FIELD SERVICES ALLIANCE

Field Services Manual

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AASLH

American Association for State and Local History

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Philosophy of Field Services

What Is Field Services?

Field services programs believe that local historical societies, museums, planetariums, zoos, archives, and libraries are important to the fabric of our society. These organizations should be encouraged and supported, run in a professional manner, and be recognized as valuable community assets. Field services programs help these organizations achieve best practices and accepted professional standards.

Field services programs, typically located in an organization with a statewide focus, can be managed by non-profit organizations or state government. These entities have personnel with experience working in and with smaller organizations and can provide assistance on a wide range of topics. Field services personnel are approachable and trained to work with organizations that have limited resources.

Why do field services programs exist?

Larger cultural institutions and statewide organizations have an obligation to increase the capabilities of local partners and smaller grassroots organizations within their service area. The Field Services Alliance (FSA) recognizes that the majority of local partners/grassroots organizations are historical societies and history museums, and shares with the American Association for State and Local History (AASLH) a commitment to assist such organizations through the work of field services professionals. FSA also recognizes similar needs in many other cultural and art organizations and that each field services office varies in the type of organization that it assists. This document will often refer to clients and constituents of field services offices as historical organizations or museums with the understanding that other types of organizations are often served, depending on the mission and focus of any particular field services office.

What do field services programs provide?

Strong field services programs have three core components: (1) grants, either through their offices or by offering assistance in finding grants; (2) regular, ongoing, and consistent professionally developed training opportunities for historical organizations or museum professionals and volunteers; and, (3) on-demand consultations, advice, and technical information. Field services offices might also offer additional programs such as historic markers, traveling exhibits, lending libraries, needs assessments, awards programs, and more. This assistance is often free or available at low cost.

Top Ten Characteristics of Highly Effective Field Services Programs

- Provide low-cost training in a variety of formats about a broad range of topics relevant to the field.
- Offer on-site assistance and reliable up-to-date resources for free or at little cost to constituents.

- Advocate on behalf of small museums and historical societies.
- Understand and anticipate constituents' needs.
- Make connections, seek input, and establish ongoing respectful relationships with constituents.
- Have well-trained, highly effective professional staff.
- Receive adequate institutional support for equipment, resources, and staff.
- Pursue continuing staff professional development.
- Make connections and establish ongoing relationships with professional colleagues and develop partnerships with other organizations on a state and national level in an effort to continually expand services and opportunities for their constituents.
- Help broaden public appreciation of the role of history in society.

Who are the people who do field services?

Field services personnel are professional generalists who can provide professionally developed training, advice, contacts, and technical information about every aspect of museum and organizational work, from governance issues and fundraising, to interpretive techniques and membership programs. If field services personnel cannot answer a question, they generally have access to a specialist who can.

Help is a phone call or email away, and field services staff often visit organizations or museums in need of assistance. In the event of a natural or man-made disaster, a field services program can be a first responder for assistance. Typically, these programs can help you navigate state and federal assistance programs and paperwork.

Top Ten Characteristics of Highly Effective Field Services Personnel

- Are patient, respectful, empathetic, discreet, ethical, and professional.
- Have had experience working in local history and have grounding in historical methodology.
- Uphold and effectively communicate professional standards in tactful, clear, jargon-free language.
- Have a good sense of humor and use it effectively.
- Have worked with and value volunteers.
- Are generalists, willing to seek answers and are adept at locating specialized information.
- Are good listeners, counselors, motivators, and teachers.
- Are interested in learning and in expanding their base of knowledge of current standards and professional practices.
- Are good communicators, able to write and speak effectively.
- Are reliable and prompt in responding to constituents.

Field Services Alliance Code of Ethics

Introduction

The motto of field services professionals is, "We aim to be useful." [Rueben Gold Thwaites, Wisconsin, 1904] In a spirit of helpfulness and kindness to clients, field services professionals assume certain responsibilities relative to their conduct in carrying out their duties. Since success in fulfilling professional duties is highly dependent upon cooperative human interaction built on trust, field services professionals strive to maintain the following principles.

I. Services First

a. Field services professionals exist to serve clients. Commitment to helpfulness as the highest standard of services should be reflected in our every action.
b. Field services professionals shall patiently and respectfully advise on any and all options relative to the situation that their client ought to consider.
c. Field services professionals should evaluate options based on their experience, but should not pressure a client to accept that advice.
d. If advice, technical information, visits, or other aid is promised, the field services professional shall render it in as timely a manner as possible.
e. Field services professionals shall render assistance with due diligence to promote client satisfaction and success.
f. Field services professionals shall make every effort to acquire and maintain knowledge of commonly accepted standards and best practices to adequately advise their clients.

II. Respect Always

a. Clients often do not have the resources to exemplify accepted standards and best practices. Therefore it is incumbent on the field services professional to find ways that are within the means of their client to best satisfy most of the standards and best practices.
b. Field services professionals shall not render advice without first being requested, unless unsolicited advice will mitigate imminent danger to the public, the client, or the client's property, reputation, or mission.
c. Respect for the client also means that confidence be kept in accordance with Section III.
d. Field services personnel should not withhold or otherwise limit services to a requesting client on any grounds.

III. Confidentiality

a. Field services professionals are to be absolutely trustworthy with all matters of importance, both public and private, with respect to their clients.

b. In the course of fulfilling their duties, field services professionals may become privy to information potentially prejudicial to the well being of their clients. Sensitive information is, but not limited to:
    i. Direct contact information for client committees and board;
    ii. Direct contact information on client mailing lists;
    iii. Specific pay for employees of client organizations;
    iv. Pending actions of client committees and board;
    v. Appraised values or specifics of client holdings;
    vi. Client security protocols;
    vii. Client financial data; and,
    viii. Locations of client archaeological sites and Traditional Cultural Properties.

c. Disclosure of information noted above may be shared in general ways, such as ranges, averages, and medians for statistical comparison. Other disclosure may occur without any way to identify the client.

IV. Conflicts of Interest

a. Contract Work: Since field services professionals are compensated by their employers for the purpose of providing services to clients, the Field Services Alliance does not support taking contract work from clients as defined by the field services professional's employer.
b. Collecting: Since field services professionals work closely with those who hold in public trust objects of cultural value, the Field Services Alliance does not support its members collecting or competing for collections similar or of interest to clients.
c. Impartiality: The field services professional should consider how any situation meets commonly accepted standards and best practices without favoring either his/her employer or his/her client.
d. Fields services professionals shall not accept gifts from client organizations. Field services professionals may accept items for his/her employer's collection.

V. Emergency Situations

No set of guidelines can adequately predict sudden changes or specific emergencies that may threaten the client's well being. In an emergency, field services professionals should make every reasonable effort to help their clients and strive to follow the principles set out in this document.

VI. Adoption and Amendments

a. This document will stand adopted after a vote at a member meeting of the Field Services Alliance.
b. Any member of the Field Services Alliance may propose amendments. The chair of FSA shall place the proposal on the agenda for the next regular meeting of the FSA, and recommend a committee examine the proposal. A report of

recommendations shall be due two months prior to the annual meeting at which time the membership would vote on the proposed amendment.

Code of Ethics
Adopted 13 March 2006
Field Services Alliance Winter Retreat
New Harmony, Indiana

Making a Case for Field Services
By Robbie Davis

The need for professional assistance for history organizations is strong. As a result, field services assistance is offered at the national, state, and local levels. Every provider is different: sometimes a dedicated office provides outreach to local institutions; a national organization creates initiatives that reach the local level; or an organization empowers its staff to offer individual assistance to other organizations in need.

The result is the same: field services personnel improve professional standards among local history organizations. Perhaps your institution or your state sees a need to support field services responsibilities. Or, perhaps your existing field services operation is endangered due to reduced budgets. This section of the manual provides information about the nature and health of field services organizations and their clients in order to illustrate the need for field services. In addition, the manual provides tips for collecting data to showcase the broader impact of field service assistance among local history organizations.

A Portrait of Field Services Organizations

A statistical view of field services organizations offers a chance to understand how offices are organized, what services they provide and who they serve. The portrait that emerges is of a group of committed professionals from a variety of organizations with many programmatic commonalities. However, as indicated by a 2011 survey of field services offices conducted by FSA, field services programs are far from homogeneous. A total of 27 organizations responded to the survey.

Field Service Activities Are Conducted in a Diverse Way

There is no one-size-fits-all field services office. A preponderance of activities are offered by organizations that have a dedicated field service program at the state or local level. Just under half of all respondents to the 2011 survey noted that they provide services through a "dedicated field service office." For the purposes of the survey, a "dedicated" office means that the parent organization had full or part-time staff members assigned to professional outreach duties. A dedicated field service office may offer a variety of services, in addition to administering grants programs, for local organizations.

As the survey reveals, a significant number of organizations offer assistance through staff members who have other duties. In these instances, conservators, curators, registrars, educators, and other staff members offer field services assistance in addition to their regular duties. These are critical links for small and rural history organizations, often pairing local staff and volunteers with limited exposure or experience in a technical area to professional help that is desperately needed.

How are field services activities conducted at your organization?

	Response Percent
At the state or local level, through a dedicated field services office	**48.1%**
At the state or local level, as additional duties assigned to institutional staff	29.6%
At the national or regional level	22.2%

Private Nonprofit and Governmental Organizations Lead Professional Outreach Efforts

All of the survey respondents were governmental or nonprofit organizations. However, for just over half of the respondents, their responsibilities are conducted under directives from their state or local government.

What best characterizes your parent organization?

	Response Percent
State government	36.0%
Semi-state government agency (has certain responsibilities given to it by the state, but is otherwise a private nonprofit)	12.0%
Local government (city or county)	4.0%
Federal government	0.0%
Private nonprofit	**48.0%**
For-profit	0.0%

Field Services Organizations Do Incredible Work with Limited Resources

The programmatic budgets (excluding salaries) of field services units tend to be modest. In fact, more than one-third of respondents had programmatic budgets of $10,000 or less. Another one-third of respondents had programmatic budgets between $10,000 and $50,000. Considering the amount of travel involved in field services work, this is an impressive statistic. It is also impressive that nearly 30 percent of organizations have healthy programmatic support of more than $50,000.

What is the annual budget for field services activities (excluding salaries)? This may include activities conducted outside of a dedicated field services program.

	Response Percent
$0-$5,000	**29.6%**
$5,001-$10,000	7.4%
$10,001-$25,000	18.5%
$25,001-$50,000	14.8%
Above $50,001	**29.6%**

Most field services units also have limited staffing. All but one respondent reported four or fewer staff members solely assigned to field services work. Nearly all respondents reported that additional staff members offer field services assistance in addition to other assigned duties. Respondents reported an average of five staff members providing this level of additional assistance.

Field Services Organizations Rely on a Variety of Funding Sources

Funding to support field services efforts comes from a variety of sources. While more than half of respondents reported state funding and nearly half used federal funding, additional endowment income, donations and earned revenue provided a significant amount of financial support. Most significantly, 53 percent of respondents utilized earned revenue to support field services activities, nearly matching the number of respondents receiving state government funding.

What are the sources of your funding (check all that apply)?

	Response Percent
State	**57.7%**
Federal	46.2%
Endowment	26.9%
Donations	46.2%
Earned revenue	53.8%

A majority of field services units–64 percent–charge fees to clients. For 28 percent of respondents these fees help underwrite the costs of providing services.

Does your organization assess fees for the services it provides?

