STEWARDSHIP OF COLLECTIONS: An Introduction

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Welcome back!

WELCOME, INTRODUCTIONS & PROGRAM OVERVIEW
COLL Module Instructors

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Agenda Overview

SCHEDULE

Morning
• Welcome & Introductions
• COLL Module Overview
• Stewardship Duties & Challenges
• Collection Scope

Afternoon
• Collection Significance
• Collections Policy Preview
• Wrap-Up & Assignments
• Mentor Group Break-outs

GOALS FOR TODAY

How to Build a Meaningful Collection
• What is a Scope of Collections
• How a mission statement and collections scope work together to guide collections decisions
• Significance Assessment of objects within your collections
• Importance of a Collections Policy and how it relates to the practice of collections management
• Tools and clarity for next steps

GROUND RULES

• Responsible for your own learning
• Respect confidentiality of the room
• Cell phones – be cool
• Honor other people when speaking
• Honor time limits
• Return from breaks & lunch on time
STEWARDSHIP OF COLLECTIONS
MODULE OVERVIEW

Introduction to Collections (COLL)
This module covers:
- Policies
- Management
- Planning
- Institutional archives
- Collections care & preventive conservation
- Conservation treatment & documentation
- Research
- Public access
- Emergency preparedness

Refer to pages 139-185 of your StEPs Workbook

COLL Module Schedule

July 29, 2019
Full-day Workshop | Stewardship of Collections: An Introduction

August 26, 2019
Half-day Skills Lab | Collections Care: When to Call a Conservator

September 2019 (date to be negotiated with Mentor)
Mentor Site Visits | Work on Your Individual Projects

October 28, 2019
Full-Day Workshop | Deeper Dive into Collections Management
**COLL Standard 1**
The institution owns, exhibits, or uses collections that are appropriate to its mission.

A. Are the collections appropriate to the institution’s mission?

**EXAMPLES:**
The Natural History Museum of Utah illuminates the natural world and the place of humans within it.
The Utah Museum of Fine Arts inspires critical dialogue and illuminates the role of art in our lives.

**COLL Standard 2**
The institution legally, ethically, & effectively manages, documents, cares for, & uses the collections.

A. Does the institution have a written, governing authority-approved collections policy?

B. Are staff and volunteers aware of laws and regulations with regard to collections?

C. Does the institution recognize the role of professional ethics regarding collections?

D. Are there designated staff (paid or unpaid, part- or full-time) responsible for collections?

E. Does the institution allocate financial resources for collections care and management?

**COLL Standard 2 – continued**
The institution legally, ethically, & effectively manages, documents, cares for, & uses the collections.

F. Are there written criteria for accepting and refusing collections?

G. Can staff locate artifact and archives items in the collections?

H. Is there a filing system for collections records?

I. Are there written procedures for acquiring, borrowing, and lending collection items?

J. Are there written procedures for deaccession and disposal of collection items?

K. Is there a formal system for numbering & describing collections?

L. Does the institution have an institutional archives?
COLL Standard 2 – and there’s more
The institution legally, ethically, & effectively manages, documents, cares for, & uses the collections.

M. Does the institution take appropriate measures to ensure the safety and security of artifacts and archival items in its care?
N. Are there designated artifact and archives storage areas?
O. Does the institution use preventive conservation measures to provide a safe and stable environment for collections?
P. Does the institution use methods and materials for storing and exhibiting collections that promote their preservation?
Q. Does the institution engage in conservation planning?
R. Do staff perform regular housekeeping in all areas of the facility as well as specialized collections housekeeping?

COLL Standard 3
The institution’s collections-related research is conducted according to appropriate scholarly standards.

A. Does the institution conduct research on the collections?

COLL Standard 4
The institution strategically plans for the use and development of its collections.

A. Do the institution’s planning documents address collections?
COLL Standard 5
Guided by its mission, the institution provides public access to its collections while ensuring their preservation.

