

**Institutional Assessment
Sample Report
Museum Assessment Program
American Association of Museums**

“Moffett-Weigert” Museum

The purpose of this sample document is to help illustrate a sample report. The contents of this information shall not be substituted for, nor substantially used as the basis for, any document produced by the recipient. This should serve as a model only.

The AAM and its Museum Assessment Program, as a 501 (c) (3) nonprofit, tax-exempt organization, reflects, reinforces, and disseminates information on standards and best practices in the museum field. AAM has endeavored to make the information as accurate and current as possible. However, inadvertent errors can occur. Therefore, these materials are provided “as is,” without any guarantee or warranty of any kind, expressed or implied.

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 report follows the new writing guidelines and is excellent because it gives straight-forward advice for the objectives of a smaller institution. It carefully considers the limitations of staff, board, and budget and gives the museum ways to begin improving their overall functionality. Additionally, it does a fantastic job of prioritizing recommendations at the end.

Table of Contents

Executive Summary	3
Introduction	4
Brief History	5
Mission & Planning	6
Interpretation & Education	8
Collections Stewardship	10
Administration & Finance	12
Governance	15
Summary & Recommendations	17
Related Resources	19

Executive Summary

The Moffett-Weigert Museum (MWM) is the community history museum in Lilac Cove, Mississippi, operated by Historic Lilac Cove Mississippi, Inc. (HLCM), a private non-profit membership organization. HLCM has operated the museum as a public attraction since 1968, and occupies two buildings and the small park in which they sit. One of the buildings, referred to as The Moffett-Weigert Museum itself, is an historic structure built during the late-18th century, while the other building, known as the Rosen House (called “the Annex” by the board and staff), is a 20th-century former residence used as the HLCM offices, visitor center, library, and storage facility.

The HLCM board is deeply committed to seeing the museum grow and succeed as a useful and educational community resource, as it has for more than a quarter century now. Local residents attend programs and events at the site regularly, and the organization holds a variety of materials in its library to assist the public with research projects on local topics. Despite these advantages, HLCM faces numerous challenges in its attempts to set the museum operation on a firm financial, administrative, and professional footing. Many basic procedures are not in place, and the museum has already suffered at least one major incident of financial theft related to a lack of accountability, as well as the theft of collections objects from exhibit areas during a period of unsupervised public access.

The purpose of this report is to draw attention to these challenges, note the organization’s existing capabilities to address them, and to point out some of the logical steps needed to help HLCM move forward. Aside from operational setbacks related to the downturn in the national economy and a subsequent shortage of funding, which is a situation faced by the majority of museums in this country currently, the report will focus on other issues of basic museum “housekeeping,” which will require little or no money, but that will help to establish a sense of professionalism and some basic safeguards for the staff and the museum’s financial and historic resources alike. These issues include:

- Daily operation, security, and cash management procedures;
- A clearer sense of mission for the organization, including its role in the community;
- Aligning public programs and events both with this mission and with the capabilities of the staff and volunteers;
- The development of some basic collections policies and procedures for preserving and caring for artifacts as well as other museum resources.

Introduction

This report summarizes my findings after reviewing documents submitted by the staff of The Moffett-Weigert Museum including the MAP Application, their Self-Study Questionnaire, additional documentation provided, conversations with a consulting curator who worked with the staff during the past year, and a personal site visit on October 12, 2009. Through this program and the MAP process, it is intended that museum organizations will receive a significant review of and input on their operations, the quality of their offerings, and advice on ways in which they might become even more effective in serving their communities. This process strengthens and enriches all museums, and helps to provide a much more meaningful experience for the staff and the public alike.

The staff and HLCM board had bumped their regular board meeting back a bit so that it was being held on the day of my site visit; in fact, I arrived at the museum just after the meeting had gotten underway. This enabled me to meet with nearly all of the principal people involved in the organization at the same time, and the meeting's agenda included active discussion of some of the fundamental issues that HLCM faces, and which are addressed in this report. Following the board meeting, I met with the two part-time staff members separately, and toured the museum building, storage areas, and gift shop.

During preparations for this MAP review, AAM staff determined that the MWM had undergone a prior Institutional Assessment in 1989, of which the current staff was not aware. Since the focus of the institution has changed significantly since then, and other issues need to be addressed today, it was determined to proceed with this "Re-MAP" of the MWM. In their most recent application, the staff expressed the following three objectives as their most pressing needs this time around:

- Increase confidence and understanding of financial record keeping and create a system that will protect the museum in the future;
- Adapt the current mission statement to truly meet the institution's goals and vision;
- Implement effective institutional planning and strategy.

Brief History

Chartered in 1842, the town of Lilac Cove was established as a Mississippi River port from which agricultural and forest products could be gathered and shipped by local planters and merchants. The town's fortunes changed dramatically following the Civil War, which disrupted trade. Moreover, as planters shifted from cotton to grain during the last quarter of the 19th century, they sought larger ports with milling and bakery facilities as markets for their grain.

