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Field Service Alliance Winter meeting Austin, TX February 17-19, 2008

Attendees:

Laura Casey and Carlyn Hammonds (Texas Historic Commission)
Jody Blankenship and JD Britton (Ohio Historical Society)
Brian Crockett (museum consultant)
Cindy Gardner (Mississippi Archives)
Chris Goodlett (Kentucky Historical Society)
David Grabitske (Minnesota Historical Society)
Jeff Harris, (Indiana Historical Society)
Carol Harsh (Smithsonian Institution)
Bethany Hawkins and Terry Jackson, (AASLH)
Steve Sterns (National Guard Bureau)
Jerome Thompson (Iowa Historical Society)
Larry Wagenaar (Michigan Historical Society)

Sunday, February 17

Office Updates

- Jermon Thompson (**IA**) is in his fourth year in the local history office. He administers 8 historic sites, works with historic preservation office and with the grants office. Offers SOS grants that includes general operating support up to \$1500. Total pool \$45K.
- Carlyn Hammonds (**TX**) works with 524 local organizations to conduct the AASLH and IMLS needs assessment program. Processes technical assistance requests and works with 13 museums in \$10K grant program on collections based projects.
- Cindy Gardner (**MS**) is the only person in the office and operates 2 separate grant programs of \$1M each. She is participating in the AASLH/IMLS standards project and the department liaison to the MS Historical Federation. They have about 45 members and want to find ways to increase the number of members.
- Jeff Harris (**IN**) has been at the IHC for 9 months. The local history office has a part-time person and is hiring a 1/2 time person. They work with Local History Partners and operate a \$50K grant program, and does about 30 assessments per year. IHC is looking for ways to be more accessible including a touchscreen to each county.
- Chris Goodlett (**KY**) was recently hired and is only field services person in the office. They give out \$7500 in grants each year. Liaison to state association. KHS receive \$4M for the Lincoln Bicentennial, including \$85000 to give out in grants, and is hoping to leverage additional grants.
- Terry Jackson (**AASLH**) operates the bookshelf project giving out \$800 of technical books to deserving museums across the country. Second round about to begin.
- Bethany Hawkins (**AASLH**) manages workshops and technical assistance programs and is the editor for Dispatch

- JD Britton (**OH**) has been at the OHS since 1988 and partner with OAHSM since 1981. He manages the workshops, newsletter, annual meeting, and marker program. Local history is becoming a large outreach program.
- Jody Blankenship (**OH**) he manages K-16 outreach to faculty, teaching American History grants as well as other grants; runs History Day; manages the OH History Resource website, and is part of the Buckeye Council for History Education, which is expanding.

Discussed plans for the 150th anniversary of the Civil War. IA and KY would like to hire a coordinator to encourage communities to do related programs and to designate Civil War heritage sites. MS talking about developing a Civil War commission and wants national legislation to oversee the initiative.

Monday, February 18, 2008

General Welcome (David Grabitske)

AASLH update (Bethany Hawkins)

- Update on the AASLH **national conference** to be held in Rochester, NY in September, with the theme, “Discovering the Power of Transformation.” Program committee has reviewed 139 proposals. FSA will be celebrating our 20th anniversary. FSA meeting will be on Tuesday, September 9, from 1:00 to 5:00.
- Update on the **workshop series**. There are three new workshops on digitizing audio collections, civic engagement for historic sites, and a collections camp on textiles. The new on line workshop is on board development. The 2009 schedule is currently being planned, and they are looking for sites to host the workshops. Helping to host a workshop is a way that FSA can partner with AASLH to provide services to our constituents.
- AASLH has 2 new **affinity groups** including one called “visitor’s voice” (evaluation) and another one for state capitals
- **Standards project’s** pilot stage will begin in March. Over 80 volunteers involved in the project. They hope to launch the final project in June 2009
- **Performance management program** allows sites to set benchmarks and track their development. Kentucky has launched an interesting model. They received a grant from the Lincoln Bi-centennial and grouped numerous sites together to go through the process together.
- Seminar for historical administration (deadline March 15)
- Information on Federal formula grants posted on the website
- First year of three year operating plan for AASLH. Survey will come to all the members so that AASLH can be sure they are offering what the field need
- Terry Jackson reported on the **IMLS bookshelf project** providing resources to small and medium size museums and libraries for collections care. Retail value of the books is over \$800. Over 91% of people who apply get the bookshelf. Need more small and medium sized museums to apply. Applications accepted from March 1 to April 30, 2008. This is the last time to apply for 1000 more book sets.