A. Does the institution recognize that the collections are held in the public trust?

“Museums in the United States are grounded in the tradition of public service. They are organized as public trusts, holding their collections and information as a benefit for those they were established to serve.”

– AAM Code of Ethics for Museums

COLL Unacceptable Practices
Collections are held in the public trust. Caring for collections is therefore critical work, making collections misuse a serious violation. This includes:

- Personal use of artifacts and archival items, or dealing in collections by staff/volunteers for personal gain.
- Performing irreversible cleaning, restoration, or other procedures.
- Institutional sale of collections material for short term museum needs.
- Use of funds from deaccessioning for anything other than acquisition of new collections or direct care and conservation of existing collections.
- Failure to establish clear ownership of potential donation prior to receipt.
- Inattention to national and international regulations.
- Providing appraisals to outside parties on items for any reason.
- Misrepresentation of a collection item’s origin, history, or condition.
- Use of collections in a manner that threatens their preservation unless designated as part of the hands-on or teaching collection.

What THIS Workshop Covers
- What, why and how do museums collect?
- How can I make my collection more effective?
- How do I know what is a significant object for my museum’s collection?
- How do I make improvements in the area of collecting?
ZERO IN ON TODAY’S INDICATORS

**Standard 1 | Institution owns, exhibits, or uses collections that are appropriate to its mission.**
A. Are the collections appropriate to the institution’s mission?

**Standard 2 | Institution legally, ethically, & effectively manages, documents, cares for, & uses the collections.**
A. Does the org have a written, governing authority-approved collections policy?
B. Are staff/vols aware of laws and regulations with regard to collections?
C. Does org recognize the role of professional ethics regarding collections?
E. Does org allocate financial resources for collections care and management?
F. Are there written criteria for accepting and refusing collections?

ZERO IN ON TODAY’S INDICATORS

**Standard 4 | The institution strategically plans for the use and development of its collections.**
A. Do the institution’s planning documents address collections?

**Standard 5 | Guided by its mission, the institution provides public access to its collections while ensuring their preservation.**
A. Does the institution recognize that the collections are held in the public trust?

SCOPE OF COLLECTIONS: RESPONSIBILITY OF STEWARDSHIP
Responsibility of Stewardship

**MUSEUMS & PUBLIC TRUST**

- Museums acquire, document and preserve collections in accordance with institutional policies, are accountable for them, and pass them to future generations in good condition.
- Collections are used for the exclusive purposes of preservation, research, education, and public education.
- Museums care for collections on behalf of public they serve. In exchange for this public service, museums are granted certain benefits – like non-profit status with tax exemptions and eligibility for federal, state, local grants.
- Collections are heart of the museum and proper care and management is heart of stewardship.

Responsibility of Stewardship

... **AND ITS DILEMMAS**

- Over 4.8 billion artifacts are held in public trust by more than 30,000 collecting institutions in the U.S.A.
- 59% of these museums & libraries lack adequate storage
- 80% of these lack paid staff dedicated to collections care

**AND YET ....**

*Almost every museum lists collecting and preserving as the top two activities in their mission statement*

*Are these activities listed in your mission?*

Responsibility of Stewardship

**COLLECTIONS ARE A LIABILITY**

- We do not list them as assets.
- We do not use them as collateral for loans.
- We do not sell them to pay operating expenses.
- We are bound by mission to care for them.
- They cost us money & will never pay for themselves.
- When we accept a new object into the collection we are committing time, money, space.

**MUSEUM STAFF ARE HELD TO A CODE OF ETHICS**

- We do not profit, compete, or benefit from collecting
- We do not personally use the collections
- We improve & care for collections as part of our public trust
If Collections Are A Liability...

WHAT CAN WE DO?

- Raise money to care for your collection.
- Be thoughtful and strategic about matching your collection and stewardship activities to your organizational capacity to make you BETTER at fulfilling your mission.

... A Scope of Collections Statement Can Help

HANDS-ON ACTIVITY #1

WHAT DO YOU COLLECT?

