




StEPs-UT Program | PROGRAM ORIENTATION AGENDA

Monday, 30 July 2018 | 1:00pm–5:00pm

Rio Grande Depot, 300 Rio Grande Street, Salt Lake City, UT 84101

Jennifer Ortiz (Utah Arts & Museums) | Megan van Frank (Utah Humanities)

1:00–1:15 pm	Welcome and Introductions (All) <ul style="list-style-type: none"> • Housekeeping details • Introduce selves • Overview of schedule and goals for afternoon
1:15–1:30 pm	Introduction to StEPs Program & StEPs-UT Pilot (Jennifer & Megan) <ul style="list-style-type: none"> • Environment for StEPs in Utah • National StEPs program from the American Association for State & Local History • StEPs-UT as a jumpstart program
1:30–2:15 pm	StEPs Content Overview (Module Instructors) <ul style="list-style-type: none"> • Presentation of module content with check on priorities
2:15–2:45 pm	Understanding Your Commitment to StEPs-UT (Jennifer) <ul style="list-style-type: none"> • Benefits & Expectations (attendance, payment, bronze level certificates) • Program Evaluation (Kari Ross Nelson)
2:45–3:00 pm	BREAK
3:00–3:15 pm	Using Your StEPs Workbook (Megan) <ul style="list-style-type: none"> • How to use this thing?
3:15–3:30 pm	Tools for Success (Jennifer & Megan) <ul style="list-style-type: none"> • StEPs Online Community and StEPs-UT Facebook Group • StEPs-UT Resources Page • StEPs-UT Project Funding
3:30–4:00 pm	Project & Time Management (Jennifer & Megan) <ul style="list-style-type: none"> • AASLH webinar and discussion • Planning & Management Tools
4:00–4:45 pm	Mentor Group Break-out Discussions (Mentors with their 2-3 groups) <ul style="list-style-type: none"> • Get to know your mentor groups and possible synergies
4:45–5:00 pm	Wrap-up (Everyone) <ul style="list-style-type: none"> • Questions? Comments? • Nametags to the basket please
6:00 pm	Dinner @ Settebello Pizzeria, 260 S 200 W, Salt Lake City, UT 84101



StEPs-UT Pilot Program
PARTICIPANT
ORIENTATION

Megan van Frank | Utah Humanities
Jennifer Ortiz | Utah Division of Arts & Museums
July 30, 2018 | Salt Lake City, UT

INTRODUCTIONS
& AGENDA OVERVIEW

Agenda Overview

SCHEDULE

Afternoon

- Introductions
- Agenda & Goals
- Introduction to StEPs and StEPs-UT
- Module Introductions
- Understanding your Commitment to StEPs-UT
- StEPs Workbook & Tools for Success
- Time Management
- Mentor / Mentee Breakout
- Wrap Up & Discussion


GOALS FOR TODAY

Orientation

- Coming Together as a Cohort
- Understanding StEPs
- Understanding StEPs-UT
- Understanding Logistics
- Setting Expectations

Refreshing Skills

- Time Management
- Peer Mentoring



StEPs-UT Participants

- Alf Engen Ski Museum (Park City)
- Cache County Daughters of Utah Pioneers Museum (Logan)
- Fort Douglas Military Museum (Salt Lake City)
- Hyrum City Museum (Hyrum)
- Murray City Museum (Murray)
- Uintah County Heritage Museum (Vernal)
- Union Station Museums (Ogden)



StEPs-UT Delivery Team

COORDINATORS



Jennifer Ortiz
Manager, Office of Museum Services
Utah Division of Arts & Museums
801.245.7288
jenniferortiz@utah.gov



Megan van Frank
Director, Center for Community
Heritage | Utah Humanities
801.359.9670 x110
vanfrank@utahhumanities.org

