

MAP

Museum Assessment Program



**MUSEUM ASSESSMENT PROGRAM (MAP)
INSTITUTIONAL ASSESSMENT
INSTITUTE OF TEXAN CULTURES
SAN ANTONIO, TEXAS**

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EXECUTIVE SUMMARY

The Institute of Texan Cultures (ITC) is at an important crossroads in its development. The Museum Assessment Program consultation is one of several initiatives that are being undertaken to move the organization toward operations that meet professional museum standards, with the goal of achieving accreditation by the American Association of Museums. The ITC is developing a strategic plan that correlates the museum's growth and development with that of the University of Texas at San Antonio's plans to be recognized as a top tier research institution. The institute has recently adopted an updated mission statement, a vision statement, and core values. It is also developing a business plan, a revised collections policy, and other policy statements.

The ITC builds on a foundation of more than forty years of service to Texans and to visitors from throughout the state and beyond. The institute has offered opportunities for research, has presented long-term and temporary exhibits, and has developed educational programs that support its goals of helping people understand and appreciate Texas history. The ITC's long-standing Festival of Texas Folklife and more recent Asian Festival have introduced many thousands of people to aspects of Texan cultural heritage.

The museum recognizes the need to update its interpretation to meet current standards and to devote resources to improved collections stewardship, especially in the area of long-term loans that arose out of early directives to be a non-collecting institution. With support from the university, the museum will be expanding its collections according to a defined collecting plan. The museum also faces deferred maintenance for the physical plant and needs for improved environmental controls. Strategic planning, coupled with written policies and procedures, will help give direction to the museum's growth.

INTRODUCTION

The Institute of Texan Cultures (ITC) applied for an Institutional Museum Assessment Program (MAP) grant on November 30, 2009, and completed the self-study on April 30, 2010. The Museum Assessment Program is supported by the Institute for Museum and Library Services and is administered by the American Association of Museums. Several important activities occurred during 2009 and 2010 that affected the ITC's MAP consultation. A new executive director, hired in February 2009, was the impetus for the MAP study. During 2009 and 2010 he assembled a leadership team, composed largely of new people. Several people on the administrative team have been with the organization for a few years, although perhaps in somewhat different capacities, as well as long-term employees who bring corporate memory to the mix.

Between the time the MAP application was initiated and the peer review visit, the new executive director led the organization in reviewing and updating the mission, and the final draft of a strategic plan was completed. This still awaits approval. In addition, the director was successful in obtaining support from university administration to become a collecting institution and to be more fully operated as a museum. These two factors were treated with some ambiguity in the past. The ITC is now referred to as the museum, whereas in the past it was most often referred to as the institute.

The site visit occurred June 1-4, 2010. I had an opportunity to meet with the executive director, all of the key staff who served on the MAP team, the museum's university liaison, and several other people, including the chair of the development board, library staff, the museum store manager, facilities employees, and security personnel. A complete schedule is attached to the report as Appendix I.

The Institute of Texan Cultures identified three objectives for the MAP consultation. The first was preparation for museum accreditation. The second was an assessment of collections stewardship. The third, input regarding a business plan, was modified to focus on the recent strategic planning process. This report will address these topics.

INSTITUTIONAL HISTORY

The Institute of Texan Cultures (ITC) was established on property that was initially used as the State of Texas exhibit for the 1968 HemisFair. It occupies fifteen acres owned by the University of Texas at San Antonio (UTSA), which was founded in 1969, and is located in downtown San Antonio. Primary activities of the ITC are housed in a 175,000 square-foot building, which includes exhibit galleries, classrooms, an auditorium, a dome theater with a multimedia presentation, a library, a conference center, staff and volunteer offices, and production facilities, plus outdoor verandas, and a park with replicas of historic buildings. The building also houses other university departments, notably the university archives, which is a division of the UTSA library.

The ITC has an annual budget of approximately \$4 million, a staff of 55 employees, and a volunteer staff of 260. The museum also receives support from facilities and security personnel. Attendance of about 164,000 includes school and adult tour groups and the general public, educational programs, and special events, such as the Texas Folklife Festival and the Asian Festival. Outreach programs, bring in additional students and adult groups each year.

MISSION AND PLANNING

A. Mission

The museum adopted a new mission in March 2010:

“The Institute of Texan Cultures, through its research, collections, exhibits, and programs, serves as the forum for the understanding and appreciation of Texas and Texans.”

When the MAP team conducted the MAP mission activity, it found that while many of those queried about the mission could relate their roles to the mission after it was repeated to them, not many people were able to come up with the mission on their own, due to the fact that the revision was so new and the older mission statement was still being used in some places. The committee plans to work on this. One way might be to print up small cards, the size of business cards with two questions and two answers: “What is the mission of the museum? To serve as a forum for the understanding and appreciation of Texas and Texans,” and “How does the museum accomplish this? Through its research, collections, exhibits, and programs.” Breaking it into two components might make it easier to remember. The committee also intends to develop information that will help each staff person know how his or her role supports the mission.

The brevity of the mission is an aid to making it easy to remember. However, the new mission does not specify who the museum serves. The committee recognizes this and is considering adding a preamble that would describe the audience. In addition to the mission statement, as a part of strategic planning, the museum has also created a new vision statement and a list of core values. The vision is:

“The ITC strives to become the nation’s premier institution of contemporary cultural and ethnic studies focusing on Texans and the diverse cultural communities that make Texas what it is. It will do this by developing innovative programs and exhibits that engage UTSA, Texas, and the nation. The ITC approach encourages interaction, collaboration, and study, thus developing a new vision of contemporary cultural studies for both the general public and academic audiences. We will achieve this through exhibits, research, public and academic programs and events, a focused collecting program, and active opportunities for use of material culture objects and archives of distinction.”

For core values, the ITC adopted those of UTSA, with the addition of stewardship: Integrity, Excellence, Inclusiveness, Respect, Collaboration, Innovation, Stewardship. The combination of the mission, vision, and core values gives the museum a solid foundation that expresses why it exists, what it values, and what it wants to accomplish. All activities and decision-making should flow from the mission.

RECOMMENDATIONS:

1. Take steps to make sure every employee and volunteer knows the mission.
2. Add a preface to the mission to explain who is served.
3. Disseminate the mission to UTSA and to all stakeholders and the general public.

B. Planning

Soon after the new executive director arrived, the museum hired a consulting firm to assist in developing a strategic plan that would complement the UTSA’s master planning. As the university moves toward becoming recognized as a major research institution, the Institute of Texan Cultures’ research role and academic mission will also expand. The ITC’s collection

stewardship responsibilities will also increase, with accreditation by the American Association of Museums as a major goal.