The Moffett-Weigert Museum occupies a small wood frame structure that is believed to date to the second quarter of the 19th century, when the town would have been at its peak as a port. Originally built as the vestry house for the Iris Church, the house was sold to Parson Mason Matteo Moffett in 1851. Trained as a minister, Moffett was also an itinerant bookseller, and used the house as his store and warehouse. Attorney James Weigert purchased the property in 1902 and served as his family's residence for the next seventy years, before being acquired by the Town of Lilac Cove.

In 1970, HLCM was incorporated, and began operating the former Moffett-Weigert property as a museum the following year. In 1996, the town formalized its relationship with HLCM through a "museum franchise ordinance" which was renewed and amended in 2002, and expires in 2038.

Mission & Planning

One of the chief objectives of this MAP process, as stated by the museum staff and board of the HLCM, is clarifying the organization's mission. By doing this, they hope to realign the programs, exhibitions, events, and other activities that the public is offered so that all museum activities support that mission. The staff and board are definitely on the right track, acknowledging the importance of a clear purpose for the organization, and wary of wasting resources on activities that do not make sense in light of that purpose, or given current fiscal and staffing constraints. During the site visit, board members expressed concern that the existing mission is too broad, but were unsure about how to proceed with fixing it.

The HLCM mission has evolved considerably, but could use continued thought and revision. When the organization was incorporated in 1970, their stated purpose was two-fold: "to gather and preserve historical facts about Lilac Cove" and "to encourage and participate in restoration and preservation of any historical building, site, artifacts, etc. associated with the history of Lilac Cove, MS." For a community historical society with three board members and a small initial membership, this was a tall order, but was no doubt fueled by enthusiasm for the Nation's Bicentennial just around the corner.

Between 1970 and 2000, the HLCM mission became much more specific, outlining how the organization would promote and encourage local history, "by the collection of books, documents, artifacts, photos and other cultural objects" and then sharing them with the public through the museum's programs, events, and research. Gone was the charge to restore and preserve buildings. Nevertheless, in 2000, the board changed the mission statement once again, boiling their purpose down to simply "preserve and protect the history of Lilac Cove and its environs."

A clear, concise mission statement is essential for any institution. It states why that institution exists, who it serves, and why it does so. It should express some of the uniqueness of the organization, and is shaped by those who benefit from it, as well. As the HLCM board and museum staff continue to revise their mission, they should bear in mind the museum's role in the community and how best they can meet a community need. It is critical to get community input during this process, and to ascertain how HLCM and the museum are perceived. It is also extremely important for the board and staff to make a realistic appraisal of what the museum offers the public, and is best equipped to provide in terms of services --- what kind, how often, and by whom. The mission is also a critical component in any planning process, serving as a roadmap to revise the interpretive focus of exhibitions, make changes to the annual program schedule, and justify the requests for grants or additional government funding for specific projects and new initiatives.

For example, a real strength of the museum's collection is its research files. While the library is small, and the amount of research assistance that the staff could offer on any given day may vary considerably, it seems that this is a resource that is unique to HLCM, and has tremendous potential. If the HLCM board feels that its true purpose lies in being *the* community history resource for the town, then they already possess the library to begin making that a reality, and should consider fostering research and historical scholarship as a major part of their mission. In

this way, long-range planning that supports this part of the mission would definitely include such things as an improved library facility, hiring a trained archivist or librarian, working with area schools and universities to promote independent research projects, and the continued acquisition of related print, photographic, and other historical materials that can push that scholarship forward. The mission reflects the purpose and the dream, and from the mission flows the planning and programming.

Lilac Cove is a small town and, for the foreseeable future, the museum will remain a small operation; the small staff will also be challenged with a limited ability to provide services to the entire community and its varied audiences. This does not mean, however, that those services can't be of the highest quality and meet those needs very well --- it requires, though, that the board and staff focus on those core services when thinking about their revised mission.

Recommendations:

- The HLCM board needs to solicit feedback from targeted segments of the community on the museum and its services, to help the board refine the mission. These segments should include all perceived local audiences and stakeholders, including ones that may not be well-represented among current visitors (such as African-American, Asian or Hispanic residents, teens, or the elderly), as well as school staff, government, and the business community.
- Following this information gathering process, the board and staff would hold a one-day “retreat” to discuss the mission only, and arrive at some consensus about what the HLCM and MWM are, who they serve, and how best the organization can fulfill this new mission and new identity.
- With a renewed sense of direction, the board contemplates where existing resources should be allocated during their next budget planning cycle, and determines what new sources of money should be pursued. The staff provides operational feedback, advising the board on the most pressing needs and priorities for achieving goals for the next fiscal year.

