

For the Facilitator
AAM Core Document Workshop Activities—Summary, Details, Instructions

There's at least one activity associated with each Core Document. In some cases there is more than one, or one with multiple parts. (If you don't have the full day available, pare down to one for each core document.) Based on your group size and dynamic adapt the timing, engagement, and reporting out strategies listed to best suit the situation. Expect and encourage discussion and questions.

All activities are in the Workbook with general instructions for the participant and space to do the work. Pages are listed below.

Except where noted, no supplies are needed.

Approximate time to spend on each activity (including any reporting out) is noted but adapt to your situation.

Tip: at the end of each activity/activity group, remind the attendees to make any notes in the Action Plan section at the end of the Workbook regarding what the activity revealed to them.

Activity #1

What I want to get out of today

Module: Introduction

Workbook: Page 1

Summary/Instructions:

Ask attendees to use the page in their workbook to jot down their objectives for the day.

Report out: Ask for a few volunteers to share.

Timing: About 3-5minutes

Notes: Alternative formats: Depending on the group size and the space, you could have everyone write one or more objectives on a Post-It and have them post on a wall or some flip chart sheets. Then you could survey the answers and call some out, or highlight some themes. This will take a bit longer than 5 minutes. You can also combine Activity #1 into the introductions if you have a small group. Have everyone write down their objectives right off the bat and then have them list one as they introduce themselves.

Activity # 2 (A-B-C)

Mission: Does Your Mission Measure Up?

Module: Mission

Workbook: starts on p. 7

Part A: Examples

Summary: Attendees read the 3 mission statements and then write down what aspects they like in each.

Workbook: page 7-8

Instructions: Read the three mission statements below, then use the space provided to list the aspects of each that you like. Think about why they resonate with you.

Reporting out: Ask for volunteers share their thoughts on each one

Timing: About 5-7 minutes

Part B: Before and After

Summary: After hearing a scenario of a museum that changed its mission, participants compare the before-and-after versions of two museums' mission statements and describe what was changed and improved.

Workbook: p. 9-10

Instructions: Compare the before-and-after versions of two museums' mission statements below. Describe what was changed and improved.

Reporting out: Ask for volunteers to share their thoughts or discuss with tablemates

Timing: About 5-6 minutes

Part C: Assessing Your Mission

Summary: The participants look at their own mission statement and evaluate it against a series of questions related to the Required Elements.

Workbook: p. 10-11

Instructions: Look at your museum's mission statement. Compare it to the three Required Elements, then answer the series of questions about it.

Reporting out: Ask for volunteers to share some of their results and what they realized about their mission statement from the activity (or this series of mission activities)

Timing: About 7-8 minutes

Activity #3 (A-B)

Code of Ethics: Are You Covered? & What ethical issues could your museum face?

Module :Code of Ethics

Workbook: starts on p. 14

Part A: Are You Covered?

Summary: The presenter reads three imagined ethical scenarios taking place at the Punxsutawney Groundhog Club Museum (PGCM). The participants must come up with the ethical issue and the related standard/required element that the scenario raises. Participants are asked to think about their museum's code of ethics and consider if it contains elements that would help to guide the museum's decisions and appropriately handle the scenarios presented.

Workbook: p. 14-15

Instructions: For each of the three scenarios, read the scenario on the slide (or ask a volunteer to do it) and then ask the group what ethical issue does this scenario raise. Get some discussion going and then use the notes under the slides for the formal answer/content. There's 'on click' animation on each slide that reveals a statement about how the issue should be addressed in the code of ethics. There's a spot in the workbook for the attendees to write this (and the ethical issue) down.

Reporting out: N/A; it's a group discussion as the activity progresses

Timing: About 20 minutes

Part B:

Summary: After some commentary by the presenter, participants think beyond the required elements (using the list of possible topics provided), and are asked to think about the types of ethical issues and conflicts that may be unique to their museum, or the area of operations they focus on (e.g., who they take money from, collections issues).

Workbook: p. 16

Instructions: Read the intro: "There are issues common to most museums and thus common elements most codes should contain as a matter of best practice—see the list of topics on p. 13 of the Workbook. But codes must to be tailored to the museum. Ethical issues will vary from museum to museum depending on subject area, mission, values, programming choices, activities, governance, and other factors. For example, do you collect or display sacred objects or human remains? Do you deal with living artists, or with sensitive historical or contemporary subjects?" Give attendees time to think about the types of ethical issues and conflicts that may be unique to their institution, or the area of operations they focus on (e.g., development, collections), and write them down in their Workbook.