RIP Guardian Program (Anne Shelton)

Cemetery preservation, in the RIP Guardian Program (record, investigate, and protect), is part of the Texas Historical Commission in Texas that helps local volunteer groups take charge of neglected historic cemeteries across Texas by providing education, consultation and assistance to preserve these important cultural resources. Initially they developed a Historic Texas Cemetery Designation to help preserve old cemeteries. The program was modeled after the successful Adopt a Beach or Adopt a Highway program (e.g. as a public/private partnership, fundraising). These programs have on-line training materials that can help in your thinking about starting a cemetery preservation program. A transportation enhancement grant enabled THC to document cemeteries in 49 counties, contractors surveyed 50,000 cemeteries and determined that 37% are endangered. They started with 3 pilot projects and then began to identify cemeteries and reach out to volunteers. Currently there are 23 groups working across the state, clocking 1500 volunteer hours. RIP Guardian program consults with the local programs and helps to educate them about different ethnic sites and other laws related to allowing access to the cemetery.

Local contacts, who are interested in preserving a cemetery, receive an introduction with a code of ethics, guidelines, and standards. They sign the code of ethics, as done by archeological stewards. There is no fee to join the program, but they get a guidebook that includes samples of materials, information about how to photograph and map the site. They get a THC designation that records what they are doing. Many groups research and plan what they want to accomplish, and host publicity and fundraising events. Volunteers are usually descendants, 4-H groups, national honor societies, civic clubs, etc. More information can be downloaded at www.thc.state.tx.us/cemeteries/cemrip.html or by contacting Anne Shelton, P.O. Box 12276, Austin, TX 78711-2276, 512-475-4506.

IMLS Needs Assessment (Brian Crockett)

Brian is the director of the IMLS needs assessment project administered by Mid-America Arts Alliance. The needs assessment has been conducted in OK, KS, MO, TX, AR, and NE. Project includes a written survey, interviews with museum service organizations, and on-site visits conducted by Brian, both primary and secondary visits. The response rate is about 30%. In AR, history museums comprise 64% of all museums in the state. MO has 85% history museums and 10% art museums. Interesting to note that the results indicate that there are fewer and fewer full time volunteers in museum. Data shows some interesting information about annual operating budgets: 1/2 of all museums in MO have budgets under \$25K. In Arkansas 2/3 museums are operating with less than \$25K annual budget.

The utility of state needs assessments is centered in leveraging support. States have used the data in different ways. In AR, the assessments were used to try to restore budgets to previous levels. In OK the results helped the museum association determine what work they needed to provide. The field should abandon the talk about need and talk instead about worth and service. The data should be used to document change in the field. Summary information of state surveys is on Mid-America Arts Alliance website.

IMLS Collections Care planning grants (Danielle Plumer)

In the next few years IMLS wants every state to get a grant to plan for collections care needs. So far, 19 states got grants out of 26 proposals to coordinate statewide efforts for collections care. Eventually, a few states will get a much larger amount of money for full implementation. Collections care needs are universal, environmental needs, disaster planning, etc. A meeting of state organizations in TX revealed that needs had been documented by various organizations, but no one has ever looked to see where they overlap. Need a meta-analysis to put together some longitudinal information. How do we advocate for public funding to make the studies meaningful? They decided to find out what people have in their collections and to start

with a survey of 200 institutions. They will meet three times to talk about digitization issues, and conservation concerns. They will take the results of the survey to the legislature to try to get state funds that will pass through to the smaller organizations. They will compile the lists of all the institutions (libraries and museums) in the state and geo-code the data and put it on the web for disaster planning. State agencies will work together to streamline efforts.