Interpretation & Education

Despite a variety of interpretive issues stemming from the need for a revised mission statement, the lack of an interpretive master plan, and very limited space, it is clear that the staff has put considerable effort into providing an entertaining and educational experience for visitors. The “please touch” table in the Annex visitor center is an excellent way to engage people right off the bat, and can be modified and utilized by an interpreter in any number of ways to talk about a wide array of topics. Exhibition cases in this same space (only one of which was lit) hold a variety of images and artifacts, though they are arranged without much of a theme or focus.

The MWM building’s history is a bit muddled, as far as an exact date and detailed building history, but would make an excellent and interesting research project for a volunteer or a grant-funded historic structures report. The building is divided up into four period rooms (two on the first floor, and two on the second), while a third holds exhibit cases that attempt to interpret everything from the late-19th century up to the modern era. The period rooms share space with the museum store, which occupies a rear addition. Guided tours are offered to the public on a regular basis, and the exhibit rooms are made available during special events, but not always supervised. Both staff and board members alluded to an “intimacy of the experience” afforded by the tours, and this is actually one of the great strengths of period room interpretations. The Annex has a ramp on the north end to provide disabled access into that building, but the MWM building is not accessible to those with mobility impairments, and there is likewise no program for those with any sort of sight or hearing disabilities.

The staff and HLCM board are divided in their opinions on the museum’s public programs. Some of them are quite successful, draw good attendance, and relate to the mission of the organization as it stands today. Others have little or nothing to do with local history but bring people to the site in numbers, which can have “second-hand” effects such as introducing people to the site, store sales, unexpected tours, etc. With a staff this small, nearly all public programs are very labor-intensive, which can easily lead to staff burn-out and a corresponding drop in morale.

Lilac Cove is a fairly small town, encompassing just 1.6 square miles, with a population of about 5,000 people. In racial and ethnic terms, 47.6% of the population is White, 35.3% Black, 13.1% Hispanic, with several other groups making up the final 4%. A significant proportion of these people are foreign-born (11.6%), with the largest percentage of these residents identifying Latin America as their place of origin. Just under three-quarters of residents hold high school diplomas or an advanced degree (71.6%), while a further 12.9% hold Bachelor’s degrees and above. These statistics indicate a fairly well-educated local population, but one which may not identify strongly with the early history of the region, or with the museum itself, its mission, or its resources. Board members acknowledged that there is a large, predominantly Black neighborhood in Lilac Cove, but noted that they had few contacts among residents of this area. While the museum’s visitation has increased significantly in recent years (+74% from 2007 to 2008), it can only improve with the additional involvement of area residents who are not now using the museum.

Fortunately, the town is located just off the interstate, approximately 30 miles south of Jackson, MS. This places the museum on a route used by many tourists, business travelers, and commuters on an annual basis. Despite this high volume of traffic, the surrounding area is largely rural, and the museum itself is several miles off of the highway. The museum has its own brown “cultural attraction” signs along the interstate, and directional signage, with an attractive wooden sign indicating where visitors turn into the quiet residential neighborhood where the museum is located.

In pre-visit documents, the staff mentioned local residents as well as out-of-town travelers as their audience, but this does not seem to be the case. While the town and museum are just a short trip off of the interstate, and thousands of cultural tourists pass the Lilac Cove exit daily on their way to and from Jackson, MS, there needs to be a compelling interest for them to get off there. By themselves, the stories of Matteo Moffett, James Weigert, and the town of Lilac Cove are not going to draw large numbers of national or international tourists to this historic site. This history holds a far greater appeal among local residents, who can appreciate the Lilac Cove story in a regional context as a port, a Civil War battleground, and a host of other local stories, large and small.

Recommendations

- With a revised and clarified mission in hand, along with a great deal of citizen feedback from that process, the board and staff will have a much better sense of the types of programs that support that mission. An emphasis on research, for example, could generate ideas for programs involving student projects, annual history awards, and other opportunities to recognize local historical scholarship.
- Seek out opportunities for new events or programs with an eye toward attracting a more diverse audience, as well. Even if they need to be held off-site for additional space, programs that appeal to traditionally under-served segments of the community can introduce them to the museum, its collections, and its interests. The most recent of the town’s ethnic populations still have a history there, and the organization will be well-served to let people know that their stories are valued, too.
- Find and train volunteers specifically to do outreach in local schools, especially the one within walking distance of the museum (Lilac Cove Elementary?). Offer an in-school program that uses local history examples to relate to national events that are important parts of the Mississippi Standards of Learning. The Social Studies SOLs alone contain many opportunities for the museum staff to work with children at a variety of ages and grade levels. Students participating in National History Day might find the resources of MWM to be helpful in choosing a topic or in conducting research.

Collections Stewardship

The HLCM and the MWM itself hold and care for a collection of thousands of artifacts, documents, books, and archival materials. The largest portions of the collection are historic artifacts and the print materials that make up the library/archival collection, but there are also significant numbers of archaeological items, furniture and decorative arts, and photographs. As mentioned above, exhibit cases in the Annex reception area and in one of the rooms in the MWM hold objects and photos arranged thematically. Guided tours of the period rooms in the MWM building lend a feeling of intimacy and provide context to the objects on view there, but can also pose security risks to those same objects.