**We'll meet Instructors
in a minute...**

MENTORS



Karen Krieger
Museum Consultant
801.541.1896
karenkrieger@msn.com



Pam Miller
Museum Consultant
435.650.2900
9milepam@gmail.com



Steve Olsen
LDS Church History Department
801.598.7966
olsensl@ldschurch.org

StEPs PROGRAM & StEPs-UT PILOT

WHY StEPs? | Museums & Public Trust

- Museums make their **unique contribution** to the public by collecting, preserving and interpreting the things of this world.
- They **own and use natural objects and human artifacts** to advance knowledge and nourish the human spirit. Collections are the basis for research, exhibits, and programs that invite public participation.
- US museums are grounded in the **tradition of public service**. As public trusts, they hold their collections and information as a benefit for those they were established to serve. Members of their governing authority, employees and volunteers are committed to the interests of these beneficiaries.
- Local, state and federal law provides the basic framework for museum operations. But **legal standards are a minimum**.
- Museums must do more than avoid legal liability, they must take affirmative **steps to maintain their integrity so as to warrant public confidence**. They must act not only legally but also ethically.

Source: AAM Code of Ethics for Museums

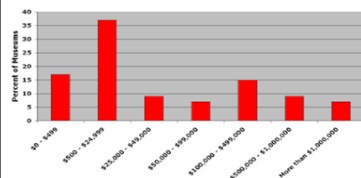
Challenging Utah Museum Environment



- Far-flung geography, long distances, sparse populations
- 250+ Utah museums – all shapes & sizes
- Cultural anchors in communities
- Single room galleries, fascinating collections with strong local connections
- Volunteer and (poorly) paid staff with often limited training, limited grants-savvy, and high turnover
- Inconsistent understanding of museum best practices

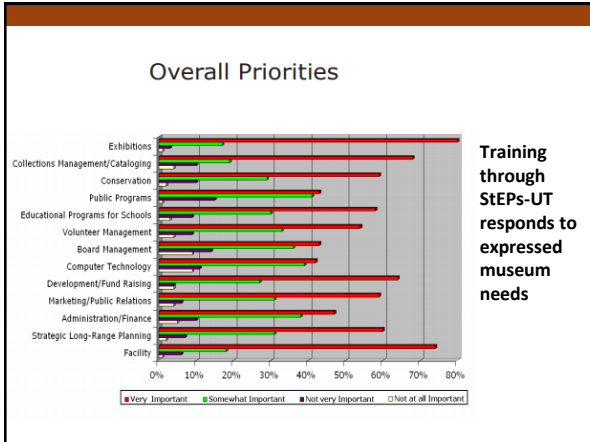
Statistics from Dan Jones & Associates 2006 Utah Museums Survey of Utah's 255 museums. Recent Utah Division of Arts & Museums surveys in 2010-2016 of smaller numbers of "Certified Utah Museums" continue to substantiate the 2006 data.

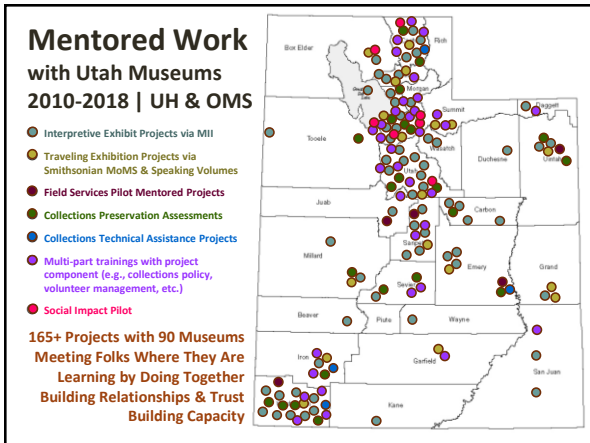
Annual Operating Budget



Most run on \$25,000 or less, making it difficult to access quality training and maintain staff

- Small museum = operating budget <\$250K (AASLH, AAM)
- 70% Utah museums are <\$100K
- 54% are <\$25K





What is StEPs?

- StEPs is a program created by the American Association for State and Local History (AASLH) and is an acronym for “Standards and Excellence Program for History Organizations.”
- Since its debut in 2009, StEPs has helped 900+ institutions nationwide begin taking “steps” to plan for positive change.