The museum's strategic goals and objectives will be presented to the university in the near future. They support the university's over-arching strategic initiatives and its mission that is "dedicated to the advancement of knowledge through research and discovery, teaching and learning, community engagement and public service." The ITC goals and objectives further identify three UTSA areas of collaborative excellence: energy and environment, human and social development, and sustainability. The ITC strategic plan identifies twelve goals and objectives, ranging from image and identity to building and site, and including the specific goal of achieving museum accreditation. The strategic plan focuses on ITC organizational needs, while only minimally considering some of its facility needs at this time. The plan forecasts approximately ten years, with the first five years devoted to upgrades in operations, and the second five years looking toward more comprehensive changes that may include major renovation, relocation, or reconstruction of a new facility. The next step in the planning process will be to identify specifics of time, cost, and execution, including assigning responsibilities for various components.

Some of the issues that will be addressed as the museum continues its planning include: a possible name change; audience analysis and development of programs for identified constituencies; adoption of policies and standards of operation for accreditation; expansion of the museum educational programs, especially with the academic community; expansion of research and academic opportunities, including a museum studies program; establishment of strong relationships with both academic and public audiences; revision of collections policies, adoption of a collections plan, conservation assessment of the objects and photograph collections, and

expansion of involvement by UTSA students with collections; creation of a permanent exhibits master plan, development of a changing exhibits plan, and consideration of a traveling exhibit program; creation of a range of written administrative, board-related, collections-related, and accreditation-related policies and plans; evaluation and creation of a staffing plan for paid employees and volunteers; exploration of appropriate revenue-generating programs to aid the museum in becoming more financially independent; and a thorough analysis of space and operational needs for an accredited university museum.

RECOMMENDATIONS

1. Put all planning options on the table for discussion, from changing the name to exploring current and potential revenue streams.
2. Continue to refine the goals by specifying a timetable for completion, forecasting costs, and assigning responsibilities for tasks.
3. In looking towards a possible new building, consider the museum's needs for financial resources, human resources, collections stewardship, and an adequate physical plant, including grounds and parking.
4. Review the requirements for a strategic plan as defined by the AAM Accreditation Program. The plan must address all relevant areas of museum operations, list goals, list action steps, assign responsibility for accomplishing action steps, assign both the human and financial resources needed to implement the plan, list steps to obtain resources, and include a timeline. Various published sources can assist the process moving forward. These include John M. Bryson and Farnum K. Ashton, *Creating and Implementing Your Strategic Plan: A Workbook for Public and Nonprofit Organizations*, 2nd edition (Jossey-Bass, 2004), and Gary Edson and David Dean, *The Handbook for Museums* (Routledge, 1996).

INTERPRETATION AND EDUCATION

The Institute of Texan Cultures is a much-beloved icon of San Antonio. Yet, in spite of provocative and engaging temporary exhibits, it is difficult to attract repeat visitors. Attendance figures show a significant drop over the past few years. While some of this can be attributed to factors such as the recent H1N1 flu epidemic, the museum is examining other influences that also have contributed to the decline. The permanent exhibits and the multimedia show essentially have been in place since the museum was created in 1968. While there have been updates in parts of the exhibits through the addition of audio/visual components, some visitors may feel there is nothing new to experience.

There is limited free parking for the museum and the approach from the parking lot is somewhat confusing for the uninitiated. The museum is part of the HemisFair Park, but the actual onsite location is not as integrated with the park as it looks on a map. The signage in the park, however, is good, and most directions to the museum are clear.

There is some ambiguity about who the museum intends to serve and how to most effectively reach its constituencies. Although the population of San Antonio is 60% Hispanic and Latino (with approximately 36% statewide), and the staff of the museum is appropriately diverse, the museum has not been as successful as it would like to be at attracting visitors and supporters from this audience.

The museum intends to contract with an audience survey consultant to get a better picture of who is being served and the potential for developing new audiences. Recently an RFP was issued for an exhibit master plan that will completely revise the permanent exhibits. Instead of a series of

small areas featuring many ethnic groups that make up the cultural heritage of the state, the museum will present a more integrated story of how the various immigrants interacted with each other, both contributing to the mix of cultures and retaining some intrinsic values that add to the diversity of the Texas today. This story of assimilation and resistance will offer an updated view of the complex identity of Texans.

Changing exhibit galleries offer the museum opportunities to address contemporary issues, and are accompanied by educational programs. A recent exhibit, “Race: Are We So Different?” was well-received, and three current exhibits address a variety of themes. “Small Town Texas,” a photo exhibit, includes an audio interview of the exhibit’s creator, Ricardo Romo, president of UTAS. Dr. Romo traveled about small, rural Texas communities, recording the daily lives of the inhabitants. “Small Town Texas” is coordinated with an exhibit created by students in the small community of Beesville. The students made drawings of buildings in their town and wrote short essays about why they loved their community.

“Lone Star and Eagle: German Immigration to Texas” displays items from the ITC collection and from Humanities Texas that tell the story of German immigrants, what they brought with them, and how they contributed to life in Texas. Another exhibit, “A Salute to Military Flight,” shows images of airplanes and fliers from the World War I era. All of the exhibits support the museum’s mission. They are typically enhanced with audio/visual components.

The museum serves public and private schools, as well as home schools. The education department offers teachers’ workshops, online curriculum guides, field trips, and outreach presentations through Tex-kits. There is a need for grants or other donations to underwrite school visits. The museum trains graduate students in oral history and sends them into the community.

Volunteers from the YMCA were trained as docents for the “Race: Are We So Different?” exhibit. There are forms to evaluate exhibits, but they need to be expanded.

The museum also has an interactive area for school groups, called the Back Forty. This is a complex of replicated buildings where school groups and others can be introduced to the past through hands-on activities in a log cabin, a barn, a one-room school, a fort, and an adobe house. Museum volunteers are stationed in each building and spend about ten minutes with each group of students, demonstrating utensils and objects that relate to their sites. This complex dates to the early days of the museum. As future plans for the museum develop, it will be advisable to review the program and see if it is still an effective teaching tool. If so, it may require some major physical alterations or relocation.

RECOMMENDATIONS

1. As the permanent exhibits are reworked, develop a written exhibit plan, with goals coordinated with the mission, vision, and core values.
2. Ensure that the museum’s educational goals permeate all programs and activities from earned income venues to the museum store.
3. Strengthen the evaluation of exhibits and educational programs. The information gained will help in further planning and in measuring success.