All items are held in either the museum period rooms, in the Annex library, or in storage on the second floor of the Annex building. The museum building is cooled by one window unit air conditioner in the rear (museum store) portion of the building, and electric baseboard heaters in the first-floor room with exhibit cases provide the only heat. There is no humidification or dehumidification in the museum building beyond what these devices provide when functioning, and staff mentioned the temperature fluctuations prevalent on the second floor of the museum, where there is neither heat nor cooling year round. The Annex building has both heat and air conditioning but no other climate controls, including in collections storage areas, and again, staff mentioned concerns about damage to objects over time due to climate-control and storage issues. A professional consulting curator was employed in the past year, and she left the staff with some good recommendations, including changes to the by-laws and improvements in financial accountability, as well as collections policies and procedures. The library collection in this building is in plain view, and there is space to sit and study, but this work can be disrupted easily by the staff office next door, or by visitors in the reception area on the other side of the room.

Nearly all of the collection is accessioned and catalogued, though no collections management plan exists, and there is no paid staff person or volunteer who has been trained in collections management, handling, or care. Objects on view in the period rooms are cleaned as needed, but some basic supplies and training in object handling could go a long way toward preventing inadvertent accidents or damage. Items not on view in the museum are either stored or on view in the Annex building. While storage is tight and slightly cluttered, it was noted that many items are kept in acid-free boxes and on non-reactive steel shelving, both big pluses. A large volume of paper materials are stored in steel file cabinets that are, by and large, arrayed along one wall of a second floor storage room --- staff and board members should keep in mind that these cabinets are very heavy, and only get heavier over time with the constant addition of more material.

Given that the current board and staff see their organization and museum as a local historical resource, the collections are generally appropriate to their purpose. The MWM building is a significant local historical site and, with its history, enables the staff to talk about changes in the community over time. However, as with the artifact and document collections, the staff has neither background nor training in historic preservation, so building issues may exist or could arise without being noticed by staff until a problem becomes much more obvious. Without doing a more thorough review of the collection itself, it still appeared to me that the objects in the period rooms were appropriate to the spaces and to the site history being interpreted on the tours. While small, the cased exhibit space in the MWM building does provide a place to show and

discuss other issues, time periods, and topics, but the staff should avoid using the cases as merely a place to dump all other interesting objects that don't fit the theme of one of the rooms. Small changing exhibits that are more focused could be more meaningful, could use items that are not often seen, or that hit on other, but very local subject matter.

Like revising the mission, the creation of an interpretive master plan will help document the existing site and collections, provide the justification for using them in a certain way, and help to guide future collecting and de-accessioning (if necessary). This plan would also provide the opportunity for in-depth scholarly analysis of both buildings, and could include a comprehensive survey of each collection item.

Recommendations

- Rather than trying to control all spaces, create “micro-climates” in areas where collections are stored with plug-in dehumidifiers, especially during the warmer months. Items that are susceptible to moisture damage should be in a place where air can circulate freely, and should be closely monitored to detect changes as soon as possible. There are a variety of websites, inexpensive print materials and workshops that can provide a lot of guidance on collections management, handling, and general care.
- Contact area universities and colleges with historic preservation and museum studies programs to see about using interns for collections-related projects.
- Apply for collections-focused grants or hold artifact-focused events or workshops to raise money for improvements to storage, software upgrades, archival supplies, or professional help.
- Partner with other organizations to offer programming on historic preservation (workshops, seminars, etc.) that can also raise awareness of and support for the museum's own needs.
- Use the exhibit cases in the MWM to vary the interpretations in this building and provide diversity. Show other objects, organized around a different theme, that help the staff tell additional local stories such as changes in the local economy, area residents in military service, the Great Depression in Lilac Cove, the original American Indian residents of the region, and on and on.. Offer the space to local groups to tell their OWN local stories, such as the development and struggles of the Black community in town, the arrival and experiences of large Hispanic populations, etc. It's ALL local history, and it provides a reason for even frequent visitors to come back again and again, as well as attracting new audiences and new items for the collection.
- Create an interpretive master plan, to guide the organization's collecting activities, set out collections policies, and provide the historical background for what you collect and why.

Administration & Finance

The museum is staffed by two part-time people who serve as “co-administrators,” an additional two part-time paid docents during the summer months, and about 14 volunteers. Beyond their governance function, HLCM acts as a support organization through their membership activities, which provides both funding and a pool of prospective volunteers, theoretically. Board members assist the staff with some of the public events, as well.