	Response Percent
No fees	**36.0%**
Minimal fees (To cover food, fuel, etc.)	**36.0%**
Larger fees to underwrite the cost of the services (Consultation fees, research fees, travel/lodging, etc.)	28.0%

Field Services Offices Provide Critical Professional Services

Workshops, referrals and networking, site visits, and professional consultation are the most common services offered by field services units. All but one respondent offered training workshops and seminars to other organizations. More than half of respondents offered grants to their constituents.

What professional assistance do you offer? (Check all that apply.)

	Response Percent
Site visits (collections assessments, facility assessments, etc.)	77.8%
Professional consultation (advice on new startups, board retreats, etc.)	74.1%
Professional certification	7.4%
Grants	55.6%
Conservation assistance	40.7%
Lending library/sample documents	48.1%
Publications/technical leaflets/online resources	70.4%
Workshops/seminars	**96.3%**
Traveling exhibitions	40.7%
Disaster response/planning	63.0%
Networking and capacity assistance (growing client capabilities in any way)	77.8%
Referral assistance (redirecting a contact to someone else who can help)	92.6%
Professional/annual meetings	48.1%

The Need for Field Services Assistance by Cultural Organizations Is Great

In addition to offering a wide variety of programs, field services units handle a significant volume of requests. More than a quarter of respondents reported more than 1,000 contacts in 2010.

How many requests for assistance did you fulfill in the past year? Please provide a raw count of all requests, whether received or resolved by telephone, e-mail, or site visit.

	Response Percent
0-300	**57.7%**
301-700	11.5%
701-1,000	3.8%
1,001-3,000	19.2%
3,001-5,000	3.8%
More than 5,000	3.8%

History Organizations Are the Primary Service Area for FSA Members, but the Client Base Is Diverse.

More than 80 percent of responding field services programs served history museums and historic houses and sites. For 30 percent of respondents, history museums accounted for 50 percent or more of the organizations served. Field services units serve all types of institutions with interests in historic programming, including archives, libraries, and genealogical societies. Most respondents' clients are not limited to history organizations. More than 63 percent reported that they serve other types of museums. Clients perform a wide variety of functions, but most have some sort of museum function, hold public programs, and almost all hold collections.

How would you characterize the types of organizations you serve? Please estimate the percentage of your total contacts in each category.

	Response Percent
History museums	86.4%
Historic houses/sites	**90.9%**
Historical societies	81.8%
Archives	77.3%
Libraries	72.7%
Genealogical societies	54.5%
Historic preservation groups	59.1%
Community centers/groups	59.1%
Other types of museums (general, art, science, natural history)	63.6%
Other types of clients (please describe)	40.9%

Collections Concerns Dominate Requests for Assistance, but Field Services Operations Address a Range of Questions.

Collections-related issues are the dominant technical area of interest for field services clients. A whopping 94 percent of respondents reported receiving inquiries about collections care. And, just over a quarter of respondents noted that 50 percent or more of their information requests pertained to collections care issues. Conservation and collections policy questions were asked of 78 percent of respondents. Requests for information concerning grants were reported by 83 percent of respondents. Other categories for information requests received by a majority of survey respondents were governance and policy, board recruitment, board responsibilities, education, exhibitions and interpretation, historic preservation, facility improvements and repairs, starting a new organization, strategic and long-range planning, disaster planning and recovery, and fundraising. Field services organizations are always prepared to handle a wide variety of professional topics.

Field Services Clients Are Primarily Small, Nonprofit Organizations with Limited Resources

As expected, the vast majority of field services contacts are with small- to medium-sized nonprofit organizations with limited human and financial resources. For all but a handful of respondents, 70 percent or more of their clients were nonprofits. But, field services offices do not restrict their services to nonprofit constituents. Respondents also served small numbers of for-profit organizations, government offices, informal groups, and individuals.

Most clients served by field services organizations have annual budgets of less than $250,000. Just over 40 percent of respondents reported that 70 percent or more of their clients had annual budgets under $50,000. And, interestingly, four respondents had 75 percent or more of their clients from organizations with budgets of less than $10,000.

Because of these limited budgets, field services clients generally have five or fewer paid staff members and many client organizations are fully operated by volunteers. Of the 18 field services units that reported on all-volunteer staffing, half reported that 50 percent or more of their contacts are with all-volunteer organizations. Again, the field services client universe is as complex as field services units themselves. Field services assistance is not needs-based and field services providers are committed to serving organizations of all sizes, but the survey reveals that small- to medium-sized history organizations clearly look to field services offices for significant assistance.

Measuring the Ripple Effect: Evaluating Your Work

In addition to providing general information about the overall need for field services work, the real key to making a case for field services at the state level is evaluating and collecting data on a field services program's interactions with local organizations. Through direct technical assistance, grant awards, workshops, or consultations by telephone, field services programs quickly amass a high number of contacts with organizations around their states. Collecting data about these interactions and evaluating the effectiveness of services will prove that field services programs not only improve professional standards within their states, but also are one of the most effective outreach components of their parent organizations.

Field services activities improve the ability of small cultural organizations to serve their communities. This ensures the interpretation and protection of local collections, expands the educational reach of small organizations, and contributes to the quality of life in surrounding communities. It is this ripple effect that speaks to the true impact of field services work at the local level. It is also the most difficult element to quantify.

Tips for collecting information from clients:

- **Follow-up fast**: Develop methods for quickly following-up with contacts, within a day or two of a telephone conversation, field visit, or workshop. A quick e-mail after a telephone call can help a contact feel more at ease about offering feedback. Or, a note card mailed the day after a consultation can further your relationship with a local organization.
- **Establish a feedback file—for good and bad:** Make a point of holding on to all feedback received from your constituents, regardless of the tone. When reporting on outreach opportunities, solid written anecdotal information from your constituents can be just as powerful as raw statistical data. And, never be afraid to use the material collected to your advantage.
- **Develop formal evaluation tools**: Feedback forms are a standard practice for workshops and grant awardees are almost always required to submit a closeout report. Consider developing formal tools for all of the different types of interactions you have with your constituents.
- **Develop a plan for follow-up**: Consider a three- or six-month follow-up survey with a client to see how your assistance was utilized.
- **Encourage your clients to help you highlight the "ripple effect"**: Provide space on evaluation forms for written comments and feedback on the quality of services provided. Ask how field services assistance changed the client or improved its professional practices. Ask clients to send you press clippings and photos demonstrating how your field services contact assisted the client in exhibitions, programming and other local activities.

Build an Annual Report

Most institutions with field services units likely already create some form of annual report for their boards and friends organizations. Develop your own annual field activity review to provide a document that your institution's director can use to trumpet the successes of your field services program.

Tips for generating an annual report:

- Build a foundation by talking about the many services your organization provides.
- Use statistics to demonstrate the number of contacts made within your service area, the types of services provided to clients, and, most importantly, be sure to show the geographic distribution of your clients and contacts. Statistics obviously do not always tell the story of the depth of assistance provided by field services offices, so be certain to balance your data with reports on the accomplishments of your constituents.
- Describe the types of organizations you work with and discuss their needs, using your statistics of the types of services provided to clients as base data.
- Then, use your feedback file to personalize the report. Highlight feedback and anecdotes provided by clients in your report. Use photographs and press clippings to demonstrate the impact of field services at the local level.

Extending the Ripple Effect

Assembling and presenting this data can be time-consuming for field services units already constrained by reduced staffing and budgets, but having hard data establishes the undeniable value of field services. Despite their reach, field services programs are often considered for budget cuts or elimination. Solid information pertaining to the impact of these services can provide significant protection.

But, you should not be forced to make the case on your own. Local support can be of even greater importance in sustaining field services activities. Your clients know you best and appreciate the fact that they can enjoy a strong relationship with your larger institution through your field services work. Field services agencies have deep roots in local communities. Allow your clients to share their needs and their enthusiasm for your work with appropriate officials.

Tips for building on the ripple effect:

- Work with your institution's development and public relations offices to determine the best methods to generate grassroots support for field services
- For field services offices housed in government agencies, be certain that no field service workers engage in lobbying for the program.
- Work with other statewide organizations to leverage support for one another. During a tough budget negotiation, your state museum association or federation of historical societies may be able to mobilize members to lobby for support of field services activities.
- Ultimately, field services providers will find that clients are often their greatest supporters. They can speak to how they used field services assistance to improve their own institutions and communities. Do not be afraid to let them speak for you. They may also enjoy close relationships with their local representatives.

How to Conduct a Site Visit
By Andy Verhoff

There is no "right" way to conduct or prepare for a site visit. This section provides suggestions and is meant to serve as a guide to help field services programs develop a system that works for that program and the organizations it serves.

Pre-Visit Preparation

Attitude

- There are no "history police." Other than the public trust requirements of section 501(c)3 requirements, guidelines of state agencies that incorporate not-for-profits, and grant and other funders' requirements, we cannot force organizations to change. Therefore, our effectiveness is determined largely by our power to persuade and provide funds.
- A site visit is a conversation, not a lecture. The client learns from you and you learn from the client.
- Avoid making generalizations and assumptions about the organization before the visit.
- Consider developing a pre-site visit questionnaire for the organization to complete in advance of the visit. Some field services offices prefer a pre-visit form and some do not. It is up to the individual office to decide.

Contact with Museum Prior to Visit

Below are some questions to ask and ideas to keep in mind during your pre-site visit exchanges. This list is not an exhaustive list. It is meant to help you start thinking about how to structure your visit, relevant questions to ask, and to help you begin. While e-mail is a great way to communicate with clients it is important to have at least one telephone conversation prior to the site visit to establish a personal connection.

- **How do you want me to help you?** It is important to ask the client this question. Many times, what the client thinks they need and what they actually need are two different things. It is your job to answer their questions while at the same time steering them in the direction of doing what they actually need to do.

- **Learn to read between the lines**. Identify and list the explicit and implicit reasons the client is calling. This also helps you think of a few ground rules for the visit (see below for explanation of ground rules).

- **Clarify the client's expectations.** Explain whether and how you, the consultant, can meet those expectations

- A successful site visit motivates the client to act in the days and months following the consultant's visit. And, act in a way that allows the leaders of an organization to make decisions, resolve or successfully manage its issues, and be better (and know and celebrate that they are getting better).

- Note the limitations of bringing in an outside expert (you). Use the consultation to help them begin to set realistic expectations. Your job is not to give them fish; it is to give clients fishing poles and teach clients how to use them, and see the value in using them. (See Issues below - "I'm only here for the day")

- A site visit will address limited aspects of the client's operation—not everything! It can be useful to ask the organization to identify one primary and two secondary topics to assess during the visit. Address the items the client knows they want to address and the items you observe that they need to address. You may observe many items! You know, however, that you have limited time and so does the client. Prioritize the needs of the client organization by comparing its capacity at the time of the site visit against StEPs standards. What does the client want to do right, right now? What can it do right, right now? What does the client need to do right now? It's great when the answers to these three questions are similar.

- **Get the street address and directions to the site.**

  - Specific map directions aren't always necessary—just enter the street address into Mapquest or Google Maps.

  - Ask if there are any street detours you should know about and do ask for clarification on exactly where you'll meet—what building or room, what door you should enter, etc.

  - Get the home and/or cell phone numbers of your contact, in case you run into unexpected delays on the way. Make sure you also have the phone number of the site.

  - Make sure you know how many people you are meeting, who they are, and their role with the organization.