Reporting out: Optional

Timing: About 15 minutes

For the Facilitator:

Activity #4 (A-B)

Strategic Planning: Engaging Stakeholders in the Planning Process & Assess Your Plan Like A Pro

Module: Strategic Plan

Workbook: starts on p 19

Part A: Engaging Stakeholders in the Planning Process

- Summary: Participants list their museum's internal and external stakeholders. They then select three stakeholder groups and list ways they can engage them in their planning process
- Workbook: p. 19
- Instructions: Direct attendees to p.19 of the workbook and have them complete the activity.
- Reporting out: Ask for volunteers to share some of their results about *external* stakeholders and ideas they came up with to involve them in the planning process.
- Timing: About 20 minutes

Part B: Assess Your Plan

- Summary: Participants evaluate their plan against a series of questions and other criteria listed and make notes on areas in which their plan should be strengthened.
- Workbook: p. 20
- Instructions: Ask participants to think about their museum's own plan—if they have one—and evaluate it against this the list of Required Elements (on p.17), the sample content list (on p. 18) and the questions in the workbook on p. 20. Make sure to say that *if anyone doesn't have a plan they can evaluate* that they should review the items on p.17-18 and, think about the results of the last activity on stakeholders, and begin to think about what steps they need to start putting in place to work towards developing a plan; they can put notes in the action plan section at the end of the workbook.
- Reporting out: Optional
- Timing: About 20 minutes

Activity #5

Collections Management Policy Bingo (Bingo Cards are at the end of this document)

- Module: Collections Management Policy
- Summary: Each participant gets a bingo card; the text in red is a Required Element and the text in blue is a best practice. The facilitator calls out all the topics on the card, pausing to offer commentary on those associated with Required Elements. Participants mark squares as the topic is announced out and call Bingo. The objective is to highlight the Required Elements—as the minimum part of a CMP—and raise awareness about all the other topics that it's best practice to include.
- Workbook: Starts on p. 23
- Instructions: There are five slides associated with this activity (#51-55). They are animated; each click brings up bullet point. Use the individual, color Bingo cards, not the one in the Workbook. On the slide, the Required Elements are in red and in the notes they are underlined. On the card the text in red is a Required Element and the text in blue is a best practice. (The black & white version in the workbook has the Required Elements bolded.)

Here are the verbal instructions to give to the participants at the start of this activity (from notes under slide #50):

"To see whether your museum's Collections Management Policy includes the required elements plus addresses some extra topics to make it robust, I'm going pass out* these BINGO cards which have different Collections Management Policy topics listed in each square. As I call out the following sections of a Collections Management Policy, mark it off on your BINGO Card. You will notice some topics are marked in red and some in blue. The red topics/phrases are the Required Elements. The blue topics are best practices; I strongly encourage you have them in your policy. You can call out "BINGO" if you checked off the topics on your bingo card in a row across, a row down or diagonally."

- Reporting out: N/A
- Timing: About 20 minutes
- Notes: This is modified Bingo since eventually everyone will get Bingo as all the cards have all the topics. We provide the templates in your materials for 8 different versions. There's a bingo card in the Workbook but everyone's is the same so that one's best used for a do-at-home version or just for reference.) If you need to save time: don't read the descriptions for each term, only the ones in red on slides and underlined in the notes under the slides.
- *Handout when you get to this point or put in the handout packets everyone gets at the beginning of the day.
- Supplies: Bingo cards (print in color from the file called "Bingo cards—8 randomized).

Activity #6: Emergency Preparedness and Disaster Response Plan: Create Your Risk Profile

Module: Emergency Preparedness and Disaster Response Plan:
Summary: After discussing Emergency Preparedness and various types of threats participants are challenged to draw a map of their museum's geographical surroundings (going as local or regional as they like) and one of the physical facilities. They must consider what's unique about their community and building and identify some potential natural, biological, mechanical, and human threats that could impact staff, visitor, facilities, and collections. From here they assess whether they have plans and procedures in place to address and manage these risks.