COLLECTIONS STEWARDSHIP

Early leadership in the ITC discouraged acquiring items for a permanent collection, instead favoring loans to the Institute. Over time, some of the loans were left at the ITC for extended periods and not always tracked for their status. Currently, the collections staff members are working to resolve the old loans, either returning them to the lenders or taking steps to acquire ownership. An overall inventory process is underway. Revisions to the collections policy also give direction and will assist in meeting professional standards.

Collections storage has been relocated from the lower level of the museum (six feet below the water table) to the third floor. Manually-operated compact shelving exists, but it is nearing storage capacity. A number of water pipes are present overhead in the storage area, which is not ideal, but is less hazardous than the previous location. The staff is monitoring the environment with data loggers and working to control the temperature and humidity. The temperature is more stable than the humidity. A large humidifier is in place for the winter, and there are plans to add dehumidifiers for the summer months. Temperature and humidity also are difficult to control in the exhibit areas, partly due to air exchange from large exterior sliding doors. The museum has plans to install new doors with vestibules to cut down on the air loss.

The current collections staff members have inherited an old registration system and use of cardboard tags to identify artifacts. Unfortunately, some of the tags have become separated from the objects, either by accident or when items have been put on exhibit. Renumbering artifacts is not a recommended practice; setting a date at which to begin marking new items with a standard tri-nominal numbering system is advised. Fortunately, PastPerfect collections software accommodates both old and new numbering systems.

The museum has a library that is actively used for research. It houses a collection of 3.5 million photographs that are in demand for the museum's exhibits and programs, and for use by other organizations. The library also has holdings in books and vertical file materials. Part of the library materials are housed in cool storage, shared with the UTSA Archives, which is headquartered in the museum. There are plans to establish some cold storage facilities to house photo negatives. The ITC library has digitized and put online 36,000 images to date. The library staff is diligent in recording information at the item level for the photographs, which is a great aid for researchers. The library has developed appropriate procedures to deal with copyright and other intellectual property issues.

RECOMMENDATIONS

1. Establish more communication and collaboration between the ITC library and objects collections departments. They have different software, methodologies, and procedures for collections management. The deeds of gifts and other forms need to be coordinated. If donors make gifts that are divided between the departments, there should be an efficient way to share the information. The library and collections departments also need to establish more communication and sharing of information with the UTSA archives.
2. Institute a generally accepted artifact numbering system and mark items with accession numbers, using approved methods.
3. Cover storage items that are out in the open with plastic sheeting.
4. Make planning for adequate environmentally-controlled storage for all of the collections a priority. Items on exhibit also need to be in controlled environments.
5. Develop written collections housekeeping and pest control policies and procedures.
6. Consider adding collections stewardship to the preamble to the mission.

7. A collections management policy is one of the required documents for accreditation.
Review the requirements in the accreditation application and ensure that ITA's policy contains all the required elements.
8. Consider applying for a Collections Management MAP assessment for a focused evaluation of collections procedures and policies.

ADMINISTRATION AND FINANCE

The new executive director and administrative team bring compatible skills and experience to the museum's management. The museum's organizational chart helps to identify how the various departments interface. The museum appears somewhat heavy on production staff. The number of exhibit designers, fabricators, and related personnel seems out of proportion for the number and complexity of temporary exhibits, especially since some are incoming traveling exhibits. A considerable amount of space also is allocated to exhibit fabrication, graphic arts, etc. Plans for the future include the possibility of creating and distributing traveling exhibits as a source of revenue.

Part of the museum's operating revenue comes through the university by way of a state appropriation. These funds support personnel and other operations. Other revenue sources include admissions, facility rentals, outreach, photo sales, the museum store, the festivals, membership, contributions, grants, and endowment investment income. Each income area is being reviewed to see where it might be strengthened. Admissions are affected by attendance, which is under study. A newly renovated conference space is intended to increase rental income. Outreach kits are being revamped. Photo sales continue to generate substantial income.

The museum store has undergone some changes in merchandise that have raised expenses, but also are expected to raise revenues. The museum store must always put its educational purpose first. Although the store has not been audited, some of the items might be subject to unrelated business income tax (UBIT), notably souvenir items. Because these items are low-cost and very popular with school groups, it might be worth paying the tax. With some, it might be possible to include printed material attached to the items or placed nearby to demonstrate an educational link, making the items related to the museum's purpose. A map of Texas, for instance, might be

accompanied by information about when it became a state, the places people emigrated from to Texas, etc. IRS Publication 598, “Tax on Unrelated Business Income of Exempt Organizations” (available online) has information about this issue. The most recent version is March 2010. An article on UBIT from the *Museum Store* magazine is attached to this report.

The Folklife Festival operates at a deficit, but is strongly identified with the museum’s image and is considered a premier event. The Asian Festival brings in a profit. Membership, contributions, grants, and endowment investment income are all being closely studied by the advancement department. A new membership campaign is in the works to reactivate a sizable body of lapsed members, and a new planned giving campaign is underway, as well. One complication regarding memberships is that over time, as the membership program was not emphasized, the Folklife Festival created its own friends group. As it is not feasible to have two membership organizations, the new membership brochure offers an opportunity for memberships to support the Folklife Festival (also exhibits, education and scholarships, and the Asian Festival).

The museum is supported by a development board. There are currently twelve members, but the board can be as large as twenty-seven. Members are selected by the current board from the business community and philanthropy. The board recently drafted bylaws and plans to eventually become a separate 501(c)(3) tax-exempt organization. Its primary role is to raise funds for the museum. The board chairman expressed an interest in accreditation and becoming familiar with museum standards. The largest budgeted expense is for personnel costs, as is typical of most museums. The museum allocates funds for travel and for professional development. Three staff members attended the recent American Association of Museums conference in Los Angeles.

Both facilities and security personnel are supplied by the university. The museum has written procedures for building maintenance and a schedule for cleaning, trash removal, etc., with provisions for extra needs. In the event that there are some unexpected situations, facilities staff people have access to university personnel with special skills such as plumbing, electrical, painting, carpentry, etc. When the museum needs something that is not in the schedule, it files a work order with UTSA facilities.

University security personnel are primarily assigned to the museum on a continuing basis, so they are familiar with the building, grounds, collections, etc. They are not armed, but can call for backup from the university police and have someone onsite in three minutes. The security officers read information from cameras posted throughout the building. They make rounds and are on duty until 10:00 pm. The officers receive training in CPR, first aid, emergency response, and other health and safety issues. The museum is included in a university-wide emergency plan, and museum staff participates in university training. There are smoke alarms, heat sensors, and a dry pipe fire suppression system. A requirement for accreditation is for the museum to have a disaster plan/emergency preparedness plan specific to the museum. It must cover hazards to people as well as hazards to collections. www.dplan.org contains a template for a museum-specific disaster plan.