1) Work on your own.
2) Write what your museum collects (2 minutes).
3) Write what your museum mission is (2 minutes).
4) Turn sheet over and answer questions there (10 minutes for personal reflection).
5) Regroup for large group discussion (10 minutes).

Source: AASLH StEPs Curriculum, Building a Meaningful Collection

DISCUSSION

- Was it easy to identify what you collect?
- Did you easily state your mission?
- Does what you collect support your mission?
- What is not true about what you wrote?
  ✓ Are there items in your collections that do not belong under your mission statement?
  ✓ Do you need to add objects or items to your collections to meet your mission statement? (not enough, or none at all?)
- Would others at your museum agree with you?

Source: AASLH StEPs Curriculum, Building a Meaningful Collection
MORNING BREAK – 15 minutes

SCOPE OF COLLECTIONS:
BUILDING A MEANINGFUL COLLECTION

Why Do Museums Collect?

- For preservation
- Education (lifelong learning, unstructured, continuing interest)
- For research
- Why does YOUR museum collect?
How Do Museums Collect?

- Donation: can be Active, but usually Passive (wait for the object to come to the museum)
- Purchase: Active
- Commission: Active
- Field collection: Active
- Most museums collect through a passive manner, decisions are then made when the object is offered to that museum.

Where does your museum fit?

*How can we turn the usually “passive” donation option of collecting into an active one?*

For Whom Do You Collect?

- You? Your community?
  - Who is your community? If you don’t know, find out
- Do people at your museum (board, staff, volunteers, visitors) represent your community?
  - If not, ask for community input
- What if your community changes?
  - Immigration, out-migration
  - Changes in demographics (age, diversity, affluence, etc.)
  - New museum with competing or complementing mission
  - Another museum closes – who will serve its audience? Do you want to?

What Do Museums Collect?

- Museums *may* collect anything
  - Living/non-living collections
  - Manuscript, book, 3D, textile, furniture, vehicles, aircraft, art, video, audio, etc.
- How do you build a good collection?
  - Take everything?
  - Take nothing?
  - Take only red things?
  - Only old things?
  - Only things that will fit in your storage?
What Do Museums Collect?

- Governed by three things:
  - Mission (overarching, applies to entire museum)
  - Scope of Collections Statement (applies only to the collection)
  - Collections Management Policy (rules that govern collections care and how to manage the collections)

Defining Your Scope

*How do you decide what your museum should collect?*

Not an easy process, it requires some reflection and a critical look at:

- Community: who is your community, and how does the collection benefit or represent it
- Organizational capacity (budget, etc): do you have a budget, paid staff, volunteers, building
- Your existing collection: does it reflect your mission statement

Collections Management Policy

Document that governs museum’s collecting activities & specifies:

- WHAT IS COLLECTED
  - Who is authorized to collect
  - Who decides what becomes part of the collection
  - What are approved uses for the collection
  - What are the criteria for accepting objects/materials (this is called accessioning the object/materials)
  - What are the criteria for eliminating objects/materials from the collection (this is called deaccessioning)
  - What standards must be maintained for the care of your collection (environment, storage, access, use)
Scope of Collections Statement

- Guides your collecting to match mission and capacity
- Helps justify capital and care costs (space, staff and materials)
- Helps in more thoughtful collecting and more meaningful decisions
- Improves donor relations
- Helps create a collection that is an effective tool for programming, exhibitions and education

What’s the Difference?

What is a Good Scope Statement?

- Defines an ideal collection
  - A goal rather than a description of what the museum currently holds
- Supports the organization’s mission
- More narrow than the mission statement
- Uses interpretive words that illustrate the spirit of the community
What is a Good Scope Statement?

- While narrow, it allows for subjective flexibility
- Uses thoughtful limiters
  - Geography
  - Format
  - Object size (be VERY careful!)
  - Format
- Identifies significance as an essential criteria

CASE STUDY

**Historic Stranahan House**

**Mission:**
The mission of the Historic Stranahan House Museum is to tell the story of the birth of our community through the lives of two extraordinary people and the homestead they created and to serve as an enduring legacy for historic preservation.