Workbook: starting on p. 27
Instructions: The activity starts after you do slide #62. Leave slide #62 on the screen during this activity. The chart on that slide is also in the Workbook on p. 28. Here are the instructions that are also found in the notes under slide #63. Before the activity pass out colored pencils and large format paper (see supplies below).

- Close your eyes: imagine your museum from a birds-eye view, start about at about a 25-50 mile radius then zoom in to right over the museum. What major features do you see? Is there water? Mountains? Are there any facilities or areas that present any risks to your collections? (military base, nuclear power station, heavy industrial area) What more immediate threats surround your museum? Is there a hospital? A prison? A courthouse? (lockdown, bomb threat). Likewise: what neighbors could be potential partners in the event of an emergency?
- Grab some art supplies: I want you to physically (or mentally) draw a map of your museum's surroundings – the city or town, or the neighborhood. Mark your museum's location on the map. Think about what's unique about your community or building. Then use that map to identify potential natural, biological, mechanical and human threats that could impact your staff, visitors, facilities, and collections. Write these down on page 27 in your Workbook. Do you have plans in place to address and manage these risks?

[if there's enough time, do this part:

- Now identify potential hazards within your own facilities that could pose a risk to the museum property, occupants, and collections. What are your safety and security vulnerabilities? Where are problematic areas

for egress? Do any building systems put collections at risk – are there bathrooms or kitchens next to or above collection storage areas?

- Are there hazards in the collections that staff needs to be aware of? Fireproof objects (cabinets, tiles, safes) from the early 20th century are likely paneled with asbestos. You may know that, but do your co-workers? And does anyone know what to do if one of those panels is broken?
- This is also an opportunity to think about the additional incidents that may occur within your museum walls. Is there a procedure for lost children in the museum?

Reporting out: An ideal way to report out is to have everyone hang up their drawings and have some volunteers explain them. If space, group size, or time is a limiting factor, ask for general feedback from the group about something they realized that they hadn't thought about before (or isn't in their plan, if they have one)

Timing: About 25 minutes

Supplies: We encourage you to provide some colored pencils or crayons, and some oversized sheets of paper for this activity (Legal, 11x17, or just use the flip chart paper

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Activity 7: Taking it Home: Build your Core Document Action Plan

- Module: Taking it Home
- Workbook: Starts on p. 29
- Summary: Participants use the worksheets to start mapping out next steps and building an action plan to create/align their museum's Core Documents with the Required Elements, standards, and best practices. There's a grid or a sheet for each document; participants can use whatever format they like just as long as they write down at some short, medium, and long term steps for at least one document. This is just the starting point. The work has to continue at home.
- Instructions: After you run through slides 67 -72 (FYI there are notes under 67—that's where you first preview the taking it home activity), go over the following instructions (from p. 29 of the Workbook)
- Go through your workbook and look at your activity results and notes. Identify the gaps or weaknesses you need to address in each Core Document.
 - Use the worksheets on the next page to start mapping out next steps and building an action plan to align your museum's Core Documents with the Required Elements, standards, and best practices.
 - List immediate, short, medium, and longer term action steps for each document.
 - Create an overall strategy for completing all five documents or, if that seems like too much right now, pick one document to focus on.
 - Generate at least one or two strong, immediate steps you can take to act on your core documents while the workshop is fresh in your mind.
 - Use the worksheets provided or whatever format works for you—just put something in writing!
- Reporting out: Ask for volunteers to share a short, medium, and long term action step they wrote down, or any other plans and strategies they came up with. This is also a good time to ask for general feedback on how attendees are feeling about their Core Documents
- Timing: About 20 minutes
- Note: If you need to compress for time, here's a shortcut version of the Taking it Home activity called "5-in-5" – Action Steps Lightning round
- In five minutes I'd like you to write down five short or intermediate term action steps you are going to take when you get home from the conference (or sooner!)

Immediate = within the next 1-2 weeks

Short term = within 90 days

For example (make yours specific):

- Give a presentation to my board/director/staff about what I learned
- Share some of the material from today's workshop at next staff / board meeting
- Have board/staff listen to one or more of the Alliance recorded webinars as a group
- Do one of the activities we did here today, or one from the Alliance Activity Guides
- Read the *Museum* article reprint in your folder called "How Can My Small Museum Handle Core Documents Verification?"
- Create an action plan for completing one document
- Join AAM / upgrade my membership to Tier 3 to access sample document

Turn to page 30 of your workbook: put at least 5 items in the first two columns.