The MAP team chose public experience as a self-study activity and concluded that the visitor experience is overall good, but there are numerous areas that could be improved from better signage and services for people with disabilities to property aesthetics. Some actions have already been undertaken. Others are pending.

The museum is fortunate to be supported by approximately 260 trained volunteers, in addition to special events volunteers who assist with the two festivals. Most volunteers undergo the museum's three-week training for docents, although some volunteers serve in other capacities. Volunteers are expected to contribute at least fifty hours a year. They are recruited from retirees, especially the military community and retired teachers, and are recognized at an annual banquet. Junior docents participate in the hands-on activities in the Back Forty and perform in the puppet show. They are honored with an annual luncheon. There is no formal evaluation, but the docents are shadowed by staff. There is ongoing training relating to temporary exhibits. The volunteers also have access to a convenient docent resource room with a computer and printed and electronic materials relating to content issues and to educational theory.

RECOMMENDATIONS

1. Look into the UBIT issue for museum store sales. Seek advice from a tax expert.
2. Analyze the Folklife Festival to see if there are ways for it to be more cost-effective and still support the museum's mission.
3. Continue to work on membership development and planned giving. These areas need to be strengthened.
4. Keep the development board informed as the museum moves towards accreditation.
5. Continue to offer professional training opportunities to staff. Add health and safety training for museum staff. Develop emergency planning geared to specific museum needs.
6. Develop an evaluation system for volunteers. This might be a form of self-evaluation. Consider reserving the term docent for volunteers who are interpreters.

GOVERNANCE

As a university museum, the ITC is governed by university rules and regulations. The museum's liaison is the vice president for community services; he is very understanding of the museum's mission and its special needs. The university president is a museum enthusiast and has encouraged it to seek accreditation.

The museum is required to comply with university procedures on many fronts. The facilities and security personnel have been mentioned, as well as the university emergency plan. The museum sends any grant applications through the university grants and contracts office, and it works to coordinate its fund-raising with the university's development office. The university is supportive of the museum's planned giving program, which is just underway, and of its efforts to increase membership.

RECOMMENDATIONS

1. Continue to keep communications flowing between the museum and university administration.
2. Keep the university officials informed about museum standards and the accreditation process.
3. Ensure that the university understands and appreciates the significance of the library and artifact collections to the museum's mission.
4. Seek opportunities to collaborate with students and faculty on museum-sponsored projects.

COMPILED RECOMMENDATIONS

1. Take steps to make sure every employee and volunteer knows the mission.
2. Add a preface to the mission to explain who is served.
3. Disseminate the mission to UTSA and to all stakeholders and the general public.
4. Put all planning options on the table for discussion, from changing the name to exploring current and potential revenue streams.
5. Continue to refine the planning goals by specifying a timetable for completion, forecasting costs, and assigning responsibilities for tasks.
6. Review the requirements for a strategic plan as defined by the AAM Accreditation Program. The plan must address all relevant areas of museum operations, list goals, list action steps, assign responsibility for accomplishing action steps, assign both the human and financial resources needed to implement the plan, list steps to obtain resources, and include a timeline. Various published sources can assist the process moving forward. These include John M. Bryson and Farnum K. Ashton, *Creating and Implementing Your Strategic Plan: A Workbook for Public and Nonprofit Organizations*, 2nd edition (Jossey-Bass, 2004), and Gary Edson and David Dean, *The Handbook for Museums* (Routledge, 1996).
7. In looking towards a possible new building, consider the museum's needs for financial resources, human resources, collections stewardship, and an adequate physical plant, including grounds and parking.
8. As the permanent exhibits are reworked, develop a written exhibit plan, with goals coordinated with the mission, vision, and core values.
9. Ensure that the museum's educational goals permeate all programs and activities from earned income venues to the museum store.

10. Strengthen the evaluation of exhibits and educational programs. The information gained will help in further planning and in measuring success.
11. Establish more communication and collaboration between the ITC library and objects collections departments. They have different software, methodologies, and procedures for collections management. The Deeds of Gifts and other forms need to be coordinated. If donors make gifts that are divided between the departments, there should be an efficient way to share the information. The library and collections departments also need to establish more communication and sharing of information with the UTSA archives.
12. Institute a generally accepted artifact numbering system and mark items with accession numbers, using approved methods.
13. Make planning for adequate, environmentally-controlled storage for all of the collections a priority. Place items on exhibit in controlled environments.
14. Develop written collections housekeeping and pest control policies and procedures.
15. Consider adding collections stewardship to the preamble to the mission.
16. A collections management policy is one of the required documents for accreditation. Review the requirements in the accreditation application and ensure that ITA's policy contains all the required elements.
17. Consider applying for a Collections Management MAP assessment for a focused evaluation of collections procedures and policies.
18. Look into the UBIT issue for museum store sales. Consult a tax expert.
19. Analyze the Folklife Festival to see if there are ways for it to be more cost-effective and still support the museum's mission.
20. Continue to work on membership development and planned giving. These need to be strengthened.

21. Keep the development board informed as the museum moves towards accreditation.
22. Continue to offer professional training opportunities to staff.
23. Add health and safety training for museum staff. Develop emergency planning geared to specific museum needs.
24. Develop an evaluation system for volunteers. This might be a form of self-evaluation.
Consider reserving the term docent to volunteers who are interpreters.
25. Continue to keep communications flowing between the museum and university administration.
26. Keep the university officials informed about museum standards and the accreditation process.
27. Ensure that the university understands and appreciates the significance of the library and artifact collections to the museum's mission.
28. Seek opportunities to collaborate with students and faculty on museum-sponsored projects.

SPECIAL CONSIDERATIONS AND RECOMMENDATIONS FOR MAP GOALS

ACCREDITATION

The strategic plan includes a list of recommended policies and plans. In addition, there are some required or recommended documents that will be needed for accreditation. Fortunately the museum has or is in the process of creating many of the documents. The Accreditation Commission's Expectations regarding various issues listed below may be accessed online at www.AAM-US.org.