The small size of the staff and their limited hours are issues here but, much more importantly, no one on the staff has any sort of professional training in museum work, or in any of the most critical areas where the museum could most use help. Both of the administrators are well-motivated and care deeply about the success of the museum, but they’ve been learning as they go, up to this point, and are overwhelmed trying to move in so many different directions at once. The written job description for the position is very broad, and covers all major administrative functions; if the board intends to keep two people in essentially the same position, they could at least formally divide the management duties on paper, based on each person’s skills. No written personnel procedures are in place, but the board can draft these once it has resolved its’ mission and institutional focus issues outlined earlier in this report. One of the administrators, Jenny Flowers, possesses superior people skills, which are essential for public programs, interpretation, and the training of other staff and volunteers. Her co-administrator, Sandra Lilly, has an impressive background in non-profit organizational management and training experience, and a wonderful attention to detail, but the MWM is her first museum job. Both women have expressed a great deal of interest in museum training and are not the least bit intimidated by the thought of learning on-the-job, but this needs to be an institutional priority. With the list of fundamental procedural and operational challenges that HLCM and the MWM faces, it will take much longer for each of these things to happen without extensive staff training, funding to allow the hiring of professionals to assist, or a mixture of both. Fortunately, there are a wide variety of courses, workshops and conferences available on a regular basis --- it will be imperative for the staff to make time for them in priority order (according to the most pressing needs), and for the HLCM board to make sure that funding is set aside in the budget each year to pay for registrations and travel.

In the short term, the HLCM board has made the strategic decision to close the museum to the public during the winter. This should help to trim operating costs and provide time for the staff to focus on internal operational issues, while taking advantage of traditionally very light visitation during this period. If this is successful, it should be considered as a permanent change to the museum’s operating hours, while still entertaining requests for research or special tours by appointment.

Space is at a premium in the two buildings that HLCM operates, the Annex and the MWM itself. The lease agreement with the town allows for the Annex building to be demolished and another, more useful museum administration building put in its place, but the economy and the museum’s budget will not allow this idea to progress any time soon. Therefore, the board and staff should make every effort to use each space in the Annex as efficiently as possible, and this is largely being done. Collections storage and the other second floor storage rooms could be better organized, with items moved off of the floor and onto steel shelving as soon as possible.

Supplies and materials for public programs and special events should be stored separately from collections items, with simple signs on the walls indicating what is stored where. A security survey of the museum and Annex buildings has been completed and submitted to the board and staff by the town police, and will provide a great deal of guidance as funding becomes available to make improvements.

Financially, the museum is supported largely with annual grant money from the county, which is supplemented with earned income from museum store operations, admissions, facility (park) rentals, and HLCM memberships. There is currently no annual budgetary process; the HLCM board and staff basically work off of prior year actual expenses, and try to generate additional revenues the best they can. There are no real cash management policies in effect, and the organization suffered probable internal theft as a result in 2007, due to poor accounting and former staff misuse of funds. Museum store proceeds are handled with an antique cash register, and all bookkeeping for the store and other revenue sources is done basically by hand.

The current board and staff realize the problems with all of these systems, and are acting to rectify the situation. During my site visit in November, basic cash management and accounting procedures were discussed at the board meeting, and steps are being taken to improve each part of the process. A modern, programmable cash register is being considered for the museum store that can track revenues from all tours and other paid programming, along with store sales by department or PLU number. The current Treasurer of HLCM is the branch manager of a local bank, and will work with the staff to develop cash management procedures and policies, including balancing the register at the end of each business day, regular deposits, and the safe-keeping of cash on hand overnight. The board has also moved to require two signers on each check, which was not done in the past. The franchise agreement with the town of Lilac Cove also requires that HLCM meet with the town at the end of the fiscal year, to submit a balance sheet of income and expense. It might be good practice, from now on, to submit a copy of a proposed budget for the upcoming fiscal year, as well.

It is unclear how secure the annual funding is from the County, and this should be a major consideration of the HLCM board, since it makes up over 80% of the museum's budget. All museums of whatever size should constantly be seeking ways to broaden their sources of financial support, to protect themselves against problems with any one source, and this is certainly the case with this museum as well. A major cut to the County's annual grant or its loss altogether would cripple the ability of HLCM to offer any sort of programming or staffing at the MWM, and would threaten the security of collections. Nevertheless, while the organization seeks additional revenues, it is imperative that an annual budgetary process is begun, to plan effectively for the use of the funds that the museum DOES receive currently. A regular connection needs to be established and maintained (if it doesn't exist already) between the HLCM board and the County agency that provides the museum's annual grant, so that the organization receives the best information possible about pending cuts or anticipated increases, so that effective planning is possible. Again, once the mission and purpose are clarified, the board and staff should mercilessly attack the current lineup of programs, and fund only those things that support the mission in a meaningful way, as well as those that not only support the mission but return revenue to the site.

The museum store is small, but attractive, and offers a good variety of merchandise in a wide range of price points. A concerted effort should be made to find volunteers who can staff the store semi-independently, allowing the paid staff to have more time for tours, planning, collections care, and other administrative tasks. Many museum stores across the country are largely volunteer-run, or operated by a separate non-profit organization whose sole purpose is to support their parent museums financially. As with many other areas of museum operations, there are several regional and national organizations that can help with advice and training on running a museum store, as well as a lot of information online.