Flesh out this grid and use the pages behind it for you to start building out your action plans in more detail when you get home.

Go back and review the results of your activities and your notes—look at where you have gaps between the required elements and your documents, or have questions.

B	I	N	G	O
Mission or Vision	Outgoing Loans	Ethics	Acquisitions	Use of deaccession proceeds
Appraisals	Statement of Authority	Documentation or Collections Records	Unclear title	Date approved
Conservation or Care	Inventories	FREE Storage SPACE	Disposal methods	Categories of Collections
Insurance / Risk Management	Accessioning	Scope of Collections	Glossary	Access or Use
Museum History	Incoming Loans	Intellectual Property or Copyright	Deaccessioning	Review and Revision

B	I	N	G	O
Deaccessioning	Mission or Vision	Review and Revision	Acquisitions	Conservation or Care
Insurance / Risk Management	Accessioning	Statement of Authority	Intellectual Property or Copyright	Use of deaccession proceeds
Outgoing Loans	Scope of Collections	FREE Storage SPACE	History	Date approved
Unclear title	Incoming Loans	Appraisals	Disposal methods	Ethics
Inventories	Documentation or Collections Records	Categories of Collections	Glossary	Access or Use

B	I	N	G	O
Disposal methods	Statement of Authority	Intellectual Property or Copyright	Conservation or Care	Insurance / Risk Management
Inventories	Incoming Loans	Accessioning	Use of deaccession proceeds	History
Ethics	Deaccessioning	FREE Storage SPACE	Scope of Collections	Appraisals
Categories of Collections	Documentation or Collections Records	Mission or Vision	Outgoing Loans	Acquisitions
Date approved	Unclear title	Access or Use	Glossary	Review and Revision

B	I	N	G	O
History	Conservation or Care	Disposal methods	Incoming Loans	Date approved
Accessioning	Scope of Collections	Review and Revision	Documentation or Collections Records	Ethics
Appraisals	Use of deaccession proceeds	FREE Storage SPACE	Acquisitions	Insurance / Risk Management
Glossary	Statement of Authority	Inventories	Mission or Vision	Categories of Collections
Outgoing Loans	Deaccessioning	Intellectual Property or Copyright	Unclear title	Access or Use

B	I	N	G	O
Incoming Loans	Date approved	Insurance / Risk Management	Review and Revision	Disposal methods
Access or Use	Ethics	Outgoing Loans	Mission or Vision	Unclear title
Use of deaccession proceeds	Scope of Collections	FREE Storage SPACE	Inventories	Categories of Collections
History	Acquisitions	Glossary	Statement of Authority	Documentation or Collections Records
Accessioning	Appraisals	Conservation or Care	Deaccessioning	Intellectual Property or Copyright

B	I	N	G	O
Glossary	Inventories	Ethics	Insurance / Risk Management	Documentation or Collections Records
Conservation or Care	Categories of Collections	Use of deaccession proceeds	Accessioning	Appraisals
Statement of Authority	Intellectual Property or Copyright	FREE Storage SPACE	History	Incoming Loans
Review and Revision	Deaccessioning	Acquisitions	Outgoing Loans	Disposal methods
Date approved	Mission or Vision	Access or Use	Scope of Collections	Unclear title

B	I	N	G	O
Appraisals	Documentation or Collections Records	Glossary	Conservation or Care	Inventories
Incoming Loans	History	Accessioning	Insurance / Risk Management	Categories of Collections
Access or Use	Acquisitions	FREE Storage SPACE	Use of deaccession proceeds	Statement of Authority
Scope of Collections	Mission or Vision	Unclear title	Ethics	Date approved
Intellectual Property or Copyright	Review and Revision	Outgoing Loans	Disposal methods	Deaccessioning

B	I	N	G	O
Insurance / Risk Management	Access or Use	Glossary	Categories of Collections	Intellectual Property or Copyright
Mission or Vision	Outgoing Loans	Inventories	Incoming Loans	Appraisals
Acquisitions	Unclear title	FREE Storage SPACE	Date approved	Conservation or Care
Deaccessioning	Ethics	Disposal methods	Accessioning	Scope of Collections
Documentation or Collections Records	Use of deaccession proceeds	Statement of Authority	Review and Revision	History