1. Mission. As noted, identifying the audience served would strengthen the mission statement. It would also help to read the Accreditation Commission's "Expectations Regarding Institutional Mission Statements." All activities should be tied to the mission.
2. Statement of permanence. This is required for museums that have a parent organization. See the Accreditation Commission's "Expectations Regarding a Resolution of Permanence."
3. List of current members of governing authority, with their affiliations and terms. In this case, the commission would want to see information about the development board.
4. Institutional code of ethics for staff and governing authority. It would be advisable to extract the code of ethics from the collections policy and make a stand-alone document that puts forth the institution's basic ethical responsibilities as a museum and nonprofit educational entity and is not solely about individual conduct (i.e. conflict of interest issues.). The code of ethics should apply to staff, board, and

- volunteers. See the Accreditation Commission's "Expectations Regarding an Institutional Code of Ethics."
5. Strategic plan with goals, action steps, assigned responsibilities and resources, and timeline.
 6. Written evidence of the delegation of authority to the museum director. See the Accreditation Commission's "Expectations Regarding the Delegation of Authority."
 7. Documentation of future institutional plans. See the Accreditation Commission's "Expectations Regarding Institutional Planning."
 8. Collections Management Policy (including acquisitions, accession, deaccession, disposal, loans, conservation, and the Native American Graves and Protection and Repatriation Act (NAGPRA); a collections plan, if you have one. A good resource is *The AAM Guide to Collections Planning*, by James B. Gardner and Elizabeth Merritt, available from the AAM Bookstore.
 9. Collections management records, including accession record, catalog record, inventory record, deaccession form, loan agreement form, condition report form
 10. List of published research results (last five years)
 11. List of exhibitions, permanent and temporary (last five years)
 12. List of traveling exhibitions organized by the museum (last five years)
 13. Sample educational materials
 14. Program calendar
 15. List of publications (last five years)
 16. Samples of selected publications
 17. Organizational chart, including relationship to governing body
 18. Principal staff and salaries
 19. Position descriptions of key staff

20. Current resumes of staff
21. Personnel policy
22. Printed descriptive material pertaining to membership
23. Bylaws of affiliated organizations
24. Printed materials relating to affiliated organizations
25. Notice of tax-exempt status for affiliated organizations
26. Notice of tax-exempt status for museum
27. Current budget
28. Annual report (if available).
29. Emergency/disaster plan for staff, visitors, and collection
30. Photographs of all areas and operations
31. Site plan or floor plan (if available)
32. Whistleblower policy and records retention policy, in conformance with Sarbanes-Oxley legislation.

COLLECTIONS STEWARDSHIP

By the time the museum applies for accreditation, it should have resolved most of the long-term loan issues, and should be well along toward completing an inventory. The shift from loaned objects to developing a stronger museum collection will take some time and should be based on a collections plan and a proactive collecting program. One of the drawbacks with the long-term loans is that some have been placed in the permanent exhibits. Since loaning for more than a year or two is not recommended (with some exceptions), loan objects are not good candidates for permanent exhibits.

1. Acquire space for storing items from the permanent exhibit that will be moved to storage. A processing area also would be desirable.
2. Dust or vacuum artifacts as they are removed from permanent exhibits. Repack in acid-free containers as they are moved to storage.
3. Review use of funds that are raised from any deaccessioned objects. The AAM Code of Ethics supports funds to be used for purchase of new artifacts or direct care of collections, but the Government Accounting Standards Board (GASB) only permits the purchase of new collections, unless the collections are capitalized and treated as financial assets. The American Association for State and Local History's statement on capitalizing assets can be accessed online at www.aaslh.org/ethics.htm. AAM also has information on the capitalization of collections on its web site.

STRATEGIC PLANNING

The strategic plan is crucial to giving direction to the museum's future and to achieving accreditation. Careful crafting of the goals and objectives to coordinate with the university's 2016 strategic plan is a key element that places the museum within broader goals. The ITC plan offers both opportunities and challenges.

The opportunities to expand research capabilities and to become more a part of the academic community (including the possibility of operating a museum studies program) could help the museum become a more integral part of the university and less vulnerable to downsizing or elimination if the current supportive administration changes. The directive to become more financially independent is also a way to protect the museum's viability. A challenge is to balance the revenue sources and to keep focused on the museum's mission.

1. Prioritize steps in the strategic plan. Some can be undertaken concurrently, but some are sequential and may require fundraising before they can be initiated. That is why a timeline, cost forecasting, and assigned responsibilities are so important, especially for the first five years.
2. Analyze all current and potential revenue sources. For instance, before embarking on creating and distributing traveling exhibits, see if there is a need, and for what level of exhibits. Compare the projected revenue with staff needs, exhibit maintenance costs, and with space costs for offices, fabrication, scheduling, and storage. Consider the current facility, but also what would be needed in a new building. Take a similar look at a museum studies program. What is the competition? Would the museum want to initiate an undergraduate program or a graduate program? Would it be a generalist program or something specialized? Would such a program be welcomed by a specific university department, or would it be something of an orphan child?
3. Think hard about rentals and how they will serve the museum's needs and meet the mission. The current conference facilities, though small, are compatible with the mission. The dome rentals are more problematical. Rentals come with costs, some indirect, such as increased staff time, security, utilities, and maintenance. The food and flower issues relating to collections exposure to pests are ones that need thorough examination and written policies. It would help to compare other museums' experiences.
4. Consider ways to expand the museum store. Postcards or note cards from the photo collection would be inexpensive items that are related. In the future, the museum might be able to offer items online. That would require some careful planning.
5. Time spent on improving membership will pay dividends in support, not only in financial ways. Planned giving is also crucial to long-term sustainability.

6. Work with the development board to identify supporters who can help with a capital campaign. If the development board becomes an independent tax-exempt entity, the museum will want a written memorandum of agreement, so that everyone is clear on parameters.

SUMMARY

The Museum Assessment Program consultation combined a self-study by the museum's MAP team with a three-and-a-half-day onsite consultation and a follow-up report. Feedback from the museum staff indicated that the self-study was an effective tool in raising awareness and identifying areas that need work.

The onsite visit offered opportunities to meet with key personnel, to discuss strengths and weaknesses, to clarify needs for support, and to prioritize next steps. I was able to meet with twenty-five people, some on multiple occasions. I visited both the public areas and behind the scenes, spending some time on my own in the exhibits, the museum store, and on the grounds. Because I met with so many people, I have not described each meeting; however, the agenda in Appendix I outlines all of my contacts during the visit. The staff members were enthusiastic about the museum's potential and candid about their evaluation of its needs. Their devotion and energy will be a major factor in ensuring that the museum's ambitious goals will be successful.

Approximately 115 or 15% of accredited museums are university museums, so it is a high honor, indeed. Achieving accreditation fits with the museum's goal of meeting professional standards that position it as an integral component of a top-tier research university. A number of the recommendations in this report have already been initiated by the museum, thus the report validates steps that are being taken. Further resources to assist in these are in Appendix III.