Recommendations

- The HLCM board and staff decide which of their critical needs are most important, and focus on finding training opportunities for the staff in those areas. Ideally, the training should be designed to take place during the winter months, when the museum is closed.
- At their board meeting in February or early March, the board and staff discuss the success of closing for part of the year. Analyzing visitation figures from past years, they may find it worthwhile to adjust the open hours at other times of the year, providing more quiet time for the staff to work on other duties.
- Go through the storage rooms in the Annex mercilessly, giving away or throwing away any program materials that are not needed and taking up space. Assign functions to each room, so that collections can be better organized for tracking and security, and out of the way of program or education program materials that may need to come and go from storage. As funding allows, remove all corrugated cardboard and other storage materials that are not acid-free.
- As funding allows, purchase a stand-alone dehumidifier and a gauge to measure temperature and relative humidity for the collections rooms. Track the conditions in the rooms by taking readings on a regular schedule (daily, preferably), so that conditions are known and monitored, and problems can be detected early.
- Many of the “big box” stores now carry programmable, multi-department electronic cash registers, for less than \$500. Set-up through a desktop or laptop computer, sales data can be downloaded back into the computer periodically for tracking and accounting purposes. Together with improved cash-management procedures, the staff will be able to account for daily proceeds, by activity, much more accurately and professionally. The register drawer can/should be removed to a secure location each night. Membership in the Museum Store Association can provide a great deal of shop management assistance, through their publications, conferences, and networking with other members.
- Have an honest and open discussion with town AND county officials about stable funding for HLCM. Talk about how the grant amount was determined, and what the possibilities are for that amount being either increased or reduced, depending on economic conditions. Among the board and staff, have a “rainy day” plan for safeguarding the buildings and collections if funding is suddenly curtailed.
- Carefully review all existing programs, and focus time and resources on those that relate to your mission and make money. Seek partnering opportunities with similar organizations and split the proceeds.
- For foundation support, The Foundation Center (www.foundationcenter.org) is an excellent source for information. The Center has cooperating collections across the

United States – identify the one closest to the museum – the librarians are trained to assist in searching and advising on grant opportunities.

Governance

Incorporated in 1970 with a board of just three members, Historic Lilac Cove, Mississippi Inc. exists today primarily to study and promote local history, which it does through its operation of the Moffett-Weigert Museum and the library collection in the Rosen House annex. While the organization's mission, changes to that mission, and a need for additional revision have already been discussed, there is no question that the ten-member board that leads it today is deeply committed to success and continued growth. Members have roots in the community, and all share a love for local history and historic sites. Beyond the bank manager mentioned above, the HLCM board also includes local historians, business people, and the mayor of the town. Three-year term limits are staggered, to provide continuity and turnover, and the board expressed a desire for more diversity when the time came to elect new directors. Following onto staff attempts to explore other topics in local history in the coming years, the HLCM board could help this process too, by actively seeking out interested prospective directors among minority populations, who will offer fresh insights and connections to new audiences.

The meeting I attended was quite long, but staff expressed satisfaction that much had been accomplished in this particular session. I noticed that during the course of the meeting, all topics, large and small, seemed to come before the full board for discussion, when some smaller 3-person committees might have come in handy. Running effective and efficient meetings is difficult, but very important, allowing more business to be conducted in a timely manner, and making board service a pleasure rather than drudgery. An e-mail sent around a few weeks before each meeting by the president could solicit potential agenda items, which he then would finalize with the administrators, and distribute to all via the board secretary. Staff should provide an informational and support role at board meetings, rather than leading the discussion. One item discussed near the end of the meeting concerned a return to regular membership meetings, on either a bi-monthly or quarterly basis, after they had lapsed for some time. The new proposed schedule would include a speaker or some type of program at each meeting, to entice members to come out for them and to get more involved in the museum and its programs --- this was an excellent idea that should be pursued.

Though an independent 501 (c) (3) organization under Federal tax law, HLCM is tied to the town of Lilac Cove through the Franchise Ordinance entered into in 1998, and is dependent on the county financially, as mentioned above. The Ordinance lays out the terms of the HLCM/town relationship and property lease very clearly, and specifies the responsibilities of each party in regard to maintenance, use of the facilities, the raising and use of revenues from museum operations, insurance coverage, and ownership of assets should one or the other party fail in some way. The town's commitment to HLCM and the museum is also stated clearly, describing it as "vital to the cultural and historical life of the Lilac Cove community" and pledging their support "for uninterrupted existence of the Museum, Park and Rosen House." As operators of one of the main tourist attractions in town, HLCM and the museum staff should treasure a good and close working relationship with the town, as it is a situation that many similar institutions would envy. Likewise, a closer relationship with County government can only benefit the

museum, as a greater familiarity with MWM programs and educational services will prove to County officials that the organization is truly a valued part of the community.