**Scope of Collections:**
Historic Stranahan House Museum collects objects which are useful for fulfilling the museum’s mission to interpret the life, character and times of Frank and Ivy Stranahan and the community they helped to found. The centerpiece of the museum’s collection is the house itself, which serves as a model of exemplary historic preservation.

The Permanent Collection consists of furniture, furnishings, housewares, books, photographs, paintings, textiles, clothing and accessories, glass, ceramics silver and other metals, and period decorative arts relating to the history of the Stranahans, their home and their relationship to the city of Fort Lauderdale and Broward County.

Statements to Avoid

- One that is as broad or broader than the mission statement
- One that includes limiters unrelated to the mission
  - Must be 50 years old (cuz why?)
- Is a description of the existing collection, rather than a statement of a goal
CASE STUDY
Beatty Museum

Mission:
To preserve in any form the heritage of Beatty, Nevada, the Bullfrog Mining District, the surrounding mining camps of Nye County and any item of historical significance.
To acquire, maintain, own, use for display and demonstrative purposes, any objects reflecting the heritage of Beatty, Nevada, the Bullfrog Mining District, the surrounding mining camps of Nye County, and any item of historical significance.

Scope of Collections:
Historically significant artifacts, documents and photographs that contribute to an understanding of past human behavior, customs, activities, episodes, institutions and personalities, as well as the natural world and earth sciences as applied to our region. The item collected must be in reasonable condition so that the museum can fulfill its goal of preservation with as little alteration to objects as possible. The objects collected should be well documented and such documentation must be verifiable and will include: A chronological history of the object, Circumstances surrounding the objects discovery and acquisition, The original owner or manufacturer, The objects original use, Any other pertinent facts including copyright ownership. The museum may collect artifacts that have incomplete documentation as long as they contribute to a clearer understanding of significant elements of our cultural or natural history and as long as it is established that the item was legally obtained. Objects collected must be useful in the museum for display, research and interpretive activities. The museum must be in a position to properly care for the acquired object. The museum will not collect duplicates, unless they serve a useful purpose, or are in significantly better condition than the item currently in the museum’s possession.

Create & Refine Scope Statement

Why Does Museum Collect?
- Preserve material objects of the past to make them available to those in the present and the future, for educational purposes

How Does Museum Collect?
- Gift, donation, bequest, purchase, commission………..

What Does Museum Collect?
- This is determined by the mission statement and is defined through a scope of collections statement
- E.g., 3-D objects, textiles, manuscripts, wall art, folk art, metal, wood........

Your Scope of Collections Statement

Things to consider:
- Is your museum a privately funded non-profit or a publically funded municipal entity?
  - What kind of legal restrictions does this entail?
- Who is the museum for?
  - If a museum’s collection is for the community, who should have a voice in what you collect? E.g., Board members, Volunteers / Staff, City Councils, Museum members, Teachers / Educators, other Community Groups?
- What makes your organization, topic, community significant?
- How will your collection be different from others in area?
- What stories are you trying to tell?
How Do I Write a Scope of Collections Statement?

- What are you going to collect?
  - Types of objects
  - Limits to what you will collect
    - geography
    - time period
    - culture
- Why will you collect – or not collect – specific kinds of objects?
- What is the reasoning behind the limiters?

Impacts of a New Collecting Scope

- Less collecting
- Culling (deaccessioning objects that do not match your scope)
- More purposeful collections and collecting campaigns
- Active, not passive, collecting
- New audiences
- Collection is a more effective tool for programming
- Less costly collections care
- Negative reactions from community – Communication is KEY!
  (If you are thoughtful, purposeful and involve your community, you can minimize negative reactions)
- Positive reactions from community
- Collection matches mission and organizational capacity

Collections Planning: How It Fits

- Mission Statement is in place
- Scope of Collections identified
  - Identifies what types of objects / materials will be collected
  - Excludes those objects that do not fit within the mission of the museum and the identified scope of the collection
  - Guides culling of the collection through deaccessioning if necessary
- Collections Planning begins
  - Goals identified in the scope of collection will guide the strategic plan for the museum
  - A collections plan, as part of the strategic plan, will help guide the collecting policy
  - Sets up criteria for 5-10 years, helping museum boards, directors and staff identify needs within the museum
What Is Significance?