StEPs

Standards and Excellence Program
for History Organizations



What is AASLH? A NATIONAL HOME for HISTORY

- AASLH stands for the American Association for State and Local History.
- AASLH serves all-volunteer run museums, national historical institutions, and everyone in between.
- Offers diverse programs and services that advance the goals and standards of the field of state and local history nationally.
- Core services include: *History News* magazine, [The AASLH Annual Meeting and Online Conference](#), Technical Leaflets, *AltaMira* book series, [StEPs program](#), [Professional Development Programs](#), [Affinity Communities](#) and more.



What is StEPs?



"With the basic, good and better levels, StEPs became a valuable experience for us and helped us set goals for the future."

- Flavia Cigliano
Nichols House Museum, Boston

- ✓ Standards and Excellence Program for History Organizations
- ✓ Self-study program to help museums and sites assess policies and practices
- ✓ Primarily for small to mid-size organizations, but open to all
- ✓ Flexible way to work towards making improvements and meeting national standards
- ✓ No application or eligibility requirements



- National recognition for certificates earned
- Window decal
- Discounts on AASLH workshops, webinars, courses, and publications



"It was wonderful to see our hard work pay off when we earned our first gold certificate. StEPs showed us we're on the right track and more importantly, it made our board understand there's a reason why we have to pay attention to these things."

- Charlene Orr, Historic Mesquite, Mesquite, Texas

StEPs-UT Jumpstart Pilot



GOALS

- Holistic approach – at both content & organizational levels
- Training & mentoring & peer support for 7 Utah museums
- Effort to streamline statewide field services providers – engage new and existing partners
- Build a network of trainers in a variety of disciplines
- Develop core curriculum specific to Utah's needs



StEPs-UT Jumpstart Pilot

- Tackle standards on StEPs **basic / good / better** continuum.
- Work through **6 StEPs modules** in **4-month chunks** over 2 years.
- Each module taught by **2 lead instructors** who are experts in assigned area of focus and interested in field services.
- Each participating organization assigned a **dedicated mentor** for whole program to individualize content & provide consistency.
- Each module includes **three workshop days** (one each in months 1, 2, and 4), plus **one site visit** by assigned mentors (in month 3).
- Each org has up to **8 hours additional mentor time** per module.
- Each org completes at least **one small project** for each module.




Kirsten Darrington
Independent Nonprofit Consultant
kirdarrington@gmail.com




Natalie Petersen
Assistant Director
Utah Division of Arts & Museums
npetersen@utah.gov

Module 1 | Mission, Vision, Governance

- Mission
- Governing documents
- Governing authority
- Governing authority's role in financial management, policy development, and strategic planning
- Ethics
- Support groups




Kevin Fayles
Assistant Director
Utah Division of State History
kfayles@utah.gov



Natalie Petersen
Assistant Director
Utah Division of Arts & Museums
npetersen@utah.gov

Module 2 | Management

- Fiscal responsibility
- Fundraising and sustainable funding
- Space allocation
- Safety and security
- Facility care and visitor amenities
- Risk management
- Compliance with laws, codes, and regulations
- Institutional planning
- Job performance evaluation
- Records management and institutional archives



Kari Ross Nelson
Independent Evaluator
kari.ross.nelson@gmail.com



Mindy Wilson
PR & Marketing Manager
Utah Museum of Fine Arts
mindy.wilson@umfa.utah.edu

Module 3 | Audience

- Marketing and public relations
- Audience and visitor research
- Community relations
- Visitor services



Glenna Nielsen Grimm
Anthropology Collections Manager
Natural History Museum of Utah
grielsen@nhmu.utah.edu



Robyn Haynie
Assistant Director of Collections & Exhibitions / Conservator
Utah Museum of Fine Arts
robynhaynie@gmail.com

Module 4 | Stewardship of Collections

- Policies
- Management
- Planning
- Institutional archives
- Collections care and preventive conservation
- Conservation treatment and documentation
- Research
- Public access to collections
- Emergency preparedness

Module 5 | Stewardship of Historic Structures & Landscapes

- Management
- Preservation
- Policies
- Research and documentation
- Public access
- Public safety



David Amott
Preservation Programs Director
Preservation Utah
david@preservationutah.org



Kirk Huffaker
Executive Director
Preservation Utah
kirk@preservationutah.org



Roger Roper
Deputy SHPO, Preservation
Utah Division of State History
rroper@utah.gov