Planning the Consultation

1. **Explain to the client what "tool" the organization gets as a result of the site visit**. This "tool" is usually some kind of written report supplemented heavily by technical leaflets and reference to professional standards. The StEPs standards work very well for this type of consultation but MAP and AAM accreditation standards will also work. Your report should be about the clients' needs, should be in the form of a list of numbered priorities, and should be

short—not more than five pages. Clients' needs mean the priorities that they set as well as the needs you observe through all interactions with the organization.

The report is not a restatement of the contents of technical leaflets. What applies to good websites applies to consultants' reports, too: "Do what you do best and link to the rest." Part of your value lies in picking the best technical leaflets for the organization you are assisting. It takes time and hard work to successfully operate an historical organization. Pick easy-to-digest technical resources—failing to do so means they will collect dust on someone else's shelf instead of yours. (See Issues below—"Don't overload")

2. **Outline a sample agenda for the day**. This lets the organization know what to expect. Agree on arrival, start, and end times. Start and end on time. The sample agenda below reflects a full day visit. A half-day visit is also acceptable.

Sample agenda

9:50 am	Arrival
10:00	Introductions
10:15	Initial Q &A
11:00	Tour of entire site–exhibit areas, collections storage and workrooms, offices, mechanical rooms, facilities for the comfort of the public (including bathrooms)—everything. Note that some areas will receive more attention than others and some of that attention paid by the client and some by you. Some of the questions raised in the initial Q & A are better answered while on tour. The tour may bring up new questions—you and the client should be open to these opportunities.
Noon	Lunch
12:45	Continuation of tour
2:00	Consultant's observations and preliminary recommendations
2:30	Q & A and wrap up
3:30	Adjourn
3:40	Consultant in car, heading back to HQ

Times may vary for each site visit. Take travel distances into consideration and determine if you will need to plan an overnight stay. Remember to be kind to yourself and avoid marathon days. Give yourself the chance for a good night's sleep the night before a consultation.

3. **Identify who from the site should be present for the site visit**.

- It is necessary to have decision makers present during the site visit. This includes paid staff, volunteers filling the role of paid staff, and board officers.

The suggestions you make during the site visit and in the written report often require a change in current operations. The organization as a whole must adopt these changes. The best way to ensure this is to have organizational leaders present during the site visit.

- Limit the number of people from the organization attending the site visit. Between five and nine people is a manageable number. It is likely that some can't stay for the entire consultation, which is acceptable. All are welcome for as long as they can stay. Hopefully, most people can attend the introductions and initial Q&A in the morning, and/or the consultant's summary of need and Q&A/wrap up in the afternoon. It is also likely that a core group of 3-5 people will be with you for the entire consultation.

- Ask the client in advance to delegate someone from the group to take notes for the organization. You as the service provider will also take notes. However, your notes have a different focus and need to guide you in preparing the written report. If possible, send two consultants per site visit. If you, for example, are particularly knowledgeable about collections care, take the lead during that part of the discussion and your colleague can take notes. If your colleague in strong in board management, they can take the lead and you take the notes. In any case, the client should also have someone taking notes for them. In addition to ensuring that the client has a record of the proceedings, this is also another way to engage an additional person from the client organization in the consultation.

4. **Identify materials that the organization must send you in advance so you can prepare for the visit**. These materials should be forwarded two or more weeks prior to your visit to give you time to review. These materials can include:

    - Articles of incorporation*
    - Constitutions, bylaws, and standing rules*
    - Current budget and financial statements*
    - Code of ethics*
    - Collections management policy and forms (if responsible for a collection)*
    - Brief descriptions of public and educational programs. This should include the intended audience for each program, projected participation, and the actual number of people who attended
    - Promotional materials. These include but are not limited to: brochures, recent newsletters, website address, social media sites, sample news releases, and anything the organization publicly distributes. Ideally these examples answer the question: "how do you let the world know you're out there, what you do, and why anyone should care?"
    - Board member orientation materials
    - Any other materials the client thinks are important and help educate you about the organization

- If these materials are NOT available (particularly those noted with a *), it should be noted on the report. Because of the importance of these items (budget, code of ethics, collections policies, etc.), getting your client started on creating these policies and procedures can be a good first step in helping them meet national standards. The AASLH StEPs program can be very helpful to field services personnel in determining what a client needs. Since the StEPs program outlines the standard policies and procedures that the client should have in place, StEPs can provide you with an easy checklist to determine a client's immediate needs.

Remind the client that these materials are kept confidential and are needed so that you can assist them.

5. **You should provide the client with materials that address their areas of concern**. For example, if the organization wants to start a community archives, provide them with the best, concise materials available. Your visit will illustrate if they are ready to proceed with this project or if they need to address other priorities. Remember to provide the client with a suitable amount of materials and be responsive to their stated needs.

6. **You can use the American Association for State and Local History's Standards and Excellence Program for History Organizations** (StEPs) or other professional standards to construct the final report. StEPs is a very useful and user friendly program. Sharing information about StEPs, as appropriate, demonstrates the importance of following nationally accepted standards.

Day of the site visit

1. **Arrival**
   Arriving early (ten or fifteen minutes) prior to the start of the meeting allows time for looking at the exterior of the building, the surrounding area, and even a quick drive around the town. This additional time also allows for introductions and brief informal conversation before everyone from the client organization is present and the official visit begins.

2. **Engaging everyone at the meeting**

   It's important to get everyone present to contribute to the conversation. This builds rapport and lets everyone know that the site visit is a time to express visions and concerns and to ask questions.

   The site visit is a useful tool and can be an opportunity for a direct conversation about organizational operations and issues. However, each organization is different, and knowing how far to go with your comments and suggestions is something you judge during the visit. It is important to gather as much tangible and intangible information as you can, including the interactions of those present. Being observant and aware of personal relationships and interactions is useful in developing workable and professional solutions for the organization.

a. **Introduce yourself**. One of your jobs as the consultant is to initiate breaking the ice. It is important to be professional but not formal. Start the process by introducing yourself:

- Your name
- Your title
- Your organization
- Why you are here today? (The circumstances that caused your visit and this consultation?)
- Be thorough but do not exceed five minutes

b. Set a few ground rules

- Arrange chairs in the room so participants are facing each other.
- What happens during a consultation is kept private between the consultant and the organization.
- Everybody has the opportunity to talk. Make sure no one dominates the conversation or site visit as a whole.
- Keep the visit professional. Make sure everyone knows that personal attacks are not welcome. Maintain a positive attitude and atmosphere.
- Other or different ground rules may apply at different organizations, as determined by your initial phone contact or quick assessment when you arrive on site.

c. Outline the day's schedule

- Allow time for digressions and Q&A throughout the day
- Be flexible and allow the day to unfold. The important thing is to address the main issues identified by the client. Sticking to the precise schedule is not important.
- Realistically, a good site visit time frame is four to five hours. After this fatigue sets in and the visit ceases to be productive.
- Summary of a sample schedule:

- Introductions, breaking ice, and initial Q&A, 1 hour
- Tour of facility and rolling discussion of needs as identified during tour, 2 hours
- Lunch at a good local joint (or catered) during some good stopping point during the tour, 45 minutes to an hour
- Follow up discussion: consultant shares first impressions of needs and how organization should prioritize these needs and accomplish them. Follow up Q&A, to discuss issues that arose during visit, 1 hour. Tell them that the written report will be a more considered assessment of the organizations needs and priorities.
- Conclusion, 10-15 minutes

3. Start helping

a. **The Round Robin:** After introducing yourself, setting a few ground rules, and outlining the day's schedule, do the Round Robin.

- Ask each leader present to take turns sharing his/her name and title in the organization. After sharing name and title, ask everyone to answer one question about their organization. Make sure each person shares their name, title, and answer to the question before moving to the next person.

- Depending on the group dynamic, think about a "no repeat rule"—meaning a leader should think of a new answer to one of the questions below instead of saying "I think the same thing that others have mentioned." Some will say that anyway, but the idea is to get a new idea or concern out on the table. Both the "I think the same thing" and the new concern you ask them to raise are useful pieces of information to you, the consultant.

- Circulate a sign-in sheet requesting participants' NAME, E-MAIL, PHONE, and MAILING ADDRESS. Use the list to learn (and use) peoples' names during the consultation. With each person's permission, also add them to your office's e-mail list.

- Devise questions to get people talking. Below are some examples. The key is to have open-ended questions. Do not use questions with yes/no answers.

    - "How did you become involved with the historical society?"

    - "What keeps you coming back to volunteer?"

    - "If you had to save one thing in this building from a fire, what would it be?"

    - "If money were no object, what should this organization do?"

    - "How did you become interested in history?"

    - These questions should in some way get at the issues they want to address. For example, "If you had to save one thing in this building from a fire, what would it be?" is good if the organization has trouble agreeing what to collect.

- In the press of everyday business, leaders of historical organizations sometimes don't take the time to share the basic reasons they got excited about history and their organization in the first place. A consultancy is a chance for them to connect with each other, as well as with you and what you know.

b. Initial Q & A

- The leaders of the client organization called you because they have questions. Start the Q & A by answering some of their questions. Answer their questions to build rapport and get them talking.

- They should talk and you should listen as much as you talk and they listen. The open-ended questions give you information to get the group talking if they are resistant at first. Your goal is to get them talking without them noticing they are talking. You can counsel them and in language that's effective if they feel safe in asking questions and voicing concerns.

- Make it fun. Find the humor in a situation, when possible, and make sure you and organizational representatives have some fun.

- Differences of opinion will surface. The consultant's job, basically, is to keep difference of opinion centered on ideas and concerns and not people and personalities. As skillful leaders, consultants should focus on the behavior not the person. Your client-leaders have to get along after you leave. It's incumbent on the consultant to manage differences of opinion that will arise.

4. Tour of facility

- Keep the size of tour manageable. It is important to include the note-taker and ask that they continue to take notes during the tour. Draw everyone out, including the note-taker. It is important to continue the practice of engaging everyone so they are comfortable enough to share opinions throughout the day.

- Avoid taking a tour with just one person. You want to hear multiple opinions and you want multiple people hearing your observations.

- Include a rolling discussion of needs as identified during initial Q & A.

- Use teachable moments. Use the client's questions as a way to introduce things they need to know to do a better job of running their organization. Use questions as an opportunity to address certain issues.

- Clients want to use the tour to underscore points of pride and/or wells of shame. They also want to share their community's history.

    - One of your goals is to identify critical areas of operation that need immediate attention and other areas of concern. Keeping these problems in mind, connect the organization to resources (grants, assistance programs, consultants, etc.) that can provide assistance to address the needs you identify.

    - If you feel the tour focuses more on the history of the community rather than organizational operations, it is okay to redirect the conversation. You are there to consult on operational matters and only have a few hours to absorb a lot of information.

    - The client organization may see you as a link to grants or other state support. You can use the site visit to explain some of the grant programs your organization provides, if any.

5. Lunch

Use lunch conversation as an opportunity to identify their motivations for doing local history and what they think is neat about their community's history. Reference these observations throughout the rest of the visit.

6. Follow-up discussion of consultant's findings and Q&A

a. Identify the client's needs based on your observations and explain why these are areas the client must address. It is sometimes difficult to do this during the visit but, to the best or your ability, prioritize the needs you observe and provide a brief explanation.

- "On the spot" prioritization is challenging so it is important the client knows this is a provisional assessment. A written report will follow with more specific recommendations.

b. Considerations for priority setting:

- What must be done—the "no question, you, client, must do this and very soon" priorities (example: get those one-of-a kind tintypes of local Civil War soldiers out of the south-facing front window of the museum)?