The museum has the capacity to achieve its goals. Its success will be measured in how well it meets its new mission and lives up to its core values of: integrity, excellence, inclusiveness, respect, collaboration, innovation, and stewardship.

Patricia L. Miller, MAP Consultant

APPENDICES

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APPENDIX III. RESOURCES

Museum Assessment Program

MAP Site Visit

Patricia Miller, Surveyor

Institute of Texan Cultures

June 1 – 4, 2010

June 1, 2010

- 11:50am Arrive in San Antonio
- 2:00pm Initial Interview with Tim Gette, Executive Director
- 3:00pm Tour of the Facility with Aaron Parks, Chief Operating Officer
- 4:30pm Wrap-up for Day 1

June 2, 2010

- 9:00am Meeting with Craig Stinson, Director of Advancement
- 10:00am Meeting with the ITC Library Team: Lupita Barrera, Yu “Lilly” Li, Tom Shelstad, Patrick Lemelle
- 12:30pm Lunch meeting with Advisory Board Executive Chair, Guy Bob Buschman. Eric Gentry, Asst. Vice President for Advancement, UTSA, Tim Gette, and Craig Stinson also attended
- 2:00pm Meeting with Jo Ann Andera, Director of Special Events
- 3:00pm Meeting with Dr. Bryan Howard, Director of Exhibits and Collections
- 4:00pm Meeting with Lupita Barrera, Director of Education and Interpretation
- 5:00pm Wrap-up for Day 2

June 3, 2010

- 9:00am Meet with the ITC Curatorial Team: Bryan Howard and Shellie Eagan, Curator
- 11:00am Meeting with Pat Gamez-Bryant, Business Operations Manager
- 12:00pm Lunch meeting with MAP Committee: Tim Gette, Aaron Parks, Craig Stinson, Bryan Howard, Lupita Barrera, Pat Gamez-Bryant, Mary Ellen Smith, Shellie Eagan, Jill Foster, Administrative Associate, Operations Department
- 2:00pm Meeting with Mary Ellen Smith, Director of Visitor Services
- 3:00pm Meeting with UTSA Facilities: Polo Cervantes, Joe Rubio, AVP Facilities; Paul Suttles, ITC Physical Plant Supervisor
- 4:00pm Wrap-up for Day 3

June 4, 2010

- 9:00am Meeting with UTSA/ITC Police: Asst. Chief Dan Pena, Capt. Doug Sonogo, and Guard Supervisor Ramiro Nino
- 10:00am Meeting with Dr. Jude Valdez, UTSA Vice President for Community Services (Governing Authority)
- 11:00am Meeting with Aaron Parks, Chief Operating Officer
- 11:30pm Exit Interview with Tim Gette and Aaron Parks
- 12:00pm Depart for Airport

Additional contacts:

Karen Sanchez, Visitor Services

Laura Ibera, Visitor Services Manager (Museum Store manager)

Joe Mirales, Carlos Martinez, Guards

Alana Malone, Collections Intern

Philip and Matthew Jenkins, Puppeteers, Jr. Docents

Carolyn Marez, Senior Administrative Assistant, Executive Director’s Office

RESOURCES

These are just a few books that are helpful for accreditation planning. I could recommend others for specific areas of interest.

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

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

Mastering Civic Engagement: A Challenge to Museums. Washington, DC: 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. (This is the book that was mentioned during the MAP team lunch. It is one of the most helpful resources for a museum preparing for accreditation.)

Bourchier, Paul, Ruby Rogers, and the Nomenclature Committee. *Nomenclature 3.0 for Museum Cataloging*. Latham: Altamira Press, 2010. (This is the long-awaited new edition. It is indispensable for cataloging. PastPerfect software has Nomenclature built-in, and version 5 will be out shortly, but the book is still helpful.)

Buck, Rebecca A., and Jean Allman Gilmore, eds. *Museum Registration Methods 5th Edition*. Washington, D.C., AAM Press, 2010. (This new edition is just out. It's a must for every collections management department. It includes a sample loan form, traveling exhibition form, and deed of gift form.)

Gardner, James B., and Elizabeth Merritt. *The AAM Guide to Collections Planning*. Washington, D.C.: American Association of Museums, 2004. (This book is a valuable asset in developing a collecting plan.)

Malaro, Marie C. *A Legal Primer on Managing Museum Collections*. 2nd ed. Washington, DC: Smithsonian Institution Press, 1998.

Weaver, Stephanie. *Creating Great Visitor Experiences: A Guide for Museums, Parks, Zoos, Gardens, and Libraries*. Walnut Creek: Left Coast Press, 2007.

PROFESSIONAL DEVELOPMENT

American Association of Museums (AAM). www.aam-us.org. The ITC is a member. Next year's conference is in Houston and offers an opportunity for the museum to send a large contingent.

There are thirteen Standing Professional Committees in AAM. Staff members might find these especially useful:

Curator's Committee (CurCom); Education Committee (EdCom); Registrar's Committee (RC-AAM); Committee on Museum Professional Training (COMPT). Information about the SPCs can be found at www.aam-us.org/aboutaam/councils/index.cfm. The museum might find the Association of Academic Museums and Galleries (AAMG) helpful. (Formerly the Association of

College and University Galleries (ACUMG). This organization is an Affiliate Professional Organization of the AAM. It can be found at <http://www.aamg-us.org/>. The Visitors Services Professional Interest Committee, affiliated with AAM also might be useful.

American Association for State and Local History (AASLH). www.aaslh.org/. The AASLH offers workshops and has an annual conference, this year in Oklahoma City, September 22-25.

American Association for Museum Volunteers. (AAMV). www.aamv.org/. An affiliate of the American Association of Museums.

American Law Institute-American Bar Association (ALI-ABA). www.ALI-ABA.org. The ALI-ABA offers an annual 2 ½ day conference on Legal Issues in Museum Administration. It is held in late March. Time and location are not yet determined for 2011. This is a very valuable learning opportunity and includes a thick manual on current issues. There now are opportunities to attend the conference online.

Museum Store Association (MSA). www.museumdistrict.com/. The ITC is a member and receives *Museum Store* magazine. The next conference and expo is in Chicago/Rosemont, April 30-May 2, 2011.

Mountain Plains Museum Association (NPMA). www.mpma.net/. The annual conference this year is in Mt.Rushmore/Rapid City, SD, September 13-17.

Texas Association of Museums (TAM). www.io.com/~tam/. The TAM offers numerous workshops and continuing education opportunities. The next annual conference will be in Irvng, August 4-6, 2011.

ONLINE RESOURCES All urls were accessed 6-18-10.