Exploring Organizational Poverty (David Grabitske)

FSA is working to develop a meaningful measure of need among their clients that would prove useful to field services professionals. It could also be a tool to measure need among museums and to make a case for support from potential supporters. The tool is needed, but we need to make sure it measures both need and worth of the small museums. We need to eliminate ideas of “not worthy”, but instead identify those organizations that have needs and goals to solve the problems. Service providers need to be careful not to over stretch but work towards achievable goals. Assessing organizational health is important, and the process needs to be quick and easy to for field service officers to determine.

Goal for today is to discuss this tool to see if it is viable for FSA to use in our offices. Suggestion to build in initial screening questions to determine if they have achievable goals and an organizational desire to change (for instance, board resolution to move forward). Maybe we should incorporate trending up or trending down rather than giving them a score. This tool could help direct the conversations field service officers have with museums to determine where they are professionally.

How does this dovetail with incremental standards? An assessment tool is built into the process. This tool would be used by field service officers as they work with museums. It would enable sensible change for an organization. Avoid the assumption that “more is better.” It needs to consider both organizational strength and the product that they produce, and how well they collaborate with other organizations. Historic houses committee has a checklist that lists characteristics of sustainability for small museums that could be incorporated somehow.

MN, KY, IA and the National Guard Bureau will take the document and try to adopt it to see if it helps them access organizations in the work that they do. They will report back to the group in Rochester.

Tuesday, February 19, 2008

FAT exercise (lead by David Grabitske)

FAT exercises were originally developed by John Harris to allow museum professionals to discuss various crisis scenarios and find some solutions by discussing “factors”, “actions”, and “techniques”. Participants were divided into two groups to discuss the following two scenarios. Group recommendations follow each scenario.

- (1) The CEO or Commissioner of your agency is facing rough decisions about trimming the budget. She visits you one morning and says, “I need you to propose how you can raise additional revenue from the local history community as we can’t afford to continue giving away our resources. I can’t justify the expense when we’ll have to layoff a number of your co-workers.”

You have a week or two to respond, but you begin preparing a response immediately. What will you do?

FACTORS

- a. consult legislation to see if we are obligated to provide services for free.
- b. Explore ways that the office can operate more efficiently, using email or mail when possible rather than site visits
- c. Determine if the budget cut is long term or short term situation
- d. Determine if the local history office has the opportunity to raise money
- e. Decide what could/should be cut
- f. Explore how such a cut would impact constituents
- g. Think about the impact to the local history office if experienced staff is cut

ACTIONS

- a. Develop an advocacy plan about how local history pacts communities (collect testimonials)
- b. Write the proposal to the CEO about how the local history office will deal with the budget cuts

TECHNIQUES

- a. Gather legislation/administrative data (strategic plan,etc.)
- b. Gather information on the causes of the crisis
- c. Survey other local history offices and compare training with states that lack field services
- d. Gather information through the FS list
- e. Survey local history organizations to find out how many use services; what and what would be an acceptable fee for various services
- f. Find out how budget cut impacts whole organization and determine what the other departments are doing
- g. Conduct internal audit; talk with staff about programs and evaluate data gathered from other local history organizations
- h. Identify friends in the legislature and who would advocate for local history
- i. Draft proposal showing how we can raise funds from the local history community
- j. Develop partnerships with sister agencies to continue level of service

- (2) Agnes, the long time president of Post Oak County Historical Society who in her last 6 or 7 years had not called you much, died. You attend the funeral and speak with several board members. In the conversation it becomes clear that Agnes always kept her contact with you secret and the board believed Agnes leadership had been practical. Therefore the board members do not see the value of your services as “anyone can successfully operate an historical organization, just like Ages did.”

How do you continue to help POCHS?