- What can they do well and quickly to build momentum and a sense of accomplishment?

- What is necessary in the medium-to-long-term, but doesn't need to be accomplished right away?

7. Conclusion

a. Thank them for their time and hospitality.

b. Ask if there are any other questions.

c. Double check to make sure you can read the names, emails, addresses on your sign in sheet and if you can't, take this time to clarify that information.

d. Tell them when to expect your report. Give yourself plenty of time to write, but don't keep the client waiting for longer than a month.

e. Shake hands/acknowledge everyone present and thank them again for their hospitality.

Follow-up after site visit

1. Once you're out of town, find a place to pull over and make a few notes about the visit while it is still fresh in your mind. These notes will be invaluable when you compile your report.

2. Send a thank you note, for the opportunity to help, for a great lunch, etc. Keep a few note cards with you and write a thank you after you make notes.

3. Back in the office draft a brief three to five page written report, consisting of bulleted points. Use action verbs. Make every effort to send the report within approximately two weeks of the visit.

4. Follow up with a phone call or email approximately a month after mailing or e-mailing the report.

5. With their permission, put them on your email distribution list for notices about resources, workshop, grant opportunities, etc., that they can use.

6. Follow up periodically to build a relationship between your organization and theirs. If you see something somewhere that you think that organization would be interested in, send it. People like to know they are being thought of.

7. If appropriate, advocate for them. Send a letter to a local agency that has the power to help your client.

8. If appropriate, ask them to send your supervisor or board a letter about how your visit helped them. Ask them to advocate for the services your position provides.

Issues

The following are items that may come up during the visit

- **Getting past "show and tell"**

Sometimes clients want to use your visit as an opportunity to convince you that their history is great. You're the person from the state historical society or larger organization and the client wants to convince you that their community's past is historic and that they have important artifacts, with the implication that their stuff is the best (and it might be!). The client wants to give you a tour to show off its organization or sees your visit as a way to convince the state historical society to give the client a million dollars, etc. However, you need to remind the client that you are there to help them with a specific purpose

- **Be practical**

Everything at the organization might be wrong all at the same time, but the client can only fix one or two things at a time. Motivate the client to fix those things and celebrate that it fixed them as a way to motivate it to fix other things.

- **Who are their audiences?**

General public doesn't count—make the client be specific. Ask the client to describe who it wants to see using the organization: school-age children? If so, what grade? Parents with children? If so, what age range? Researchers? If so, what are they researching?

- **Encourage the client to think about what it's doing from a visitors or end-user perspective**.

Encourage the client to think about the effects of its actions or inaction fifty to one hundred years from now. Refer to the decisions people at the organization made fifty and one hundred years ago (or as far back as practicable) and identify the ramifications of those actions or inaction. Remind the client's leaders that they are making decisions for people many years into the future.

- **Dealing with conflicts**

Refer to accepted professional standards and be able to explain the reasons for these standards. StEPs is an excellent resource to use to identify standards and provide an affordable, easy to use way to begin meeting standards. Joining the StEPs program also gives them access to the StEPs online community, including its many resources and discussion boards. Also explain that there are other programs that provide assistance in meeting standards like the Museum Assessment Program (MAP).

Make sure that all the opposing parties are present at the assessment and again remind them this is not about personal agendas. This is about fulfilling their fiduciary responsibility to properly manage the organization. That includes providing proper care for the artifacts. It's the consultant's responsibility to say what's right and set the expectation that they should do it to the best of their ability and resources. Take the side of professional practice rather than any person or group affiliated with the organization.

- **Again, a good rule to follow is "do what you do best, link to the rest".**

    - Help the organization think in terms of who (people and organizations) can help do the things they need to do to fulfill their mission.
    - Do they collaborate with the local CVB?
    - What service organizations are in town they may be interested in partnering?
    - Are there any youth (teen-age) service groups (Eagle Scouts, Girl Scouts, school clubs, home school groups, etc.)?
    - Other groups or businesses that are potential partners (parks and recreation department)?

- **Final Tips**

    - End the visit with a positive and inspirational message.
    - Let them know you are always available by phone and e-mail.
    - Wrap up the day re-stating that they are responsible for the well-being of their organization, which they run in the public trust.
    - "I'm only here for the day—in the final accounting, you, leaders, are who will do the work and follow up on the recommendations of my report."

Case Studies and Examples
By Steven L. Stearns

The following are case studies that are grounded in real life experience. This section provides examples to use when consulting with clients. Each case study is followed by discussion questions. Tips follow the discussion questions and provide suggestions for how to avoid and deal with the scenario outlined in the case study.

Please note that these are the kinds of questions and issues that you should be discussing with the organization. Each organization will be different so specific questions and issues will be different. In addition, each Field Services office has a different personality so the exact conversations will vary. While no two organizations or Field Services offices are the same, these case studies and sample questions provide some examples of situations you may experience in the field.

Reporting Unethical, Illegal or Negligent Behavior of Board Members or Staff

Case Study

An upper Midwestern outdoor history museum, posited on sixty acres of state land and with a full-time staff of ten, recently hired a new director. The director was told he would need to work with three boards: Foundation, Corporation, and Volunteer Guild. While this was different from the two museums where the director had previously worked, he was confident that he could ensure a good relationship among the boards.

At the first meeting with the Foundation Board, the chairman politely told the director that the other boards had nothing to do with the financial administration of the museum. He (the director) would prepare a budget for the upcoming year and the Foundation Board would review it. The board would make changes as necessary and had line item veto authority. Once approved, the director would share the budget with staff and the other boards. While the director had latitude to create more detailed department budgets, and could seek advice from the Corporation Board in doing so, he could not deviate from the approved funding.

As the director worked on the budget for the next fiscal year, he sought input at staff meetings. He was surprised to learn that the staff basically took a "what's the point" attitude. According to the curator of collections, she had stopped trying to put together a department budget after a couple of tries. She remarked, "Jane has her pet projects and that is what will get funded." Jane Greene was the chairperson of the Foundation Board.

At the Corporation Board meetings, discussion of the budget usually evolved into a general bashing of the Foundation Board. Several Corporation Board members felt they were no more than babysitters when it came to running the museum and were only consulted when there was an operational crisis. Attempts at initiating strategic planning sessions with the Foundation Board led nowhere.

The Volunteer Guild worked with supplying and training all volunteers. It had a good relationship with the curator of interpretation and played a major role in planning for, and implementing, the annual craft fair.

The director promised his staff and the Corporation Board that he was going to make a good faith effort to incorporate some of their suggestions and needs into the budget. Prior to the November Foundation Board meeting, the director scheduled a meeting with Ms. Greene to go over it. After only five minutes into his presentation, Ms. Greene pulled out a folder and said, "There's no need to waste our time here. I have the budget I think fits the needs of the museum for the next year." She handed the director the folder and noted, "Look this over so you can present it to the board." Ms. Greene then left the room. Standing there speechless, the director proceeded to open the folder and was stunned to find a check on top made out to him for $500 from Ms. Greene's personal account.

Group Discussion Questions:

1. What is the relationship between the director and the Foundation Board?
2. What is the director empowered to do?
3. Can the director effectively manage the museum under the current board organization?
4. How should the director respond to Ms. Green's attempt to gain his cooperation?
5. Is it possible to overcome a strong board chairperson or member that persists in unethical behavior?

Tips:

- Directors should have a precise job description with board relationships spelled out.
- Museum boards should have a clear mission statement.
- There should be ethical standards in place for all employees and board members.
- All staff members and board members should sign the ethics policy before beginning their job or board term.
- The ethics policy should state what actions will be taken when unethical behavior is reported.

- The ethics policy should also address the consequences if staff or board members are of but do not report unethical behavior.

- Directors/managers/curators must determine what board assets are available to them as they attempt to impose their agenda and invoke change in their institutions.

To Start or Not Start a New Museum

Case Study

A riverfront museum in America's heartland took a big step toward reality recently during groundbreaking ceremonies next to a former Sears store. This occurred fifteen years after the city purchased the property and twelve years after initial discussions began. A major local company made a $52 million commitment to the museum, partially to fund a visitor's center and a parking garage.

The museum did not come without a lot of debate. It did not help that other initiatives aimed at bringing people to the region had come under scrutiny, particularly since they were eating up, not creating, revenue. Some did not feel the museum would qualify as a downtown amenity. For others, attracting people to the region had more to do with jobs, a better school system, a reduced crime rate and improved garbage pickup. Even the company making the substantial contribution was criticized. With unemployment at a high level, a few residents wondered why the company was not spending discretionary funds to bring back laid off workers.

To gain support for a referendum pumping $40 million in sales taxes into the project, museum officials alluded to an IMAX-brand theater that would open on the south end of the complex. As the date for the groundbreaking came closer, however, local officials raised concerns about the cost of an IMAX and how much control there would be over what was shown. Then, when it was announced there would be another IMAX on the north side of town, more than a few felt betrayed. The museum IMAX was tabled for further review.

Further unanswered questions revolved around the museum's endowment. Standing at three million dollars, the endowment was far short of the ten million needed. Museum officials were reasonably confident they could make up the shortfall through a combination of private fundraising and federally-supported new market tax credits.

In the end, supporters defined the argument in terms of those who had vision and those who did not. They encouraged debate on the details, but felt everyone should agree on the vision. For those politicians, museum supporters and company officials that persisted in moving the riverfront museum forward, the groundbreaking was a great day. For those who doubted its contribution to a revitalized downtown, who felt duped by a promised IMAX theater that was now in question, and who felt invested resources could be better used elsewhere, this was just another example of a project that would require continual taxpayer assistance .

Group Discussion Questions:

1. In the case of a new museum, at what point should vision trump practical concerns?

2. Does the presence of a major donor give cause to proceed with a museum?

3. How important a role should public input play in deciding to start a new museum?

4. If a museum project changes its persona before ground is broken, should it be postponed or cancelled?

5. Are there other alternatives to a new museum?

Tips:

- Building a museum must extend beyond the creation of the physical plant. After capital funds are raised, where will operational support come from? Where will operational support continue to come from in five, ten and even twenty years in the future?

- Museums will typically not generate enough income to sustain themselves. The best you can hope for is to break even.

- Accessibility, companion attractions and public enthusiasm are factors that must be given adequate attention, but are sometimes left out of the equation.

- Do not mistake vision for anything else but what it is; the fulfillment of someone's dream.

- Provide a list of alternate projects that will fulfill the needs of the community but have fewer demands than a museum. Some examples are; traveling exhibit, community programs, community event, partnership with local library for exhibit space, historic marker program, brochure, walking tour, iPhone application, website and the list continues.

- Provide a packet of information about starting a museum.

Expansion: At What Price?

Case Study

In 2002, a west coast history museum began to look for ways to better promote cultural and environmental heritage. A major concern of the board and museum director was that even though the museum was housed in a relatively new facility, its location was somewhat remote and there was a public perception of inaccessibility. As a result, the board considered steps to improve the public presence of the museum in the community, along with the museum's readiness to undertake a major capital campaign to support expansion.

Two focus groups with community representatives were established. They provided perspective on the museum and made recommendations for its improvement. One particular area of concern was the insufficient parking. Along with the new red brick structure built in 1999, the property included a small Victorian home used as a gift shop. It was connected to the main exhibit building by a covered walkway. Near the entrance of the museum was an historically-significant carriage house that was in need of rehabilitation. However, with the death of the house's last ancestral owner in 2003, there was no advocate for raising funds to bring it back to its former self.