- ‘Significance’ refers to the values and meanings that objects and collections have for people and communities.
- Incorporates all the elements that contribute to an object’s meaning, including its context, history, uses, and its social and spiritual values.

**WHAT VALUES COULD BE ASCRIBED TO YOUR COLLECTIONS?**

Source: Kylie Winkworth and Roslyn Russell, Significance 2.0: A guide to assessing the significance of collections
What Is Significance Assessment?

- **Systematic approach** to determining the significance of an object or collection in relation to your institutional mission and scope of collections
- Process of researching and understanding the **meanings and values** of objects and collections
- Uses a stepped process and **consistent criteria**

Who Determines Significance?

- Collections Management Policy (the rules that govern the collection) should spell this out
- Normally a committee decision (committee members can be staff, volunteers, board members and others from the community)

Significance vs. Ranking

**SIGNIFICANCE ASSESSMENT**
- Time-consuming
- In-depth research & analysis required
- Creates narrative argument for an object’s significance relative to the collection as a whole

**CURATORIAL RANKING**
- Fast
- Relies on curatorial knowledge
- Can provide statistical overview of collection if completed for every object
Why Assess Significance?

Understand and describe how & why an object is significant because:

- With finite resources, it’s not possible to care for every object forever
- Helps guide collections management decisions
- Helps you advocate for your collection

Important Considerations

- Significance is not the same as monetary value.
- Significance is relative and context-driven. It may change over time.
- Hard to be objective.
- Many objects evoke strong reactions in us.
- In order to make sure the collection fulfills a meaningful scope that relates to and supports the mission, we need to be aware of BIAS.

Bias Relates to Significance & Scope

- Without a defined scope, individual bias becomes the guide.
- Over time, collections without scope reveal their biases.
- Scope helps us define not only what we collect, but for whom. > We collect for the community, not ourselves.
- Significance Assessment & Scope Statements are produced collectively and are codified in writing.

bi-as / bias/ [noun]
Prejudice in favor of or against one thing, person, or group compared with another, usually in a way considered to be unfair.
Determining Significance

What are some criteria for significance?

- **Age**
  - NO*
- **Meaning**
  - YES
- **Use**
  - YES
- **Owner**
  - YES
- **Monetary Value**
  - NO
- **Community Connection**
  - YES
- **Story**
  - YES
- **History**
  - YES
- **Artist or Maker**
  - YES
- **Volume**
  - Possibly*

Significance Assessment Tools

**SIGNIFICANCE 2.0**
- Collections Council of Australia
- In-depth approach to researching and assessing significance for individual objects or entire collections
- Published in 2009
- Single PDF download


**SIGNIFICANCE 3.0**
- Collections Trust UK
- Collections review process leads to significance assessments
- Published in 2018
- Downloadable templates for procedural elements

[https://collectionstrust.org.uk/resources/reviewing-significance-3.0/](https://collectionstrust.org.uk/resources/reviewing-significance-3.0/)

Source: Kylie Winkworth and Roslyn Russell, Significance 2.0

A guide to assessing the significance of collections
Analyze & Research Your Object

- Gather any information you have about the object.
- Carefully observe and document the condition and material composition of your object.
- Research the history and provenance of your object.

Compare Object With Similar Objects

- Do you have similar objects in your collection?
- Research reference material.
- Reach out to other museums with similar holdings.