FACTORS

- a. Agnes is dead; died with a secret, that she had FS paranoia
- b. Agnes did good work with FSA help
- c. POCHS is in the dark (they believe all is okay)
- d. Even with Agnes gone nothing will be different
- e. FS officer is at the funeral
- f. POCHS doesn't know the questions
- g. POCHS is a volunteer organization and Agnes had been president for a very long time
- h. Why didn't FS officer contact her after a period of silence? (too much time spent on “hot” calls)

ACTIONS

- a. Introduce yourself at the funeral

- b. Say to POCHS how you will miss chats with Agnes
- c. Continue to communicate
- d. Don't force yourself into the new situation but offer services in the future; give and send a description of services offered
- e. Follow up after a while
- f. Know your "authority" to do what you do

TECHNIQUES

- a. Don't do interventions (not FS role)

Conflict Resolution (Madeline Maxell)

Madeline has done mediation with university students for several years.

Quick tips for conflict resolution:

Practice active listening.

Don't assume you know what people mean. Ask questions.

Never ask why something has happened?

Questions beginning with "when" and "can" are the most disarming types of questions to ask.

Ask when things changed for them?

Why questions become a challenge. Get at "why" without asking "why"?

Field Services officers are often between people, or the outsider who can help. She asked us to do an exercise on "strategic listening". Active listening is what you do when you make people feel good about talking with you. It varies due to cultural customs "Strategic listening" helps to solve problems by figuring out what other people mean by what they say. People often assume that you mean something by what you say because of their feelings about you or the situation. There is a rubric to use to unpack a conflict situation. The word to remember is "epic". (Emotions, process, identity, and the cosmic meaning).

Identify the **emotions**. (annoyed, offended, discriminated)

How does **process** influence what he says? (how should people behave)

Find out the **identity** issues. (how does he make you feel about yourself)

What is the **cosmic** meaning? (what does it tell you about the world)

Figure out the issue without giving advice. Solve the problem without solving their souls, the root of the problem. Organizations can get into arguments without really understanding that the process or the interpersonal relationships are really the problem.

In conflict resolution, different aspects of the resolution mean something different to different people. Different aspects of what is going on matters differently to different people based on our cosmic understanding of the situation. So in the agreement, if we deal with all of the epic points as well as all of the issues, then the agreement holds. If we have the repetition of arguments, then the real issue wasn't really solved. We become aware of the other elements when something goes wrong.

Five key concepts in Conflict and Communication

Community identity – difference in language use can create an insider or an outsider relationship. As field service officers go in to help solve the problem, the insiders can bond together because they understand each other from having communicated over time.

Ideology and Cultural Resources – symbolic resources available in a particular culture make language-in-action work. When you get in a conflict with people we are likely to take what they say in the wrong way.

Stigma – ways a particular culture constitutes or stylizes social and political differences, like relationships of power, including antagonisms, competitions, debates, disputes, etc.

Communication style – our style of communication can set people off. Use the question, “can you say more about that?” in order to clearly understand what they intend.

Mind-reading and uncertainty reduction --- You have to be a mind reader to be efficient, so we have to assume that we don’t know what people mean. We sometimes blame others for something that we forgive ourselves for doing.

As a mediator you need to help them negotiate what the real problems are so that they can figure out a way to manage the problem. Sometimes understanding satisfies people even when you don’t get agreement.

A “working relationship”, is the concept that we want to like the people that we work with and if we don’t we fixate on the problem. An alternative is to leave the baggage there, but agree to work effectively in spite of the problems. Trust can be re-established.

FSA 20th anniversary plans

Plans are being made for the 20th anniversary of FSA at the Rochester meeting. Long time FSA member and retired field service Tom McKay is writing the history of the organization to commemorate the accomplishments of the organization. JD Britton is helping Tom.

Standards discussion (JD Britton)

Standards will help us in our work with our constituents and be a helpful tool. The standards tool is very complex. Service providers are working with organizations that are dependent on us. March 16 will be the beginning when the pilot organizations will test the standards, but the content of the standards are not fully fleshed out. Need the self evaluation and the final version of the standards.

Meeting adjourned at 12:00