In order to expand the parking lot to fifty vehicle stalls with sufficient room for buses, the focus group determined that the carriage house had to be torn down. An added argument was that a modest visitor's center could instead be constructed 500 feet further north. There was general agreement that a more attractive, accessible and expansive entrance to the museum would help immensely.

Support and enthusiasm for the focus group's recommendations elicited enough support to garner a contribution for the completion of preliminary architectural plans. In the months that followed, the director received board approval to conduct a strategic planning exercise. The planning exercise included several board members and two museum staff representatives, but not the Curator of Collections.

One year to the day of the initial focus group meeting, the Board voted to tear down the carriage house. They did not foresee that his would instigate the most serious crisis at the museum since a theft of several paintings in 1982. The Curator of Collections and two volunteers approached the local paper in a last-ditch effort to stave off the demolition. They accused the director of ignoring unpublished research on the carriage house and stifling internal debate on the subject of its future.

The director claimed there was nothing new in the research and that all relevant information regarding the carriage house's historical significance was made available to regulatory authorities who approved the project, including the State Historic Preservation Office. The Curator of Collections produced the will of Ebenezer Harris, the last heir, who set aside a small fund for the house's preservation. She claimed that the carriage house design was a reflection of the Harris family's aesthetic philosophy. And the Curator of Collections was supported by an art history professor at the local college. With support marshaled on both sides, the matter was referred to County Landmarks Commission for further study and review.

Group Discussion Questions:

1. Was the Curator of Collections correct in challenging the recommendations of the Board, particularly in view of the year-long vetting process?
2. When does the historic integrity of a building trump expansion efforts?
3. Could the process in looking to improve the museum have been done differently?
4. Could the carriage house have been incorporated into expansion/improvement plans?
5. In terms of a capital campaign, did the museum have its priorities straight?
6. What are some other options?

Tips:

- In considering expansion and/or physical plant improvement, it is crucial that staff and boards be on the same sheet of music if at all possible.
- Both capital and operational costs have to receive equal attention when considering museum growth.
- Bigger is not always better.
- Preservation of existent structures and landscape must be a consideration in any expansion plans.
- Historic buildings can be used as a visitor center. This at least saves the building. The former appearance and use of the building can be portrayed through exhibits or other interpretive methods.

Mediating in the Workplace

Case Study

An outdoor living history museum had been open for a year. Because the museum was adjacent to state forest land, it was several miles from the state historical society that managed the site. The director, curator of interpretation, operations manager, accountant, and one researcher lived near the museum, but the collections staff, two researchers, and the public relations team worked out of the society. Staff meetings were held every other week at the museum, while the director spent two days a week at the society.

The operations manager (OM) and research staff had had a rocky relationship ever since the OM had decided to stockpile an outbuilding he felt did not fit the master exhibit plan approved by the society. The OM's brother-in-law had completed the architectural plans for the museum and there was an underlying feeling that the OM held a special relationship with the director. The director did nothing to dispel that feeling since he and the OM had lunch alone every Friday.

Things blew up at a January staff meeting when the chief researcher demanded to know why the outbuilding was on hold. The director indicated that the delay was only temporary until a corroborating architectural survey was received. The OM noted that if the original research had been completed more carefully, the museum wouldn't have to recheck everything. Angry words evolved into a shouting match that ended with the researchers all storming out of the meeting.

The remaining staff all sat silent waiting for the director to say something. The silence was broken when the OM declared, "Dan, you have got to reel those prima donnas in. I'm tired of cleaning up after their mistakes." The director cleared his throat and announced the meeting was adjourned. That afternoon he drove to the society to meet with the Vice-President for historic sites.

The curator of interpretation and collections staff decided to go to lunch. They discussed the lingering feud between the OM and the research staff agreed to write a memo to the museum board requesting some time to privately address the situation. They all were in agreement that the director would need to leave the respective board meeting if their request was granted. Basically the memo was to be a vote of no confidence in the director.

Because the curator of collections was very respected within the society, their request was granted. At the February board meeting they were given fifteen minutes to share their concerns, but the director was allowed to stay in the meeting. In the days that had gone by since the volatile staff meeting, the director pretty much kept to himself. The next staff meeting had been cancelled because of bad weather. No one did anything to defuse the disagreement.

The curator of collections explained the dilemma as best she could. She noted there were days they did not know who was in charge, the operations manager or the director. Everyone had experienced at least once during the inaugural season the “veto power” of the OM. The curator of interpretation said he was especially concerned, because his recommendations for changes in the interpretation for the upcoming season had not been returned to him by the director. Time was running out for implementation. The director was asked to respond and he brushed the complaints aside, saying these were typical petty reactions to the creative process endemic to all new outdoor museums. He promised the curator of interpretation he would meet with him very soon and presented the board a new job description for the operations manager.

The board meeting ended with one member being asked to report back, following up on the staff concerns, at the March meeting.

Group Discussion Questions:

1. What could the director have done differently to mediate the disagreement between the operations manager and the research staff?

2. Was the research staff being thin-skinned or did the OM need reigning in?

3. Does geographical separation have an effect on museum staff relationships?

4. What can effectively run staff meetings do to enhance a positive working environment?

5. Was involvement of the Board in a personnel management problem appropriate use of their time and mandate?

Tips:

- Museum management cannot afford to give the impression of favoritism.

- Staff meetings need to be a place where differences of opinion can be voiced honestly and where consensus can be facilitated.

- There should be a clear understanding among museum staff on the process for resolving personnel concerns as stated in a museum staff manual.

- Areas of responsibility must be clearly defined for museum staff and job descriptions should be reviewed regularly in association with personnel reviews.

- Consider having conflict resolution training each year for staff.

Dealing with Perceived Neglect

Case Study

George and his wife, Helen, had been site managers at a small historic fur trading post along the Missouri River for eighteen years. In that time, they had presided over modest improvements and had seen the addition of a part-time collections assistant, a seasonal volunteer coordinator, and, most recently, an intern from the state university. Each year they prepared a budget for review by the Department of Natural Resources that oversaw all historic sites on department property. Normally it was returned with few deletions, but George had learned long ago to not ask for too much.

The trading post was open from May through September and relied heavily on spring and fall school tours for the bulk of its attendance. Marketing was largely handled by the department and George made sure he had the seasonal schedule in on time for inclusion in the current year's brochure. Helen handled the bulk of the request for speaking engagements, mostly within a 50-mile radius. Both George and Helen participated in the annual rendezvous at nearby Fort Stevens. They received no extra compensation for the latter contributions. It was understood it went with the job.

In 1998, George had pressed for a promotion to LS-3 which would have meant an increase in salary of $3,830 per year. He was told the historic sites program was a low priority within the department, but if he wanted, George and Helen could move into a cabin on department property. The department would make the necessary repairs to make it livable. They accepted.

The intern had been a mixed blessing. She was full of energy and had a lot of ideas. But she also asked a lot of questions about why the trading post did not receive greater support from the department. When she asked permission to visit department headquarters to learn more about historic site management, George was apprehensive. However, it was part of the agreement for her services.

That visit generated a phone call from Mr. Hopkins who last visited the trading post two years ago. He apologized for not having been down to see the site as DNR director of historic sites. Mr. Hopkins wanted to share a recently devised five-year plan for the department's site and told George he would be down on Tuesday. When the intern returned she asked George and Helen why they had not been attending the monthly sites meeting in Cottonwood City. George explained that he gave up going when no one ever acted on his suggestions. The intern came back with a sheaf full of grant applications and volunteered to begin filling them out. George told her to go for it if she wanted to. Now that he thought of it, maybe it was time for another state humanities grant.

The bottom line is that George had grown accustomed to his routine. He had grown tired of the bureaucracy. The fur trading post was the furthest historic site from department headquarters. Why keep making phone calls that were not returned? Monthly reports were filed and rarely acknowledged. So he stopped doing them five years ago. He and Helen had wanted to attend a certain regional museum meeting, but after being turned down three times to go, they stopped asking.

Yes, he would welcome Mr. Hopkins and take him to the local café for lunch. He would listen politely and expect nothing.

Group Discussion Questions:

1. Was George right to be reconciled to his situation as site manager and not rock the boat?

2. In an environment of limited resources, how much support can one expect and/or request from state and municipal agencies for historic sites/museums?

3. When support and communication is lacking from superiors, should involvement in community affairs be curtailed or limited?

4. How can historic site management maintain a positive persona when navigating government bureaucracy waters?

5. How critical is the injection of new personalities and ideas to the success of a historic site?

Tips

- Staying engaged within the respective government environment is critical for any historic site.

- In times of limited resources, it is even more important to think "out of the box

- Keeping a good attitude and professional bearing are sometimes the only weapons available to historic site personnel.

- Do not confuse inattention with lack of concern.

- There is never a good reason to purposely skip meetings that are a part of your job.

Making a Case for Partnering

Case Study:

In the early 1990s, a municipal historical society in California's valley country was struggling to maintain an estate and ranch left to them when the last surviving heir passed away. At first the society was thrilled to have such a prominent agricultural heritage site. It moved its headquarters into the Servants Quarters and began the work of restoring the Carson Superintendent's Lodge to reflect its role and condition in the early twentieth century. There was a tremendous effort made at gathering original artifacts. It took almost ten years, but eventually more than seventy percent of the original furnishings had been tracked down.

Still, even with the assistance of generous local donors and the endowment that came with the estate, the society had to admit it was over its head. There were still several buildings to restore in addition to infrastructure needs such as temperature control systems. So, at a fall board meeting, the society's president presented for approval a plan to partner with the County. Seven out of the ten board members agreed that any loss of autonomy in managing the estate and ranch would more than be compensated for with the additional financial assistance and professional guidance.

The three remaining members felt that such an arrangement would not be in keeping with the spirit of the original gift. The county had been gently pressuring the society for a few years to make more of the estate accessible to the public. In those member's eyes any partnering would just play into the county's hands to make the estate/ranch a part of the adjacent public park. One member referred to the county executive as a snake in sheep's clothing. He remarked, "If this society signs any agreement whatsoever with the county, I am off this board." That raised a few eyebrows as it was understood a sizable annual contribution went with his resignation.

The president went on to note that working with the county would open the door for state preservation grants and the potential to benefit from the Community Block Grant program. He cited the need for new roofs on the Superintendent's Lodge, the Servant's Quarters and the Ice House. The president reminded the board of its desire to refurbish the Carriage House and use it for a multi-purpose educational center.

In addition, the president reported on the state of the capitol drive. Only one-third of the goal of $3.2 million dollars had been raised. By now, it had been hoped that more than half of the money would have been raised. A board member who specialized in not taking sides in any argument suggested that they table the president's plan until the next spring. Another board member said maybe it was time to recognize that the society would not ever get its hand around caring for the property. As far he was concerned give the entire bloody site to the county or whoever else would take it.

The president then called for a fifteen minute recess. When the board reconvened, he asked for a society employee to address the board. Ms. Glidden, Curator of Artifacts and

Antiquities, explained her plan in detail for restoring the Lodge's interior, to include replicating three wallpapers and conserving original ones, restoring all painted surfaces to their original finishes, as well as replicating the main carpet, the entry hall's grape cluster chandelier globes and the Jacobean Quatrefoil anaglyptic ceiling. She explained how her vision was to accomplish a first-class restoration of the Lodge which would allow the society to hold a grand reopening. This Ms. Glidden hoped would greatly aid in accelerating the fundraising efforts. Sadly, she said, this could not be done without partnering with an outside agency.