Virginia Catherall
Curator of Education
Utah Museum of Fine Arts
virginia.catherall@umfa.utah.edu



Lisa Thompson
Interpretive Planner
Natural History Museum of Utah
lthompson@nhmu.utah.edu

Module 6 | Interpretation

- Programs
- Exhibitions
- Publications
- Policies, management, planning

UNDERSTANDING YOUR COMMITMENT TO StEPs-UT

Participating Museums | **BENEFITS**

- 12 full-day and 6 half-day trainings led by highly qualified professionals.
- 6 individual site visits from dedicated mentor to discuss progress in each module.
- Extended access to dedicated mentor for individual problem-solving (training days, site visits, plus 8 hours consulting per module).
- Educational resources (e.g., notes, written materials, etc.) as a long-term resource.
- Peer network of support.
- Access to online community (local & national).
- AASLH membership for both program years.
- Enrollment in AASLH's national StEPs program (workbook, online community, and national achievement recognition system).
- Exclusive access to funding for projects related to achieving StEPs standards (up to \$1,500 each year).

Participating Museums | **COMMITMENTS**

- Participate as a whole organization, involving board, staff, and volunteers as appropriate.
- Send at least 1-2 participants to all program-related activities (trainings, site visits).
- Absorb travel, lodging, and meal expenses.
- Pay program fees = \$900 per organization total.
- Work in good faith with mentor and in program.
- Complete all six modules.
- Identify and complete one small project per module that advances you within module area.
- Achieve at least a "bronze" level in each StEPs module (lowest of basic/good/better).
- Complete organizational self-assessment for each module.
- Participate in pilot evaluation activities.
- Permit UDAM, UH, and UDSH to use your name in publicity and advocacy efforts.

Participation Logistics

BOARD BUY-IN

- ☐ Board Resolution (should be in by now)
- ☐ Board member involvement in modules

ATTENDANCE

- ☐ Main point of contact per organization
- ☐ Any additional people may attend from your organization at no additional cost but MUST NOTIFY JENNIFER ORTIZ no later than 1 month before new module begins
- ☐ Additional people based on module topic and training need

PROGRAM PAYMENT

- ☐ \$450 per organization for each StEPs-UT year, prepaid per year
- ☐ Can deduct AASLH annual membership fees and one-time StEPs enrollment fee

MODULE CERTIFICATES

- ☐ Certificates vs. Certification
- ☐ Must achieve "Bronze" level status within each module
- ☐ Projects tackled with mentor during module will help move you toward this goal



Evaluation

KARI ROSS NELSON | Independent Evaluator

Pilot Evaluation Questions

- Did this pilot result in a core curriculum specific to Utah museum needs?
- Did it meet participant needs?
- Did this pilot increase the capacity of field services program?
- Is this a viable program?
- Does it increase the capacity of Utah's museums?

Evaluation

What are the expectations of museum participants when it comes to evaluation?

- Pre- and post-module self-assessments from the StEPS workbook
- Debriefing discussions at last session of each module
- Mid-program focus groups
- End-of-program interviews

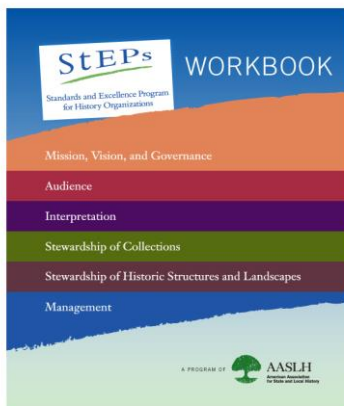


BREAK – 15 minutes

*Instructors may leave if needed



USING YOUR StEPs WORKBOOK



Standards	Self-assessment Questions	Performance Indicators
MVG Standard 1: The institution has a clear understanding of its mission and communicates why it exists and who benefits as a result of its efforts.	A. Does the institution have a <i>mission statement</i>?	Basic <input type="checkbox"/> The institution has a written mission statement that the governing authority, staff, and volunteers understand, remember, and can explain.
		Good <input type="checkbox"/> The mission statement is easily accessible (e.g., posted in the office, printed in the newsletter, and prominent in meeting materials for the governing authority), and the governing authority and staff frequently acquaint themselves with it.
		Better <input type="checkbox"/> The institution reviews the mission statement every three to five years. The review may include members of the community.