Use Specific Assessment Criteria

- Four areas of value will help determine significance:
  ✓ Historic
  ✓ Aesthetic
  ✓ Social or Spiritual
  ✓ Research Potential
- Additionally, consider:
  ✓ Provenance
  ✓ Representativeness
  ✓ Rarity
  ✓ Physical Integrity
HANDS-ON ACTIVITY #2
SIGNIFICANCE ASSESSMENT

1) Divide into three groups (mix of museums in each group) and claim your three objects per group.
2) Review the Mission and Scope of Collections for the Animal Toy Museum (5 minutes).
3) Using the questions, evaluate the significance of the three objects provided from the Toy Animal Museum. You may want to divide up your 3 objects within your group (15 minutes).
4) Regroup for discussion of issues identified (10 minutes).

AFTERNOON BREAK – 15 minutes

COLLECTIONS POLICY
More to come in Month 4
What is a Collections Policy?

Detailed written statement that lays out what the collections are & how they are:
- Acquired
- Cared For
- Monitored
- Documented
- Used
- Dispossessed

Why Have a Collections Policy?

- Adherence to Mission
- Comply with Laws & Ethical Responsibilities
- Guides Staff, Board & Volunteers
- Set Expectations for Potential Donors
- Meet Standards and Strive for Best Practices in Stewardship
- Promotes Consistency & Accountability

Elements of a Collections Policy

1) Purpose of museum, policy, statement of authority
2) What the museum collects (scope of collections)
3) How it complies with legal and ethical obligations
4) Acquisitions & Accessioning
5) Deaccessioning & Disposal (and use of proceeds)
6) Collections Care
7) Loans (incoming, outgoing, or none at all)
8) Documentation & Inventories
9) Access & Use of collections and records
10) Who approves policy and frequency of review
**Policies vs Procedures vs Plans**

<table>
<thead>
<tr>
<th>Policies</th>
<th>Procedures</th>
<th>Plans</th>
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<tbody>
<tr>
<td>• Establish standards &amp; values</td>
<td>• How to do things</td>
<td>• Goals, why, by whom, and with what resources?</td>
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<tr>
<td>• Framework for decisions</td>
<td>• Mechanisms and instructions to implement policy</td>
<td>• Strategic plan for collections</td>
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<tr>
<td>• Define authority &amp; responsibilities</td>
<td>• Succinct actions &amp; steps</td>
<td>• Specific goals for particular timeframe</td>
</tr>
<tr>
<td>• Guidelines for situations</td>
<td>• Done by staff - do not have to be approved by governing authority</td>
<td>• Timelines and responsibilities</td>
</tr>
<tr>
<td>• Approved by governing authority</td>
<td>• Not time limited but may evolve</td>
<td>• Resources needed (both $$$ &amp; human)</td>
</tr>
<tr>
<td>• Not time limited but may evolve</td>
<td></td>
<td>• Time bounded</td>
</tr>
</tbody>
</table>

**Monopoly**

- **MONOPOLY** = board game based on John E. Simmons' *Things Great and Small: Collections Management Policies*. Collections policies are very important, but preparation can be tedious. Instead of interminable deliberations about collections management policies, your team can have your discussions while having fun playing a game.
- FREE download from Museum Study LLC
  [http://www.museumstudy.com/courses/course-list/monopolicy/](http://www.museumstudy.com/courses/course-list/monopolicy/)

**HANDS-ON ACTIVITY #3**

**MONOPOLICY: PLAY THE GAME**

1) Break into 5 groups and read the game directions.
2) Play Monopoly (30 minutes).
   - Find solutions to museum collection problems using the policy and resource cards and through discussions with your fellow players.
   - Try to solve immediate problems, but also consider long-term issues that may need to be resolved.
3) Regroup for discussion of issues identified during game (15 minutes).
WRAP UP

Quick Recap

What We Have Covered Today:

- Complexity and ethics underpinning collections stewardship
- How refining scope of your collections helps make your collection more effective
- How to assess the significance of objects within your collection
- Importance of collections policy to guide decisions and ensure consistency