The president called for a vote and his recommendation to partner with the county passed six-four. By the end of the day, three board resignations were on his desk.

Group Discussion Questions:

1. Did the society president make a strong enough case for partnering with the County?
2. Was the board member who suggested tabling the director's plan for reconsideration offering a sensible alternative?
3. What other avenues did the society have to deal with its predicament?
4. Was partnering with the County worth losing three board members?
5. How important is staff support before considering any partnering efforts?

Tips:

- Before partnering with private and/or public entities, ensure there is buy in from board members and staff.
- Partnering is especially helpful when considering grant applications.
- Partner with those institutions that have similar goals and where there is clear mutual benefit.
- Partnering will not solve all of a museum's problems, but does provide options not available with limited staff.

The Path to Accreditation

Case Study

Chester Conard had moved from his beloved northeast to take a director's position at a southern museum largely because he liked the opportunity of taking a respectable museum to the next level. He knew that there would be challenges, but the board that hired him had promised their support to eliminate deficiencies that were obstacles to accreditation. Even though the regional history museum operated with less than fifteen employed staff, he knew that 48% of American Association of Museums (AAM) accredited museums were in the same boat.

Initially, the board expressed some reservations about the real possibility for accreditation. However, Chester had emphasized that accreditation would bring institutional credibility, aiding any fundraising efforts. Also, he noted it would strengthen management as the process would require a complete review of policies and procedures. The process would clarify staff, board, volunteer and collaborator relationships. That seemed to hit a positive note with the board. Finally, Chester pointed out the positive effect on operations as the accreditation process mandated a complete review of facilities. The staff liked that aspect.

At one of his first staff meetings, concerns were expressed as to whether the museum was really ready for accreditation. The business manager reported that it had taken him more than a year to straighten out the bookkeeping mess he had inherited. Even now, he was having trouble getting approval for new accounting software within the budget. The education director questioned whether accreditation could be achieved with primarily part-time employees. She had one assistant, but most of her staff were seasonal volunteers or in a half-time status. Finally, the curator of collections noted that half of the museum's artifacts were stored in rooms without climate control. Plus, she did not know the provenance of one-third of the accessions.

Chester indicated he would first file a pre-application with AAM to gauge the museum's readiness. If the staff's doubts were vindicated, they would step back and rectify deficiencies before embarking on the accreditation process. He reminded them that the road to accreditation was a long one and would likely not be accomplished in less than three years. Even when an institution reached the year-long Accreditation Self-Study phase, all preparatory work had to be accomplished within a year. So there would be time to work on internal concerns.

Fortunately, the board chairman had personally donated the four hundred dollars for the non-refundable fee required by AAM to process the pre-application. Chester only had two months to meet the mid-June deadline, but he was determined to get things moving. He told his secretary to clear all but the most essential meetings off of his calendar.

There was just one further obstacle—Mrs. Cumberland. The oldest of the board members and well-placed within the community, Mrs. Cumberland felt all of this talk about accreditation was a distraction from the main goal of the museum; the launching of a new capital campaign. She had great plans for the new director, including a summer full of speaking and social engagements. When Chester arrived at the April board meeting, he was surprised to learn that the accreditation effort was one of the first things on the agenda. The board chairman advised Chester that the general consensus was that seeking accreditation was still a good thing, but he asked if Chester could delay his initiation of the pre-application until the next year. He then introduced Mrs. Cumberland, who enthusiastically laid out the plans for the capital campaign. To say that Chester was deflated was an understatement. He barely could concentrate on the rest of the meeting as he tried to figure out how he could get the accreditation effort back on track.

Group Discussion Questions:

1. Is accreditation, a time consuming effort, really worth it?
2. With only one-fourth of history museums accredited, was Chester putting too much priority on accreditation?
3. Does a small museum staff have the resources to participate in, and complete the accreditation process?
4. Should accreditation be bored-driven?
5. How hard should Chester push back in his effort to get the accreditation process going at his museum?

Tips:

- The accreditation process has value within itself.
- AAM accreditation is not the only accreditation available to museums.
- The AASLH StEPS program is an excellent precursor to the pursuit of accreditation.
- Assessment of commitment by staff and boards should precede any attempts at accreditation.

Hiring at Historic Sites: Seasonal Choreography

Case Study

Janielle did not look forward to this time of year. To staff the historic farmstead with its farmhouse and seven outbuildings required sixty-two seasonal employees. Most worked two to three days a week, but there was a lead interpreter for each building who worked 32 hours a week. They were paid $ 7.60 an hour to start. Volunteers were used for special events. Having all positions filled by May 10 when the farmstead opened for school tours was more than a challenge.

The past five seasons Janielle had posted her usual ad in the county papers. The nearest town of any size was Tawilla, twelve miles away. So, the entire county was her recruiting base. The last dozen or so employees she hired had been marginal at best. But what was she to do? The director's empathy only went so far. He was always chastising her hiring "unqualified" interpreters. This season she had called on a friend who managed a mining museum one state over to share hiring strategies.

Sandy asked to see Janielle's employment plan and she was embarrassed to admit she had none. A good employment plan, she learned, would help her hire the right people for the right job at the right time. Such a plan would have several components to include ethics, cultural responsibility/sensitivity, communication, expectations, a safe work environment, the source of the labor pool, hiring procedures, orientation, and disciplinary procedures. That was fine, Janielle said, but she had to hire her interpretive crew in less than two months.

Sandy asked Janielle if she had stayed in contact with the employees from last year. She responded that some stopped in from time to time and phone calls from the "regulars" would come in March. It was understood that staff training began in mid-April. Janielle agreed that she could do a better job of encouraging cohesiveness among the group. Had Janielle enlisted any of her seasonal employees in the recruitment process? Not really, she replied. June Hayward was a real go getter and always brought a couple of new people in for interviews on her own. Janielle made a note to bring in her Lead Interpreters for coffee and tea one afternoon soon.

In addition, Sandy asked Janielle why she had so many two to three day a week employees. Janielle replied that they were easier to recruit. People liked to spend time with families during the summer, you know. Sandy emphasized that having fewer numbers of people working for longer periods of time should always be a human resource goal. Had she thought about establishing an internship program with Harrison College? The college required an eight week public history internship as part of their history degree (option C). Janielle was taking a lot of notes.

Sandy questioned Janielle on other aspects of her seasonal labor force such as did she know who she was competing with? Were there any partnering possibilities? Was the farmstead's wage structure competitive with area businesses, particularly non-profit organizations? It was beginning to be obvious to Janielle that she would need a recruitment and hiring plan as well as an employment plan. She wondered why the director had not encouraged that.

The next day Janielle met with the business manager who encouraged her to proceed with Sandy's suggestions. However, he cautioned her not to get too optimistic. The cannery was expanding its operations this summer and competition for employees would be fierce. Plus they paid $10.20 an hour to start.

Group Discussion Questions:

1. Can historic sites benefit from having an employment, recruitment, and hiring plans?
2. Does the staff of a small museum really have time for such detailed personnel management tools?
3. What can an education director do when the wages the institution can offer are below average for the surrounding labor market?
4. How do limitations such as a maximum of thirty-two hours per employee affect seasonal hiring?
5. What can be done to ensure a quality interpretive program when marginally qualified employees have to be hired to complete a seasonal work force?

Tips:

- Ensure you are looking for seasonal staff in the right places.
- Do not ignore establishing relationships with colleges as a source for seasonal employees.
- With desired skills in mind, determine if you can promote from within for any supervisory positions.
- Look at what can be offered for seasonal employees that compensate for lower wages (training, period clothing, social events, status, e.g.)

Expanding Membership to New and Younger Individuals

Case Study

The Fairchild County Cultural Consortium received a disturbing report from the consulting firm they hired to break down membership demographics for each of its institutions. The average age of museum members was going up. It currently stood at forty-nine. In the case of the historical society, it was fifty-two. There was a general consensus that unless member recruitment included younger individuals, the county's cultural offerings would die on the vine.

Of course, museum memberships were the first to suffer when jobs were lost and budgets cut. That did not help. The consulting firm suggested that they bring to the next meeting the membership director of an up-and-coming museum. All agreed it was time for some new ideas.

At the next meeting, Ms. Jennifer Schmidt from the Benjamin Custer Historical House & Arboretum presented her plan for increasing memberships and the progress made to date. Ms. Schmidt discovered that free admission for those holding a basic membership and providing greater access to those enrolled at high levels were most attractive to members. Therefore, they expanded savings on admission to guests of members and provided more events with better access. The site also began promoting neighborhood establishments, including discounts at new restaurants and local boutiques.

In addition, Ms. Schmidt reported that they were forced to reduce expenses, so they eliminated most of their paper material and, in turn, reduced postage and mailing costs. There was increased emphasis on communicating via e-mail. She summarized that it was all about maintaining or increasing quality while reducing expenses.

Of course, the Consortium was interested if the historical house had actually seen an increase in memberships and in what categories. It had, going from 172 to 348 memberships in three months. The question was asked about the impact on the site's staff. There was an initial demand on hours and contributions, but Ms. Schmidt said that once they were over the hump everyone was quite pleased with the results. And, germane to the county's concern, there had been an increase in family memberships.

Because of the initial success, Ms. Schmidt indicated they were going to launch a Young Friends group for members in their 20s, 30s and 40s. The program was to aim at raising awareness of the historic site among the region's young professionals and hopefully attract and retain new/younger museum members.

From the meeting there arose several questions. Some noted that not everyone had a computer. Others enjoyed getting their quarterly magazine and did not want to see it converted to electrons. Still others said they had insufficient staff to carry out something so ambitious. The chair admonished everyone that like it or not, real change had to occur.

Group Discussion Questions:

1. Was the Benjamin Custer site's success an aberration or something achievable by any historic site?

2. How can new and younger members be recruited when the bulk of the institution's members are so old?

3. Do sites with small staffs have much hope to effect changes in membership numbers and composition?

4. Is a working website critical to the success of any membership plan?

5. Would there be any value in matching demographic lifestyle with a museum's mission?

Tips:

- Engage your front line staff in membership sales.

- Conduct a survey to gage member interest in going to all e-mail correspondence. Resist the urge to guess what your membership wants.

- Mail is still a viable and important source for new members.

- Review your membership structure and see if any changes are warranted.

- Remember that members have to see real value in an institution's programs.

Small History Museum Offered Large Gift

Case Study

The town historical society is an all-volunteer organization. It is well run, open regularly, and fiscally stable—all of the things you want from a strong historical society. They run a museum and were just offered several rooms of taxidermy African animals shot by a former community member. The donor also offered to build an addition to the museum to house his collection.

The leadership of the organization is split on whether to accept the gift of the taxidermy and building addition or not. Some leaders think it is outside the mission of the organization. Others think that since the donor is a former community member, it is within their scope. Some people dislike the idea of dead things in the museum. Others don't want to offend a rich potential supporter and would accept the gifts under any circumstances.

They call you for advice….

Group Discussion Questions:

1. Exactly what is the mission of this group? Do they have a collections policy? Who decides what gets accepted? Does the offer to build an addition make a difference in accepting this collection?
2. If the donor was a writer and offered a book he had written about African animals, would your answer be different? What if he offered a collection of photos he took in Africa? What if the animals were local natural history specimens? Where is the line you suggest they draw in the sand?
3. If they accept this gift, can they reasonably sustain the collection and the building?