I got the sense, from the board meeting that I attended, that the entire board helps the staff to plan events and programs, as well as assisting with day-to-day museum administration issues. While this input is valuable, especially where it concerns areas of appropriateness to the institution's mission and financial feasibility, this may be another area in which a subcommittee would be a more efficient and effective way to providing that input and assistance. Certainly, until the staff feels more confident with their own museum management expertise, board involvement is critical to successful programming and financial stability. It will be a sign of organizational maturity down the road, however, when the board can spend more of their time on big picture issues of developing HLCM, rather than worrying about tours, programs, and daily cash management.

Recommendations

- Make sure that key Town and County officials are invited to EVERY major museum event, and that they also receive the museum newsletter and promotional flyers.
- Develop a regular annual budget process, timed to coincide with the County's, and basic accounting procedures for all financial aspects of HLCM --- museum admissions, special events, museum store, donations, rental program, sponsorships, etc. This will show both Town and County officials, as well as prospective granting agencies, that the organization is run in a professional manner, and efficiently manages every bit of its limited resources.
- Monitor the enthusiasm of the membership for programs attached to the bi-monthly meetings, soliciting ideas from them for future topics, speakers, or presentations. Have simple feedback forms available for people to either fill out right then or take home and mail back to the museum as they have time, including categories of regular need that they can simply check off ("I'm interested in helping in the museum store," "I'd like to help care for the collection," "I'd love to help do research," etc.).
- Look for areas of museum development that board members can take on, such as establishing contacts in under-represented segments of the community, meeting with school social studies specialists to discuss field trips or outreach program interests, and soliciting companies and wealthy individuals for small or large-scale sponsorship of HLCM activities or even one-time projects.

Summary & Recommendations

Historic Lilac Cove, Mississippi Inc. has made a good start positioning the organization as a community history resource, and in presenting the Moffett-Weigert Museum to the public as a historic site. While much work remains to be done in some very basic and critical areas, HLCM benefits by having a good sense of itself already, and what it can offer the community. Ironically, the HLCM board is actually better off having to deal with many of these issues now, while the operation is still small, than having to reorganize a much larger and more complex organization. The key concept to bear in mind, as setbacks occur and plans get postponed, is that this is a small community history institution, serving a small town . . . there's no good reason to try to move too far, too fast, especially given budgetary constraints. It will be much more worthwhile for the board and staff to focus on doing a few things very well and professionally, rather than to try to do too much with too few resources, both human and financial.

Following is an abbreviated running list of the recommendations made in the report above, split out into two rough priority groups, with a note by each that refers to the section of the report where discussions of that issue appear. The first group includes items and issues that the board and staff should address as soon as possible, for their completion is critical before issues in the second group can be tackled.

Most Critical Tasks

- Refine the mission --- solicit feedback from the community and spend time thinking about HLCM's role and the use of the MWM in fulfilling that vision. (Mission)
- Re-focus priorities in the budget and through staff time --- where should existing resources should be allocated, what new sources of money are out there, and which of HLCM's services and programs best reflect the new mission and identity. (Mission, Interpretation)
- Collections care --- clean and reorganize storage, create "micro-climates" with small dehumidifiers, and monitor conditions regularly. (Collections)
- Staff training --- board and staff focus on training related to the most pressing needs, taking advantage of slower winter months, if possible. (Administration)
- Financial procedures --- purchase a modern cash register, implement new daily cash management procedures, and create an annual budget cycle to plan more effectively. (Administration, Governance)
- Sustainability --- discuss next year's budget with town and county officials, sounding them out on challenges they face, and asking for their commitment to HLCM. (Administration, Governance)

Secondary Tasks

- New programs for new audiences --- new events or programs that can bring HLCM a more diverse audience. (Interpretation)
- Free or cheap help --- find and train volunteers specifically for collections care, museum store assistance, and other basic administrative tasks. (Interpretation, Collections, Administration)

- Financial aid --- apply for grants or hold events to raise money for specific collections care improvements, including partnering with organizations with similar interests. (Collections)
- Broaden appeal through changing exhibits --- use the exhibit cases in the MWM to vary the interpretations in this building and provide diversity. (Interpretation)
- Create an interpretive master plan --- serves as a mission document for the collection, establishes policies, and provides scholarship. (Collections)
- Market your product to the right people --- keep key Town and County officials in the loop as far as events, major gifts, new initiatives and services, and financial needs. (Governance)
- Keep building a solid foundation --- constantly seek out ways to get HLCM board members and the membership involved, in as many areas of the organization as possible. (Governance)
- Worthwhile advice --- as funding allows, join other organizations that can offer training and advice on every aspect of museum work, as well as networking opportunities. (listed below)

Related Resources

This list is merely intended to get you started, and introduce some sites that you may not have been to yet for help . . . there is a *great* deal of assistance available.

Print

Museum Strategy and Marketing, Neil Kotler and Philip Kotler, Jossey-Bass, 1998.