Standards	Self-assessment Questions	Performance Indicators
COLL Standard 2: The institution legally, ethically, and effectively manages, documents, cares for, and uses the collections.	1. Are there written procedures for acquiring, borrowing, and lending collection items?	Basic <input type="checkbox"/> The institution uses a written donor form for artifacts and archival items accepted into its collections. <input type="checkbox"/> The institution uses a written loan agreement for each incoming and outgoing loan transaction that involves collection items. <input type="checkbox"/> All loans are for a specified time period.
		Good <input type="checkbox"/> There are written procedures for acquiring, borrowing, and lending artifacts and archival items included in the collections policy.
		Better <input type="checkbox"/> The institution reviews and updates its procedures on a regular basis. <input type="checkbox"/> The institution requires condition reports for all incoming and outgoing loans.
	3. Are there written procedures for deaccession and disposal of collection items?	Basic <input type="checkbox"/> The institution keeps records relating to the deaccession and disposal of artifacts and archival collection items.
		Good <input type="checkbox"/> The institution has written procedures for deaccessioning and disposing of artifacts and archival items included in the collections policy.
		Better <input type="checkbox"/> Procedures include a formal review process and transactions are documented in writing.



Standard and Excellence Program for History Organizations

CONGRATULATIONS TO

Washington County Historical Society

THIS **BRONZE** CERTIFICATE ACKNOWLEDGES COMPLETION OF **BASIC** PERFORMANCE INDICATORS FOR

Stewardship of Historic Structures and Landscapes

StEPs is a self-study program for history organizations that encourages awareness and achievement of national standards.

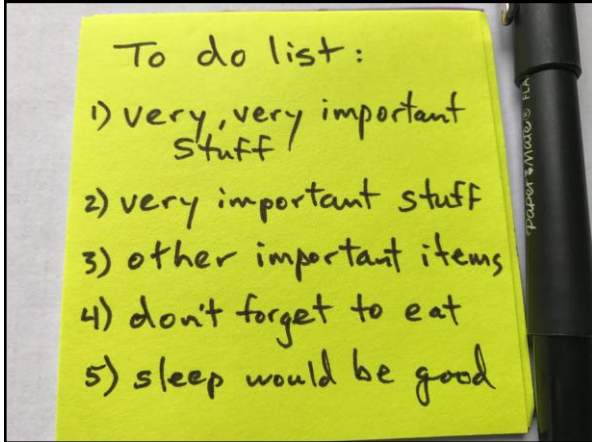

Chris Cook, Senior Program Manager

February 15, 2010
Date


Very Close, President & CEO

A PROGRAM OF THE AMERICAN ASSOCIATION FOR STATE AND LOCAL HISTORY

6 sections x 3 certificate levels = 18 possible certificates





At Your Service!

PROGRAM COORDINATORS


- Megan van Frank | Lead on Instructors, Mentors, Finances
- Jennifer Ortiz | Lead on Participating Organization Management

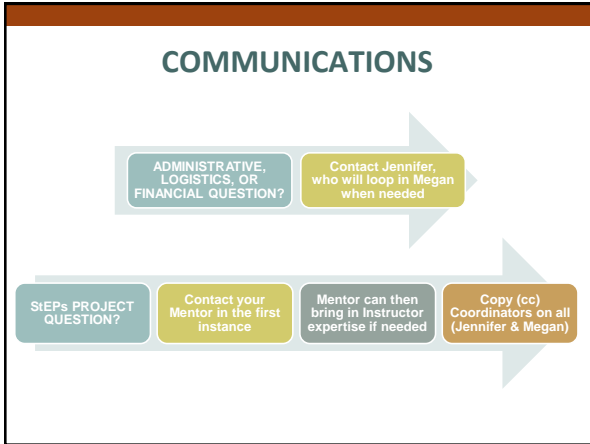
MENTORS

- Steve Olsen | Fort Douglas Military Museum & Uintah County Heritage Museum
- Pam Miller | Ogden Union Station & Alf Engen Ski Museum
- Karen Krieger | Cache DUP, Hyrum City Museum, Murray City Museum

