium and large institutions (see **SD 9**). These templates will be used in the Implementation grant phase with a series of Disaster Plan Lockup workshops. Participants in a Lockup workshop will be "locked" into a classroom and will choose one of the templates to complete a disaster plan for

their institution before being “released” at the end of the day. Included in the planning grant request is funding for development of the templates as well as the development of a “pre-session” questionnaire. Participants will be asked to make sure they have completed the questionnaire and bring the answers with them for use in filling out the plan template (for example, local emergency phone numbers, list of resources, etc.).

Marshalling of Public and Private Support

Public awareness has two audiences: internal and external. So Many of the needs in collections care are related to a lack of knowledge, or understanding, of the importance of collections care issues. There needs to be a commitment on the part of museums and their internal audiences – board, staff, volunteers, even members – to elevate collections care to a priority for the organization. This means a commitment in the form of staff resources as well as financial resources. This priority needs to be communicated to the external audiences as well – donors, public and private funders, government agencies, elected officials and community leaders, and the general public. Raising public awareness and building public and private support for collections care is our primary goal for the IMLS Statewide Planning Grant.

VAM will approach this goal by developing a strategic communications plan that defines the message that will most effectively communicate the importance of collections care to our target audiences, and determines how best to get the word out to these groups. Aiding us in the development of this plan will be the Richmond-based marketing firm ToMarket, a well-respected firm with ties to the museum community. These marketing and public relations experts will capitalize on the skills and abilities that are housed with each institution. It is expected that the entire planning process will take six to nine months from inception. The development of the plan to help institutions raise awareness and money for conservation will:

- Be built from the ground up. Our plan will be built with input and ownership from the institutions via planning meetings and ongoing communications. The plan will feature tactics that can be easily executed and tailored to individual institution and market conditions.
- Feature a unifying statewide overlay of activity. An umbrella of statewide communications (eg: media relations campaign, direct mail, etc) will be developed focusing on our general goals
- Feature a central message. Resources will focus on creating a message that resonates with potential funding audiences to help them clearly understand the significance of collections care and the difference it makes in their lives and to their interests.
- Be easily accessible to users. Feature an online toolkit with templates, formatted content, FAQ’s, and other downloadable resources based on planning input.

The planning process will include three master planning sessions with representatives from as many institutions as can be gathered. Ongoing communications will occur via telephone and online vehicles, such as a blog. In this first session, ToMarket will develop planning parameters, get input as to expertise and abilities, learn about individual market conditions, and also include time for brainstorming. The second session will be a progress update and check-in point to build consensus for the planning initiatives and to confirm direction. The third session will be to present the final plan, to secure understanding and prepare the field for implementation. An implementation grant will be sought from IMLS as the second stage of this project.

PROJECT RESOURCES: BUDGET AND PERSONNEL (all resumes in Appendix)

Although all members of the project team and their organizations will be involved in the various planning grant activities, the Virginia Association of Museums has been selected by the project team to oversee project activities. This will involve the following staff:

Margo Carlock. Carlock has been VAM’s Executive Director for 15 years. During her tenure the Association has grown to the largest state museum association in the country. Prior to her work at VAM, Carlock worked for the State of Missouri and the U.S. Department of State in the Diplomatic Corps. She is a committee member for the Virginia Sesquicentennial of the Civil War Commission Coordination Working Group and Advisory Council, and chair of the National Alliance of State Museum Associations. Carlock will be overall project director, and will also have primary responsibility for working with ToMarket on public awareness.

Jennifer Weiskotten. VAM’s Program Director since September 2000, Weiskotten spearheaded the creation of the first professional certificate program offered by a museum association. Prior to arriving at VAM, she held positions at history museums in Virginia and New York. Weiskotten will work with the project team members on the development of the program aspects of the project: the Conservation Fundamentals Forum, the Circuit

Rider program, library outreach and the disaster plan workshops. Carlock and Weiskotten will share responsibility for initiating Museum Emergency Support Teams in designated areas.

Heather Widener, Publications Coordinator will be assisting in communications. Widener has been on contract with VAM since 2004 to produce their newsletter and manage their website, and also as a part time educational consultant. She was a teacher in both Maryland and Virginia schools prior to joining VAM. Widener will manage the website and communications aspects of the grant.

Jeanne Niccolls, retired Collections Manager for the Fairfax Park Authority, will head up the Circuit Rider project and will be one of the two team members. As a museum collections consultant, Niccolls provides assistance to small museums with collections care and management projects. She is a respected expert in procedures for collections stewardship, and has taught collections management as part of VAM’s Museum Fundamentals Forum. We will be recruiting an archivist to be the second team member. She will also develop the curricula for the Collections Fundamentals Forum, together with Weiskotten.

Melba Myers, principal of Melba Myers Conservation, LLC and retired state conservator with the Virginia Department of Historic Resources will develop the disaster plan templates and questionnaire. She has provided technical assistance on conservation principles/practices to professional and avocational archaeologists, other ancillary museum professionals, and the general public; and conducted public education and outreach activities for the state. An author of the DHR Disaster Recovery Plan, she has responded to museum disaster events around the commonwealth of Virginia.

ToMarket, a Richmond-based marketing firm, will develop the public awareness campaign with **Donna Ransone** as project leader. Ransone brings decades of marketing experience to the table. Her background includes marketing, public relations and advertising on both the agency and client sides, in health care, education, insurance, and more. She has been involved with not-for-profits for three decades, serving in many capacities. She is a trustee of The Richmond Ballet and the Valentine Richmond History Center (immediate past chair) and a graduate of the Leadership Metro Richmond Leadership Quest program. She served as president of the Richmond American Marketing Association and won the “Chapter of the Year” award for overall program and management excellence.

Budget

Budget figures are realistic and based on consultant proposals, Federal per diem rates (US General Services Administration), current IRS mileage rate and either actual or estimated mileage, and actual or estimated costs of materials and services. In-kind contributions (time) are being provided by the Project Team.

Sustaining the Planning Effort – the Project Team

The project team will continue to meet regularly throughout the planning grant period. We will jointly monitor the progress of the grant activities and provide input; however, each project team member will have specific responsibilities for working with the consultants and reporting to the group:

ORGANIZATION	NAME OF TEAM MEMBER(S)	ASSIGNMENT
Library of Virginia	Suzy Palmer, John Metz	Library Education, Lending Library
Department of Historic Resources	Dee Deroche	Disaster Plans
Mid-Atlantic Reg’l Archives Confer.	Catherine Obrion	Circuit Rider – archival/libraries
Virginia Conservation Association	Mary Andrews	Collections Forum
Virginia Historical Society	William B. Obrochta	Public Awareness
Richmond History Center	Suzanne Savery	Public Awareness
Morven Park	Tracy Gillespie	Circuit Rider - museums
Manassas Museum System	Roxanne Adams	Collections Forum

Long Term Benefits to the State

We have already seen the first long term benefit from this project: the coming together of these various statewide organizations to work on this project. The lines of communication we have opened will continue to grow and benefit all of us, enabling us to coordinate activities to better reach our overlapping audiences. We anticipate also that completion of these projects will begin to actually address the needs of Virginia in collections care, and in the process reveal areas for further attention.