Local History, National Heritage, Rath, et al, AASLH, 1991

Help for the Small Museum --- Handbook of Exhibit Ideas and Methods, Arminta Neal, Pruett. 1987.

Conservation in Context: Finding a Balance for the Historic House Museum, Wendy Claire Jessup, ed., The National Trust for Historic Preservation, 1995.

Museum Store Management, Mary Miley Theobald, AASLH, 2000.

Mastering Civic Engagement --- A Challenge to Museums, AAM, 2002.

Online

Mission

- AAM website --- <http://www.aam-us.org/>
- AAM and AASLH publications --- <http://www.aam-us.org/>; <http://www.aaslh.org/>

Collections Policy & Care

- Texas Historic Commission --- <http://www.thc.state.tx.us/museums/musWord/BasicGuideforPreservHistArtifacts.doc>
- Prince William County, Historic Preservation Division --- <http://www.pwcgov.org/default.aspx?topic=030039002130003937>
- The Henry Ford Museum website --- <http://www.thehenryford.org/research/caring.aspx>
- Conservation Center for Art and Historic Artifacts --- <http://www.ccaha.org/>

Museum management, training, conferences ---

- AAM
- AASLH
- Mississippi Assn. of Museums --- <http://www.vamuseums.org>
- Museum Store Assn. --- <http://www.museumdistrict.com/>
- National Park Service --- <http://www.nps.gov/history/crm/>
- National Trust --- <http://www.preservationnation.org/index.html>
- Traditional Building Show --- <http://www.traditionalbuildingshow.com/index.shtml>

Smithsonian Affiliations

Consider joining the Smithsonian Affiliations Program – a good source for resources, including the Visiting Professionals Program for staff training, and traveling exhibitions or loans, and the ability to use the Smithsonian logo in marketing (information available on: <http://affiliations.si.edu/>).

Institutional Planning

Review the requirements for a strategic plan as defined by the AAM Accreditation Program as a guide. The plan must address all relevant areas of museum operations, list goals, list action steps, assign responsibility for accomplishing action steps, assign both the human and financial resources needed to implement the plan, list steps to obtain resources, and include a timeline. Various published sources can assist the process moving forward. These include John M. Bryson and Farnum K. Ashton, *Creating and Implementing Your Strategic Plan: A Workbook for Public and Nonprofit Organizations*, 2nd edition (Jossey-Bass, 2004), and Gary Edson and David Dean, *The Handbook for Museums* (Routledge, 1996).

Writing a Collections Management Policy

Two books that are essential for writing/revising a collections management policy and forms are Marie C. Malaro's book (*A Legal Primer on Managing Museum Collections*), and the Texas Association of Museums book, *The Museum Forms Book*.

The AAM Information Center offers a Fact Sheet (PDF) that outlines the typical components of a museum collections management policy.

Museum News presents an article that offers advice on crafting a collections management policy. http://www.aam-us.org/pubs/mn/MN_JF04_ManagingThings.cfm

The Smithsonian Institution offers an online manual for Developing a Collections Management Policy (<http://siarchives.si.edu/collections/cmp.html>). It notes that museums are so varied that there is no single model collections management policy. There are, however, common issues that all institutions should consider; these are listed in the Components section of the manual. http://siarchives.si.edu/collections/cmp_function.html

Stephen K. Urice, *Collections Management Policies and a Museum Trustee's Duties*. ALI-ABA: Legal Problems of Museum Administration, 1997.

Simmons, John. *Things Great and Small Collections Management Policies*. ISBN 933253-03-7

Mission Statement

As the Museum reviews its mission statement, ensure that it effectively communicates *why* the Museum exists and *how* it relates to its public.

When describing the value of a mission statement, Harold Skramstad, former President of the Henry Ford Museum & Greenfield Village, wrote that, “a clear and focused statement of mission stakes a museum’s claim to its distinctiveness, is a guide to action, and a powerful yardstick against which the museum itself can assess each and every activity it carries out.” An excellent tool that can help direct this process is *Museum Mission Statements: Building a Distinct Identity*, edited by Gail Anderson and printed by the American Association of Museums in 1998.

According to *Museum Mission Statements*, a well-crafted mission statement demonstrates the following characteristics:

- Three key elements: (1) reason why the museum exists, (2) audience/market served, and (3) deliverable services or means for achieving the mission.
- Words that convey the parameters of the museum,
- Institutional priorities that indicate what the museum emphasizes, and
- A format that is concise, direct, and uses clear and appropriate language.
- When revising the mission statement, ask these questions:
 - What should we be doing? How do your constituencies feel about the museum’s efforts at preserving and communicating?
 - For whom should we do it? Whom do you want to serve?
 - What tools will we use to get there? (Exhibitions, collections, tours, partnerships, etc.)

Are all programs tied to your mission? Are you serving the public you said you’d serve? Do people care about what you do?

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.