General

Online discussion groups are helpful. Some require membership. An open list is Museum-L.

Audiences

Visitor Studies Association www.visitorstudies.org

Interpretation

National Association for Interpretation Definitions Project.
www.definitionsproject.com/definitions/index/cfm

National Park Service. Teaching with Historic Places. www.nps.gov/history/nr/twhp

COLLECTIONS STEWARDSHIP

Canadian Conservation Institute. www.cci-icc.gc.ca. Short articles on conservation for sale.

National Park Service. Conserve-O-Grams.

www.nps.gov/history/museum/publications/conservoogram/conserv.html.

National Park Service. Museum Handbook. Parts 1-3.

www.nps.gov/museum/publications/handbook/html. Information on collections care.

Northeast Document Conservation Center. www.nedcc.org. Leaflets on care of paper-based collections, disaster planning.

Management

Blue Avocado Blog. www.blueavocado.org

Board Café. www.compasspoint.org/

Independent Sector. www.independentsector.org

Disaster Planning

Heritage Preservation has links to other resources. www.heritagepreservation.org

The Illinois Heritage Association has a five-page list of online disaster planning resources. Contact plm@illinoisheritage.org.

Smithsonian Affiliations

Consider joining the Smithsonian Affiliations Program – a good source for resources, including the Visiting Professionals Program for staff training, and for the ability to use the Smithsonian logo on marketing materials – very helpful in attracting visitors (information available on: <http://affiliations.si.edu/>)

Membership

“29 Ways to Get and Keep More Members,” Dana Hines found on Web site, Museum Marketing Tips, www.Museummarketingtips.com

“An Evaluation Tool for Membership Programs” Fact Sheet from AAM Information Center, www.aam-us.org

Fund Raising

Panas, Jerold, *Fundraising Habits of Supremely Successful Boards: The A 59-Minute Guide to Assuring Your Organization's Future*, 2006.

Schaff, Terry and Doug, *Fundraising Planner (The): A Working Model for Raising the Dollars You Need*, 1999.

Martin, Patricia, *Made Possible By: Succeeding With Sponsorship*, 2004.

Writing a Collections Management Policy

The AAM Information Center offers a Fact Sheet (PDF) that outlines the typical components of a museum collections management policy.

Museum News presents an article that offers advice on crafting a collections management policy. http://www.aam-us.org/pubs/mn/MN_JF04_ManagingThings.cfm

The Smithsonian Institution offers an online manual for Developing a Collections Management Policy (<http://siarchives.si.edu/collections/cmp.html>). It notes that museums are so varied that there is no single model collections management policy. There are, however, common issues that all institutions should consider; these are listed in the Components section of the manual. http://siarchives.si.edu/collections/cmp_function.html

Emergency Preparedness Plan/Disaster Plan

The Heritage Emergency National Task Force has prepared an *Emergency Response and Salvage Wheel* that offers basic guidance on preparing for disasters, and for treatment of various materials. It can be ordered on-line at www.heritagepreservation.org/programs/taskfer.htm. The Northeast Document Conservation Center with the Massachusetts Board of Library Commissioners has created a free, on-line template that will allow the Society to create a more detailed disaster plan. It is available at www.dPlan.org.

Dorge, Valerie and Sharon L. Jones. *Building an Emergency Plan: A Guide for Museums and Other Cultural Institutions*. The Getty Conservation Institute, 1999.

Heritage Preservation, National Task Force on Emergency Response. *The Emergency Response and Salvage Wheel*. 1997.

Liston, David, ed. *Museum Security and Protection: A Handbook for Cultural Heritage*. International Council of Museums, Routledge. 1993.

Lord, Allyn, Carolyn Reno, and Marie Demeroukas. *Steal This Handbook! A Template For Creating a Museum's Emergency Preparedness Plan*. Southeastern Registrars Association, Columbia: 1996.

The Minnesota Historical Society offers a technical leaflet to assist small museums in developing a risk management program (PDF). It includes checklists with essential elements for 8 program areas, including insurance, guards, fire protection, security, and locks & keys.
<http://www.mnhs.org/about/publications/techtalk/TechTalkMarch2000.PDF>

The Nonprofit Risk Management Center has an online risk assessment tool; the 9 modules focus on an introduction to risk management, employment practices, contracts, special events, harm to clients, transportation, internal controls, technology, and facilities. In addition, it offers an online risk management tutorial. Through a series of exercises, the tutorial demonstrates how the principles of risk management can be integrated into day-to-day operations. The Resource Center offers a number of fact sheets on risk management, liability, and insurance. The Resource Center also provides free technical assistance to nonprofits.
<http://nonprofitrisk.org/tools/cares/cares.shtml>

The Risk Management Resource Center provides Risk Identification and Analysis: A Guide for Small Public Entities (PDF).
https://www.riskinstitute.org/peri/component?option=com_bookmarks/Itemid,44/catid,31/navstart,0/task/detail/mode,0/id,48/search,*/

The 79-page guide helps organizations evaluate risks and develop plans to control and mitigate them. The Center also has 2 online tutorials. Each includes several sample forms and checklists.
<http://collections.paleo.amnh.org/9/risk-management-and-disaster-planning>

UBIT Frequently Asked Questions

By Ian K. Portnoy and John Theberge

Adapted from an article originally published in the Summer 2000 issue of *Museum Store* magazine.

What is UBIT?

The "unrelated trades or businesses" of tax-exempt organizations such as museums are subject to a tax at the applicable corporate rate for tax-exempt corporations. In determining the amount of unrelated trade or business income that is subject to this tax, the Internal Revenue Code (the "Code") allows for deductions that are directly connected with the carrying on of the trade or business.

Section 513 of the Code defines "unrelated trade or business" as any trade or business, the conduct of which is not substantially related (aside from the need of such organization for income or funds or the use of the profits derived) to the exercise or performance by such organization of its charitable, educational or exempt purpose or function.

Are museum stores subject to UBIT?

If an exempt organization engages in a trade or business activity on a regular basis but such activity is in furtherance of its exempt purposes, such income is not subject to the unrelated trade or business income tax.

Can I sell anything in the store?

In 1973 the Internal Revenue Service issued two revenue rulings (Rev. Rul. 73-104 and Rev. Rul. 73-105) concerning the unrelated trade or business consequences on the sales of various items at stores operated by art museums. These revenue rulings indicate that if the nature of items being sold at museum stores relates specifically to the educational purposes of the museums in which they are sold, the sales will be considered "related" and, thus, not generate unrelated trade or business income. These revenue rulings conclude that the proceeds generated from the sale of greeting cards with reproductions of objects in the museum's collection would be related and that the sale of reproductions of art works found in the collection and in the collection of other art museums are related to the art museum's exempt purposes. One of the rulings also concludes that the sale of instructional literature concerning the history and development of art would be related to the museum's exempt purposes but that the sale of scientific books and souvenir items relating to the city where the museum is located does not promote art appreciation and, thus, would be unrelated to the museum's exempt purposes.

