### 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)**

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Details</th>
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<tbody>
<tr>
<td>1:00–1:15 pm</td>
<td>Welcome and Introductions (All)</td>
<td>• Housekeeping details&lt;br&gt;• Introduce selves&lt;br&gt;• Overview of schedule and goals for afternoon</td>
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<tr>
<td>1:15–1:30 pm</td>
<td>Introduction to StEPs Program &amp; StEPs-UT Pilot (Jennifer &amp; Megan)</td>
<td>• Environment for StEPs in Utah&lt;br&gt;• National StEPs program from the American Association for State &amp; Local History&lt;br&gt;• StEPs-UT as a jumpstart program</td>
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<tr>
<td>1:30–2:15 pm</td>
<td>StEPs Content Overview (Module Instructors)</td>
<td>• Presentation of module content with check on priorities</td>
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<tr>
<td>2:15–2:45 pm</td>
<td>Understanding Your Commitment to StEPs-UT (Jennifer)</td>
<td>• Benefits &amp; Expectations (attendance, payment, bronze level certificates)&lt;br&gt;• Program Evaluation (Kari Ross Nelson)</td>
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<td>2:45–3:00 pm</td>
<td>BREAK</td>
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<td>3:00–3:15 pm</td>
<td>Using Your StEPs Workbook (Megan)</td>
<td>• How to use this thing?</td>
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<tr>
<td>3:15–3:30 pm</td>
<td>Tools for Success (Jennifer &amp; Megan)</td>
<td>• StEPs Online Community and StEPs-UT Facebook Group&lt;br&gt;• StEPs-UT Resources Page&lt;br&gt;• StEPs-UT Project Funding</td>
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<tr>
<td>3:30–4:00 pm</td>
<td>Project &amp; Time Management (Jennifer &amp; Megan)</td>
<td>• AASLH webinar and discussion&lt;br&gt;• Planning &amp; Management Tools</td>
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<td>4:00–4:45 pm</td>
<td>Mentor Group Break-out Discussions (Mentors with their 2-3 groups)</td>
<td>• Get to know your mentor groups and possible synergies</td>
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<tr>
<td>4:45–5:00 pm</td>
<td>Wrap-up (Everyone)</td>
<td>• Questions? Comments?&lt;br&gt;• Nametags to the basket please</td>
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<td>6:00 pm</td>
<td>Dinner @ Settebello Pizzeria, 260 S 200 W, Salt Lake City, UT 84101</td>
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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
801.245.7088
joortiz@utah.gov

Megan van Frank
Director, Center for Community Heritage | Utah Humanities
801.268.6670 x120
wendyfrank@utahhumanities.org

Karen Krieger
Museum Consultant
801.541.1806
karenkrieger@msn.com

Karen Krieger
Museum Consultant
801.541.1806
karenkrieger@msn.com

**MENTORS**

Pam Miller
Museum Consultant
435.650.2900
9milepam@gmail.com

Steve Olsen
LDS Church History Department
801.298.7546
steveolsen@ldschurch.org

We’ll meet Instructors in a minute...

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 more than 900 institutions nationwide begin taking "steps" to plan for positive change.
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?

✓ 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

"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
• 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.
StEPs CONTENT OVERVIEW

StEPs Overarching Statements

1) The institution is a good steward of its resources held in the public trust.
2) The institution is committed to public accountability and is transparent in its mission and its operations.
3) The institution strives to be inclusive and offers opportunities for diverse participation.
4) The composition, qualifications, and diversity of the institution’s leadership, staff, and volunteers enable it to carry out the institution’s mission and goals.
5) The governing authority, staff, and volunteers legally, ethically, and effectively carry out their responsibilities.
6) The institution is aware that current and innovative technologies can help further its mission, and it employs technology at the level appropriate for its needs and responsibilities.
7) The institution is aware of issues associated with environmental sustainability and takes steps to conserve resources and protect the environment at the level appropriate for its capacity.

All modules aim to support these values:
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

Kirsten Darrington
Independent Nonprofit Consultant
darrington@kirstendarrington.com

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

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 3 | Audience

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

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 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

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

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

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
roper@utah.gov

Module 6 | Interpretation
- Programs
- Exhibitions
- Publications
- Policies, management, planning

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
### 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 STPS 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
TOOLS FOR SUCCESS

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
- MVT | 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
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

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
**DCI Model for Teams**

**ROLES**
- **Who is going to do what on our team? What is expected of me? What can I depend on others to do? What is my role?**
  - **D = Decision Maker**
    - Authority and responsibility to make the decision
  - **C = Consultant**
    - Consulted by the decision maker before decision is made, gives recommendation, provides input, but doesn’t share “the D”
  - **I = Informed**
    - This person must be told of a decision after the decision is made, especially when the decision affects the team member’s role.
  - **W = Worker**
    - The person who implements the decision

**GOALS**
- **What are we going to accomplish? By when? Define interim milestones?**

**PROCEDURES**
- **How will we work together? What are the mechanics of paperwork flow? Coordination of shared tasks? Reporting procedures?**

**SOURCES OF CONFLICT ON TEAMS**
- Conflict comes from disagreements about goals, roles, and procedures. The most frequent reasons for disagreement are ambiguity (people haven’t talked about it in the first place), misunderstanding (people unknowingly have different impressions of the decisions they made), or professional differences of opinion.

**Team & Timeline Management Form**

- **Identify goals of the project**
  - Interim tasks to get there
  - Tangible products as a result
- **Form a project team**
  - 2-5 core people
  - Weigh inclusivity vs productivity
  - Identify stakeholders not on team
- **Clarify team roles & responsibilities**
- **Map out a timeline with due dates**
  - Be realistic!
  - Time for drafts & deadline buffers
- **Seek help outside your team if needed**
- **Document your process & decisions**
  - Binder, notebook, central file
  - Dated copies of drafts
  - Meeting notes
- **Revise as you go along**
Time Management

- Time is on Your Side: Working STEPs into Your Daily Routines (time stamp 4:30-22:00)
- Click link here

Covey’s Time Management Grid

Try the Energy Meter

Any Surprises?

Project & Time Management Resources

- Toggl 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

Jennifer Ortiz | Utah Division of Arts & Museums
jeniverortiz@utah.gov | 801.245.7288
Megan van Frank | Utah Humanities
vanfrank@utahhumanities.org | 801.359.9670