INSTRUCTORS

- MVG | Kirsten Darrington & Natalie Petersen
- MGMT | Kevin Fayles & Natalie Petersen
- AUD | Kari Ross Nelson & Mindy Wilson
- COLL | Glenna Nielsen Grimm & Robyn Haynie
- HSL | Roger Roper, Kirk Huffaker & David Amott
- INT | Virginia Catherall & Lisa Thompson





Resources | StEPs Online Community

www.stepscommunity.org

- When creating your username and password enter invitation code **Da4Cj7o** (case-sensitive and make sure there are no spaces before or after it).
- Please do not share the link or code with others as the site is only for museums that have paid the StEPs enrollment.

Resources | StEPs-UT Facebook

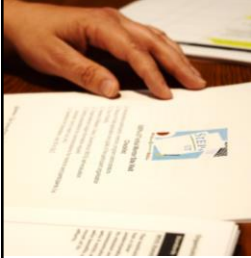
<https://www.facebook.com/groups/StEPsUTGroup/>

Closed Group

- Conversation and sharing space
- Help bridge geographic distances we face
- Involve instructors beyond their window of teaching
- Create a public profile if you are uncomfortable participating with your private account

Resources | StEPs-UT Resources Link

heritage.Utah/gov/arts-and-museums/steps-ut-pilot

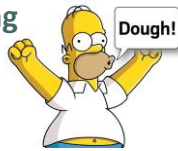


- This page will be updated following each workshop with:
 - ✓ Agenda
 - ✓ PowerPoint presentation
 - ✓ Handouts
- You will also find links to resources helpful for you that relate to each module

Resources | Project Funding

EXCLUSIVE ACCESS TO FUNDING

- Awards up to \$1,500
- Available after Year 1 and again in Year 2
- Use toward a project in the previous 3 modules (i.e. Year 1 = Mission/Vision/Governance, Management, or Audience)
- Funds can be used toward any type of project or purchase that will assist you in reaching at least a "Bronze" level
- Projects can be identified with the assistance of your mentor
- Project funding will not interfere with other funding eligibility from state agencies or from Utah Humanities
- Guidelines forthcoming



PROJECT & TIME MANAGEMENT

Time Management

- *Time is on Your Side: Working StEPs into Your Daily Routines* (time stamp 4:30-22:00)
- [Click link here](#)

Webinar courtesy AASLH

Covey's Time Management Grid

Try the Energy Meter

	Extreme	High	Medium	Low	Idle
Current:					
Committee Meetings		Cataloging new collections		Audience development	Bldg maintenance
Would like to be:					
Audience development		Seeking out relevant collections	Bldg Maintenance	Cataloging collections	Boring meetings

Any Surprises?

Slide courtesy of Linda Norris and AASLH

Project & Time Management Resources

- **Toggle** time tracking tool
- **Gantt Charts** good for showing project phases and time dependencies
- **Todoist** task management
- **Basecamp** team and project management tool
- Any others you use?

MENTOR GROUP BREAK-OUT DISCUSSIONS

POSSIBLE TOPICS OF DISCUSSION

- Getting to know you
- Possible synergies within mentor groups
- Building buy-in in your organization
- How to not get discouraged
- Celebrating success
- Decide on communication plan with your mentor
- Where to from here?



Wrap-Up

- **StEPs-UT is a partnership** between the Utah Division of Arts & Museums, Utah Division of State History, and Utah Humanities, and is supported by funding from the Utah Department of Heritage & Arts, the State of Utah, and the NEH, and is delivered collaboratively.
- Thanks to AASLH and Connecticut Humanities for **valuable resources**.
- **Remember:** Tomorrow is the first full workshop day for Mission, Vision, Governance! See you here in the morning for a 9:00am start!
- Questions? Anything else?
- **Dinner @ 6:00pm at Settebello Pizzeria, 260 S 200 W, SLC**

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jenniferortiz@utah.gov | 801.245.7288

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