When the primary-purpose behind the sale of an item is utilitarian, ornamental or as a souvenir, or only generally educational, it should be considered unrelated to the museum's exempt purposes.

These memorandums indicate that Internal Revenue Service personnel will look at the degree of connection between the item and the museum's collection; the extent to which the item relates to the form and design of the original; and the size, location and accuracy of the reproduction.

How do I know if selling a particular item will be subject to UBIT?

The Code provides three criteria for determining whether income is subject to the unrelated trade or business income tax:

1. The activity constitutes a trade or business;
2. The activity is "regularly carried on" by the organization; and
3. The conduct of the activity is "not substantially related" to the performance of the organization's exempt function.

The regulations further provide that where the production or distribution of goods does not contribute importantly to the accomplishment of the exempt purposes of the exempt organization, the income from that activity would be subject to the unrelated trade or business income tax.

© 2000 Portnoy and Theberge. Ian K. Portnoy and John Theberge are partners at Long Aldridge & Norman, in Washington, DC, and represent not-for-profit corporations as part of their work involving technology, tax and corporate matters. They can be reached at (202) 624-1560.

Are there exceptions to UBIT?

Excerpts taken from *Tax Issues for Exempt Organizations* by Paula Cozzi Goedert

Volunteer activities. The Treasury Regulations make a special exception for activities if substantially all the work is done without compensation. This level of activity is not considered an unrelated business. For example, a charity thrift store run by volunteers was found not to be an unrelated business. A weekly dance run by a volunteer fire department was exempt from tax because all the work was done by volunteers. This was true even though the dances were regularly carried on and, obviously, unrelated to fire-fighting.

The volunteers must do "substantially all" of the work for the exception to apply. This means that the compensated labor can only constitute a small portion of the total work done for the activity. The Treasury Regulations limit the paid labor to 15% of the total labor.

Low-cost merchandise. The Internal Revenue Code exempts from unrelated business income tax any income from the distribution of low-cost articles incidental to the solicitation of charitable contributions. For example, many organizations send out return address stickers or pencils printed with the homeowner's name, along with a solicitation letter. An item is considered "low-cost" if it costs the organization less than \$5.00.

Donated merchandise. Another exemption from tax applies to the sale of donated items. If a tax-exempt organization resells items that have been donated to it, it does not have to pay tax on the profit.

This is true even if the resale activity is regularly carried on and unrelated to the organization's exempt purposes. The Internal Revenue Service has indicated that it will not apply the exception if the charity only receives a fee for sponsoring the thrift store, and a commercial company actually runs it.

"Substantially all" of the items sold must be donated. This would permit an organization, for example, to purchase and resell sweet rolls and coffee at a thrift shop and still come under the exemption.

© 2004 Paula Cozzi Goedert, Esq. Ms. Goedert is a lawyer with Jenner and Block in Chicago, IL, and regularly provides legal advice to MSA on UBIT and other nonprofit issues.

Characteristics of Excellence for U.S. Museums

Public Trust & Accountability

- The museum is a good steward of its resources held in the public trust.
- The museum identifies the communities it serves, and makes appropriate decisions in how it serves them.
- Regardless of its self-identified communities, the museum strives to be a good neighbor in its geographic area.
- The museum strives to be inclusive and offers opportunities for diverse participation.
- The museum asserts its public service role and places education at the center of that role.
- The museum demonstrates a commitment to providing the public with physical and intellectual access to the museum and its resources.
- The museum is committed to public accountability and is transparent in its mission and its operations.
- The museum complies with local, state, and federal laws, codes, and regulations applicable to its facilities, operations, and administration.

Mission & Planning

- The museum has a clear understanding of its mission and communicates why it exists and who benefits as a result of its efforts.
- All aspects of the museum's operations are integrated and focused on meeting its mission.
- The museum's governing authority and staff think and act strategically to acquire, develop, and allocate resources to advance the mission of the museum.
- The museum engages in ongoing and reflective institutional planning that includes involvement of its audiences and community.
- The museum establishes measures of success and uses them to evaluate and adjust its activities.

Leadership & Organizational Structure

- The governance, staff, and volunteer structures and processes effectively advance the museum's mission.
- The governing authority, staff, and volunteers have a clear and shared understanding of their roles and responsibilities.
- The governing authority, staff, and volunteers legally, ethically, and effectively carry out their responsibilities.
- The composition, qualifications, and diversity of the museum's leadership, staff, and volunteers enable it to carry out the museum's mission and goals.
- There is a clear and formal division of responsibilities between the governing authority and any group that supports the museum, whether separately incorporated or operating within the museum or its parent organization.

Collections Stewardship

- The museum owns, exhibits, or uses collections that are appropriate to its mission.
- The museum legally, ethically, and effectively manages, documents, cares for, and uses the collections.
- The museum's collections-related research is conducted according to appropriate scholarly standards.
- The museum strategically plans for the use and development of its collections.
- Guided by its mission, the museum provides public access to its collections while ensuring their preservation.

Education & Interpretation

- The museum clearly states its overall educational goals, philosophy, and messages, and demonstrates that its activities are in alignment with them.
- The museum understands the characteristics and needs of its existing and potential audiences and uses this understanding to inform its interpretation.
- The museum's interpretive content is based on appropriate research.
- Museums conducting primary research do so according to scholarly standards.
- The museum uses techniques, technologies, and methods appropriate to its educational goals, content, audiences, and resources.
- The museum presents accurate and appropriate content for each of its audiences.
- The museum demonstrates consistent high quality in its interpretive activities.
- The museum assesses the effectiveness of its interpretive activities and uses those results to plan and improve its activities.

Financial Stability

- The museum legally, ethically, and responsibly acquires, manages, and allocates its financial resources in a way that advances its mission.
- The museum operates in a fiscally responsible manner that promotes its long-term sustainability.

Facilities & Risk Management

- The museum allocates its space and uses its facilities to meet the needs of the collections, audience, and staff.
- The museum has appropriate measures to ensure the safety and security of people, its collections and/or objects, and the facilities it owns or uses.
- The museum has an effective program for the care and long-term maintenance of its facilities.
- The museum is clean and well-maintained, and provides for the visitors' needs.
- The museum takes appropriate measures to protect itself against potential risk and loss