Recommended Resources for Today

- American Alliance of Museums Collections Management Policy overview
- Association for Registrars and Collections Specialists (ARCS) http://www.arcs.org/
- Australian Museums & Galleries Association of Victoria (AMaGA) Online Resources
  https://www.nps.gov/museum/publications/handbook.html
- Reed, Caroline, Redefining Significance 2.0: A Framework for Assessing Museum, Archive and Library Collections’ Significance, Management and Use, 2018
  https://collections.nort.uk/resources/training-significance-2-0/ [See HANDOUT]
- Simmons, John E., Things Great and Small: Collections Management Policies, Rowman & Littlefield, 2018
YOUR ASSIGNMENT

1) Play Monopoly game with your museum team (and any other relevant stakeholders)
2) Create a Significance Assessment for 2 important objects from your collection
3) Draft a Scope of Collections statement for your museum (or revisit existing scope statement)
4) Based on your self-assessment, work with your Mentor to implement at least one additional project for this module.

Possible Projects for COLL

- Collections scope statement
- Collections management policy
- Collection plan
- Code of institutional ethics section that addresses collections
- Collections committee procedures
- Registration & cataloging system
- Collections management forms (e.g., donor, loan, condition report, etc.)
- Collections inventory
- Records management policy and schedule
- Off-site back-up of collection records
- Plan for addressing old loans and undocumented collection items (ref UT abandoned property laws)
- Establish collections preservation toolbox and resource library
- Assessment of collections on exhibit for proper preservation methods
- Plan to re-house a portion of collection in proper materials
- Conservation plan for specific item in need of professional conservator
- Fundraising plan for collections care supplies, equipment, or conservation
- Emergency preparedness plan and creation of disaster kits
- Environmental monitoring and/or control plan
- Housekeeping plan and training
- Collections storage access policy
- Collections preservation toolbox and resource library
- Assessment of collections on exhibit for proper preservation methods
- Plan to re-house a portion of collection in proper materials
- Conservation plan for specific item in need of professional conservator
- Fundraising plan for collections care supplies, equipment, or conservation
- Emergency preparedness plan and creation of disaster kits
- Environmental monitoring and/or control plan
- Housekeeping plan and training
- Collections storage access policy

COLL Module Checklist

- AUD post-module assessment done by 7/28
- COLL pre-module assessment done by 7/15
- COLL project identified and recorded in assessment spreadsheet done by 8/26
- Month 3 September Mentor Site Visit (date & time) scheduled by 8/26
Getting Your StEPs Certificates

- Remember your institutional commitment
- Apply for Bronze but shoot for beyond
- Applications in your StEPs Workbook (at end of each module section)
  - Fill it out using your post-module self-assessment
  - Send to AASLH
  - If you are unsure of your organization’s institutional member number, Jennifer can help connect you to AASLH
- When you get the certificate, take a picture and send it to us!

We Got Money for You!

- Project funding for Year 1 projects to assist in achieving Bronze level or higher
- Up to $1,500
- Application closes August 30

Eligibility

- Are a Certified Utah Museum
- All pre- and post-self assessments completed for all 3 Year One modules
- Achieved Bronze Level Certificates (or higher) for each StEPs Standards module covered in Year One modules (MVG, MGMT, AUD) or provide evidence in your application that the project for which you seek funding will help you achieve a Bronze level or higher
- Have sent one to two staff members/volunteers to attend all program-related activities for each StEPs-UT module
- Have followed through with workshop assignments related to your projects
- Have participated in mentor site visits (month 3 of each module) and worked in good faith with mentor

Project Funding: Online Application

Find link at https://artsandmuseums.utah.gov/steps-ut/
Wrap-Up

- **STEPS-UT** is a partnership between the Utah Division of Arts & Museums, Utah Humanities, and Utah Division of State History, and is supported by funding from the Utah Department of Heritage & Arts, the State of Utah, and the National Endowment for the Humanities.
- Thanks to AASLH and AAM for valuable resources.
- Questions? Anything else? Nametags to the basket please.
- Mentor & Mentee Break-out Groups until 5pm.

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