Tips:

- Deciding if accepting this gift is appropriate under the organization's mission statement and collections policy is paramount. If the organization does not have these documents in place, the offer of this gift will color all the conversations. Even with a clear policy, the pressure to accept a gift this large and unique will be tempting, even if it is not within the mission and scope of purpose.
- The idea of "mission creep" to take on a large project to satisfy a donor is temping. Many groups "chase" money and let their mission wander as grants or other funding become available. Letting your mission stray can potentially mislead your community about what you do and lessen your perceived value as a community asset.
- The volunteer nature of this group does not change the underlying principles involved in making this decision. Having a mission statement and collections policy

are basic to every collecting organization, whether they have a volunteer staff or a paid staff. Being an all-volunteer does not necessarily imply unprofessional behavior or standards. The sophistication of any particular group (whether all-volunteer or not) implies that where you begin in your conversation about the issues and the use of jargon laden language (museum specialized terms, for instance) might be different, but the core principles of the conversations will remain the same.

Board President Becomes First Museum Director

Case Study

Carl Andersen was a great board president for the county historical society. In addition to leading the board meetings, he did most of the publicity, created exhibits, and headed the fund raising efforts that allowed the museum to grow. As a part of that growth, the museum hired their first executive director.

When the board decided the time was right for hiring the first executive director, one person's name rose to the top of the list – Carl Andersen. The county had no trained museum people and Carl knew the organization very well. Carl was flattered, of course, but wasn't sure he wanted to take on the job. He was a retired executive of a local company, so he had some management background but his main concern was his lack of formal training in museums.

Carl reluctantly accepted the job. He attended workshops and training put on by the state-wide museum association and field services office. After about a year, he was feeling pretty good about what he had learned about running the museum.

Then he began to notice that the board was becoming less engaged in the running of the museum. They often didn't have quorums at meetings. The president of the board didn't even look at an agenda until the meeting–she just let Carl create it–after all he knew what was going on better than anyone else.

Carl called the field services office for advice….

Group Discussion Questions:

1. What are the appropriate roles for staff and boards? Are the roles flexible in smaller all-volunteer organizations or organizations with small staff?
2. Should Carl have been hired at all? Was he the best choice? Was the hiring process appropriate?
3. Why did the board pull back?
4. What are some ways to engage the board?
5. If Carl was a bad Executive Director, would the board be more involved? Would they need to be more involved? Should Carl pull back and do less? Should the staff ever do less than their best?

Tips:

- There should be distinct board, staff and volunteer roles even if more than one person is fulfilling those roles. The person should know when they are "wearing which hat." You'd never want board members that are painting a wall in the museum, to have an impromptu board meeting, without a public notice or all the board members in attendance. Even discussing board business outside of a board meeting is problematic at best and unethical at worst.

- Paid staff should always look to the board for long term direction and goals. When a staff person is very competent, the board might not feel the need to be as involved. Reminding the board of their role is important.
- Consider creating board members job descriptions.
- Board members often need training to understand their roles and responsibilities. No one is born knowing how to serve on a board. Consider bringing in someone to conduct board training.
- Carl should speak with the board president about his frustrations and concerns. A paid staff member has a very difficult time telling the board they are not doing their job – after all, the board is his boss. Carl's concerns should be brought to the board's attention by the board president.
- If all else fails, Carl might create a list of goals for the organization and ask the board if they agree with this direction. The point of creating the goals is to engage the board in discussion, not necessarily getting them to agree with specific recommendations.

Life on the Road
By Myers Brown

Field Services personnel, as the name implies, spend many hours in the field or on the road. In fact, to be truly effective and to develop relationships with constituents, a field services provider must be willing to travel. This often separates field services providers from the main office and from family.

Life on the road can be taxing, stressful, boring, isolated, and, yes, even fun. What follows are a number of suggestions that may make life more tolerable, enjoyable, prevent burnout and hopefully, helps make the travel fun.

Please note that this is the approach used by some Field Service offices. Other Field Services personnel follow different methods. While some of these recommendations might work for you, policies and procedures are left up to individual offices and are influenced by existing circumstances.

1. Have a cell phone and stay in communication with family and the main office/support staff. Being removed from family can create stress. Call home often. Likewise, it is rather difficult to maintain a connection to the main office. Check in on a regular basis with both home and office.
2. Be conscious of schedule and resist the temptation to over schedule. Avoiding excessive travel helps maintain mental clarity, allows rest, and keeps relationships with friends and family healthy.
3. Avoid, at all costs, the offers to stay in the residences of the constituents. You need time away from the constituents after a day or more of a site visit. Time removed from the constituents is money well spent.
4. Utilize a laptop to maintain contact via email or to access resources. However, the presence of this tool can also lend itself to overwork. Avoid the temptation to work after hours.
5. Maintain your personal health and be sure to take time away from the road and from demands of the job. A mentally depleted or physically exhausted field agent provides inferior service and can even be detrimental. You need down time, especially after several days on the road.
6. Make sure you have a book to read or a hobby or watch television at night in the hotel room so that you separate yourself mentally from the work place.
7. Try to maintain physical health-eat as healthy as you can. Utilize hotel gymnasiums or swimming pools for exercise.
8. Carry a small cooler with snacks and drinks. It will save you money and provide you with healthier snacks than those found in convenience stores.
9. Getting a good night sleep on the road is often difficult, but it is essential. Try pack things that make your hotel room more like your normal sleeping arrangements. If it helps, bring your own pillows. If you normally sleep with a fan running, bring a fan.
10. Pack your favorite music for road trips.
11. Be sure you have a good road map in your car or if budget allows, a GPS

12. If your agency/organization allows it, become a member of various hotel chains. The points add up quick and you can use them for uncovered travel or personal travel.
13. Learn to travel light.
14. Keep a number of staples packed in your "go-bag". This includes items like shaving cream, shampoo, antacids, q-tips, travel toothbrush, toothpaste, dental floss, a sewing kit and any other items you need on a daily basis.
15. If possible, frequent the same hotel when you visit a city or town. As those employees get to know you, they can be a big help.
16. Frequent local restaurants. It benefits the community while also connecting you to the locals you seek to assist.
17. Road trips are taxing. Your agency should understand that travel, even though you are often just sitting and driving, is hard on the field service provider and even harder on those agents with families. The home agency should be aware of this and be flexible with work hours.
18. If you use travel vehicles from a motor pool, build a relationship with the staff at that organization. If they know you, they will work to provide you with the best vehicles available.
19. Always travel with business cards, a rain coat, work boots, a hat, a jacket, work gloves, and cotton or nitrile gloves.
20. Try to have hand sanitizer and or a package of baby wipes in the car.
21. When driving, try to stop every so often. Get out of the car, walk, jog, run or stretch.
22. When fatigued on the road, stop and sleep. An injured field service provider is neither effective nor desired.
23. Bring your own alarm clock. There is nothing more annoying than the alarm clock. The only thing more annoying is a hotel alarm clock. They are loud and often unreliable. Get a travel alarm clock, use it on a daily basis at home and then take it on the road. At least it provides consistency and reliability.

Items for Field Services

Below is a list of supplies any field services program should keep. This is not an exhaustive list includes many of the items needed.

1. Lap top
2. Projector
3. Camera
4. Light meter
5. Portable hygrometer
6. Ph pen
7. Respirator
8. Work boots
9. Extension cord
10. Cell phone/Blackberry/ smart phone
11. Car/van
12. Access to a Power Point projector
13. Fax machine
14. Scanner
15. Tape measure
16. Flashlight
17. File cabinet
18. Breath mints
19. Cotton gloves
20. Nitrile gloves
21. Printer
22. Textile vacuum
23. Long distance phone service
24. Samples of archival materials
25. Reference library
26. Business cards
27. Protective eye wear
28. Work clothing for visits to historic structures/construction sites
29. Travel budget
30. Training budget
31. Supplies
32. Power strip
33. StEP's workbook
34. GPS
35. Portable electronic storage devices
36. Approved hard hat for some site visits
37. Credit card for emergencies/overnight travel

Resources for Field Service Offices and Their Clients
By Patricia L. Miller

Lending Library

Field service offices can offer publications that clients may borrow. Typically these are practical books, technical leaflets, and current articles about core areas of operation. The library can be organized in many ways. One suggestion is follow the six standards areas in the StEPS program (mission, vision, governance; audience; interpretation; stewardship of collections; stewardship of historic structures; and management). Another suggestion is using broad topic categories such as collections management, interpretation, exhibits, etc. then use more specific topics within the broad categories. Ultimately each office chooses the format that makes the most sense for that office.

One very useful feature of a lending library is that borrowers can review a publication before purchasing it to see if it is useful to their organization. Online resources for determining a publication's usefulness are also available. The Connecticut Humanities Council (CHC), for example, writes reviews of books in its lending library and posts them on its web site. The CHC successfully secures review copies from publishers for this purpose.

Acquiring publications for a lending library or a field services library might be a project that would be funded by a corporate sponsor. It could be something that the organization's members would fund by purchasing a particular book. Such items could have a bookplate with the donor's name in it.

Pros for establishing a lending library

- The book list raises awareness about helpful publications. It can be included with a printed newsletter, as a stand-alone publication, or on a web site.

- It is a tangible service.

- Printed resources backup verbal advice.

- The library can offer items in addition to books:
    - vacuum with Hepa filters
    - u/v meter;
    - light meter
    - black light and goggles for examining for mold
    - pH pen
    - samples of buffered and unbuffered acid-free tissue

- other archival materials, such as polyethylene, polystyrene, or polyester, acid-free boxes, gloves, etc.

Cons for establishing a lending library

- Resource may be under-used.
- It takes staff time to keep the library up to date and to track circulation.
- The library takes up physical space.
- Wear and tear on the resources may require frequent replacement.

Tips for maintaining a lending library

- Determine if the service is fee based
  - Penalties for late returns
  - Deposit required
- Keep the check out system simple.
- Use a sign-out sheet
  - Card system
  - Computer tracking system
  - Excel spreadsheet
- Establish a time frame
  - 4 -6 weeks is a good length
- Renewal policy
- Create a wait list
- Shipping method
  - Decide who pays postage
- Eligibility for borrowing
  - Open to all museums
  - Open to members
  - Open to a certain geographic area

There are two types of libraries to consider.

- Lending library open to the public

- Reference library for field services personnel to use

Combing resources together for one library or having two distinct libraries is a matter of personal preference. Either method will work. The resources below are broken into lending library and reference library. Some publications are found on both the lending library list and the reference library list. These lists are not exhaustive and new resources are printed each year so it is beneficial to stay up to date with new publications.

Acquiring publications for a lending library and/or a field services reference library can be expensive. This is a great opportunity for sponsorships and donations. This project has broad appeal since it can potentially assist all museums in the service area.

Publications for a lending library

General resources

American Association for State and Local History (AASLH) leaflets
American Association of Museums (AAM) *Museum* issues
AAM conference CDs
AASLH *History News* issues
Midwest Outdoor Museum Coordinating Council *Magazine* issues

Publications below are arranged by the six standards areas of StEPs (Standards and Excellence Program for History Organization): Mission, Vision, and Governance; Audience; Interpretation; Stewardship of Collections; Stewardship of Historic Structures and Landscapes; and Management. Some publications are listed in more than one section.

Mission, Vision, and Governance

American Association of Museums. *Accreditation Resource Kit*, 3rd edition. Washington, D.C.: American Association of Museums, 2006. (Look for a new edition soon.)

_____. *Mastering Civic Engagement: A Challenge to Museums.* Washington, D.C.: American Association of Museums, 2002

_____ *National Standards and Best Practices for U.S. Museums.* Commentary by Elizabeth E. Merritt. Washington, D.C.: American Association of Museums, 2008.

American Association for State and Local History. Statement of Ethics

Audience

American Association of Museums. *Excellence and Equity: Education and the Public Dimension of Museums*. Washington D.C.: American Association of Museums, 1992.

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Field Services Office Reference Library

Field Services offices find it useful to have an array of publications at their fingertips that are good references and that can reinforce advice that the office may give to clients. The clients are often looking for something in print that can help them make a case for something. Some of these publications would be the same as ones in the lending library, but others could be more specialized. The manuals from ALI-ABA conferences come to mind.

Some publications that might be in a field services reference library are:

General Resources

American Association for State and Local History (AASLH) technical leaflets
American Association of Museums (AAM) *Museum* issues
AAM conference CDs
AASLH *History News* issues
MOMCC Magazine issues

Publications below are arranged by the six standards areas of StEPs (Standards and Excellence Program for History Organization): Mission, Vision, and Governance; Audience; Interpretation; Stewardship of Collections; Stewardship of Historic Structures and Landscapes; and Management. Some publications are listed in more than one section.

Mission, Vision, and Governance

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------. *National Standards and Best Practices for U.S. Museums*. Commentary by Elizabeth E. Merritt. Washington, D.C.: American Association of Museums, 2008.

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------. *Rethinking the Museum and Other Meditations*. Washington, D.C.: Smithsonian Institution Press, 1990.

Web Resources
Field Services offices need to be familiar with Web resources they can recommend to clients. These include:

General Resources

- Technical leaflets listed on the FSA Web site

www.aaslh.org/FSA/fsaleaflets.html
- E-newsletters listed on the FSA Web site
- American Association of Museums (AAM) Information Center (for members)
  www.aam-us.org

Helpful electronic resources are arranged by the six standards areas of StEPs (Standards and Excellence Program for History Organization): Mission, Vision, and Governance; Audience; Interpretation; Stewardship of Collections; Stewardship of Historic Structures and Landscapes; and Management. Some publications are listed in more than one section.

Mission, Vision, and Governance
Altamira Press
www.altamirapress.com

American Association for State and Local History [including special interest groups]
www.aaslh.org

American Association of Museums
www.aam-us.org [some items restricted to AAM members, including members of professional networks]

American Association of Museum Volunteers
www.aamv.org

Blue Avocado
www.blueavocado.org

Board Source
www.boardsource.org

Board Café [archived electronic newsletters]
www.compasspoint.org/board-cafe/

Fieldstone Alliance
www.fieldstonealliance.org

Independent Sector
www.independentsector.org

Minnesota Council of Nonprofits
www.mncn.org/index.htm [see "Info Central" section for helpful resources]

National Trust for Historic Preservation
www.preservationnation.org

Standards and Excellence Program for History Organizations (STePs)
http://home.learningtimes.net/aaslh [updates on many resources]

Audience

Altamira Press
www.altamirapress.com

American Association for State and Local History [including special interest groups]

www.aaslh.org

American Association of Museums
www.aam-us.org [some items restricted to AAM members, including members of professional networks]

American Association of Museum Volunteers
www.aamv.org

Australian Museum Audience Research Center
australianmuseum.net.au/Audience-Research

Committee on Audience Research and Evaluation (an AAM Professional Newwork).
www.care-aam.org

Field Services Alliance
www.aaslh.org/FSA/fsaleaflets.html

Institution for Learning Innovation
www.ilinet.org

Museum-l. An online discussion group open to all. Information online.

Museum2.0
http://Museumtwo.blogspot.com [blog that explores how museums can use Web 2.0 to make them more engaging and community-based]

Museum Audience Insight
http://reachadvisors.typepad.com/museum_audience_insight [blog by Reach Advisors marketing strategy firm]

Visitor Services Professional Network (an AAM committee).
http://groups.yahoo.com/group/vsmus/

Visitors Studies Association
www.visitorstudies.org

Visitors' Voices. (AASLH affinity group.)
www.aaslh.org

Interpretation

Altamira Press
www.altamirapress.com

American Association for State and Local History
www.aaslh.org

American Association of Museums
www.aam-us.org [some items restricted to AAM members, including members of professional networks]

Museum-Ed (AAM Professional Network).
www.museum-ed.org

National Association of Interpretation
www.interpnet.com

National Association of Interpretation Definitions Project.
www.definitionsproject.com/definitions/index/cfm [offers definitions of common terminology used by interpreters, environmental educators, historians, and others in non-formal settings such as parks, aquariums, zoos, nature centers, historic sites, and museums]

National Park Service. Teaching with Historic Places
www.nps.gov/history/nr/twhp [free classroom-ready lesson plans on a large variety of topics]

National Storytelling Network. *Storytelling Magazine.*
www.storynet.org

National Trust for Historic Preservation
www.preservationnation.org

Standards and Excellence Program for History Organizations (STePs)
http://home.learningtimes.net/aaslh [updates on many resources]

USS Constitution Museum. Family Learning Forum www.familylearningforum.org

Stewardship of Collections

Altamira Press
www.altamirapress.com

American Association for State and Local History [including special interest groups] www.aaslh.org

American Association of Museums
www.aam-us.org [some items restricted to AAM members, including members of professional networks]

American Institute for Conservation of Historic and Artistic Works
www.conservation-us.org [help locating a conservator and family heirloom care information]

American Museum of Natural History. "Museum SOS."
www.museum-sos.org

Canadian Conservation Institute
www.cci-icc.gc.ca [list of CCI Notes available for purchase]

Canadian Heritage Information Network. Copyright Guide for Museums and Other Cultural Institutions, 2007.
www.chin.gc.ca/English/Intellectual_Property/Copyright_Guide/index.html

dplan: The Online Disaster-Planning Tool
www.dplan.org [free online disaster planning template]

Federal Emergency Management Agency
www.fema.gov

Heritage Preservation
www.heritagepreservation.org [information and publications on Conservation Assessment Program, Heritage Emergency National Task Force, Heritage Health Index, and Save Outdoor Sculpture programs]

Hirtle, Peter B. "Copyright Term and the Public Domain in the United States." Cornell Copyright Information Center, 1 January 2011.
www.copyright.cornell.edu/resources/publicdomain.cfm

Library of Congress

www.loc.gov/preserv/care/ [technical leaflets on collections care available free of charge]

Museum SOS
www.museum-sos.org/htm/index.html

National NAGPRA
www.nps.gov/history/nagpra [information and updates on the Native American Games and Protection and Repatriation Act]

National Park Service Conserve O Grams
www.nps.gov/history/museum/publications/conserveogram/conserv.html

National Park Service. Museum Handbook. Parts 1-3.
www.nps.gov/history/museum/publications/index.htm

National Trust for Historic Preservation
www.preservationnation.org

Northeast Document Conservation Center
www.nedcc.org/ [free preservation leaflets on preservation planning, environmental monitoring and control, emergency management, collections storage and handling, photographs, reformatting, and conservation]

The Henry Ford
www.thehenryford.org/research/caring.aspx

Regional Alliance for Preservation
www.preservecollections.org

Society of American Archivists. "Museum Archives Guidelines."
www2.archivists.org/governance/Museum-Archives-Guidlines

Standards and Excellence Program for History Organizations (STePs)
http://home.learningtimes.net/aaslh [updates on many resources]

Historic Sites and Landscapes

American Association for State and Local History [including special interest groups]
www.aaslh.org

American Association of Museums

www.aam-us.org [some items restricted to AAM members, including members of professional networks]

American Public Gardens Association
www.publicgardens.org

Association of Prservation Technology International (APT). "Williamsburg Resolutions on Architectural Fragments"; "New Orleans Charter"; Lighting in Historic Museum Buildings"; and "20th Century Museum Guidelines."
www.apti.org/resources/charters.cfm

Heritage Preservation. "Before and After Disasters: Federal Funding for Cultural Institutions," 2005.
www.heritagepreservation.org/PDFS/Disaster.pdf

Heritage Preservation. "Best Practices for Conditions Assessments of Historic Structures," 2004.
www.heritagepreservation.org/PDFS/BestPracticesArch.pdf

Heritage Preservation. "Guide to Navigating Federal Emergency Management Agency and Small Business Administration Disaster Aid for Cultural Institutions." revised edition, 2009.
www.heritagepreservation.org/PDFS/GuidetoNavigatingFEMASBA.pdf

International Council on Monuments and Sites
www.international.icomos.org/charters.htm

National Park Service [Historic Landscape Initiative; Periodicals and other Publications; Preservation Briefs; Preservation Tech Notes]
www.nps.gov/

Standards and Excellence Program for History Organizations (STePs)
http://home.learningtimes.net/aaslh [updates on many resources]

U.S. Secretary of the Interior. Standards and Guidelines
www.nps.gov/history/hdp/standards/index.htm

Vaughan, James. "Introduction The Call for a National Conversation." Forum Journal, 22 (3), (Spring 2008): 5-9.
www.preservationation.org/forum/spring-2008.

Management

Altamira Press
www.altamirapress.com

American Association for State and Local History [including special interest groups]
www.aaslh.org

American Association of Museums
www.aam-us.org [some items restricted to AAM members, including members of professional networks]

American Association of Museum Volunteers
www.aamv.org

Blue Avocado
www.blueavocado.org

Board Source
www.boardsource.org

Board Café [archived electronic newsletters]
www.compasspoint.org/board-cafe/

Fieldstone Alliance
www.fieldstonealliance.org

Heritage Preservation
www.heritagepreservation.org [information and publications on Conservation Assessment Program, Heritage Emergency National Task Force, Heritage Health Index, and Save Outdoor Sculpture programs]

Independent Sector
www.independentsector.org

Minnesota Council of Nonprofits
www.mncn.org/index.htm [see "Info Central" section for helpful resources]

National Trust for Historic Preservation
www.preservationnation.org

Society of American Archivists. "Museum Archives Guidelines."
www2.archivists.org/governance/Museum-Archives-Guidlines

Standards and Excellence Program for History Organizations (STePs)
http://home.learningtimes.net/aaslh [updates on many resources]

Online Discussion Groups
Online discussion groups are helpful sources of information. Some require membership, but others are open to anyone and can be found by doing an online search.

Discussion Groups

- Museum-l; a discussion group with general museum topics
- Museum-Ed; a discussion group specific to museum education issues
- AASLH Small Museums listserv; a discussion group specific to small museum issues
- FS-List; a discussion group specific to Field Services offices

- Forms and policy examples

Perry, K.D., ed. *The Museum Forms Book*, Third ed. Austin, Tex.: Texas Association of Museums, 1999. (Available to purchase from TAM)

American Association of Museums Information Center (restricted to AAM institutional members, but has links to some sites)

Conclusion

This Field Services Manual has been a goal of the AASLH Field Services Alliance for decades. This manual is not intended to be final; instead, it will always be a living document that changes in order to suit the needs of field services offices and our clients. It is my hope that the manual will eventually become the basis of "best practices" for our small but important field.

On behalf of the Field Services Alliance, I want to thank the authors, editors and the AASLH staff that have volunteered to create the initial version of this document.

Jeff Harris
Field Services Alliance, Chair, 2012