

**Collections Management Assessment Report
Museum Assessment Program
American Association of Museums**

**Pierre Museum and Visitor Center
Office of Historic Resources
Pierre, OH**

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This sample report from the Museum Assessment Program is based on a real museum. The report is a good example of the challenges typical of many museums participating in the MAP program. All of the names of the staff, board members, museum, town, buildings, as well as the Surveyor, have been changed.

Executive Summary

The Pierre Museum and Visitor Center is an established institution offering a wide array of exhibitions and programs to its constituents and out-of-town visitors. Selections from the museum's historic collections are featured in exhibitions and often used in programs. These include archaeological artifacts, historic photographs, manuscripts, textiles, furniture, and other objects dating from prehistoric times to the twenty-first century. Since 2000, the museum has operated under the auspices of the Office of Historic Resources, City of Pierre. City staff manages the Museum and Visitor Center along with two additional properties, the Langley-French House and Charlotte Estate. Prior to the establishment of the Office of Historic Resources, the Pierre Museum and Visitor Center along with the Langley-French House were managed and staffed by Historic Pierre City, Inc (HPCI). Incorporated in 1983, HPCI is chartered by the City of Pierre as an advisory preservation organization. Today, HPCI serves as an advisory board for City Council and staff. The collections committee of HPCI reviews all acquisitions and collections management initiatives.

The main purpose of this report is to give the staff, governing authority, and HPCI board members guidance in establishing, improving, and maintaining policies and procedures pertaining to the care, interpretation, and preservation of the Pierre Museum's permanent collection. The report should also be used as a tool to prioritize goals for the care and preservation of the collections based on current and future budgets and staff resources.

Introduction

This report summarizes the findings of my review of the Pierre Museum and Visitor Center for the American Association of Museum's Museum Assessment Program's Collections Management Assessment. Observations and recommendations included in this report were made based on a review of written materials provided by the museum and a site visit. Documents studied by the surveyor included the completed *Self Study Workbook*, a first draft of a Historic Collections Policy and Management Plan, various collections forms used by staff, accession numbering procedures, HPCI board training materials, opening and closing procedures, a completed copy of the American Association of Museum's *Standard Facility Report*, an outline of proposed emergency procedures and disaster preparedness plan for the museum's historic buildings and collections, and a 1997 Institutional MAP Assessment Report. Various brochures, newsletters, and web sites associated with Pierre City, Pierre County, and HPCI were also consulted.

I conducted a site visit on February 16. During the site visit, I met individually with Elisa Wright, Curator/Visitor Services Manager and as a group with Ms. Wright, the Director of Historic Resources Peter Easton, Ph.D., and part-time Museum Technicians Carolyn Simons, Leslie Dillon, and Alex Homer. During these two meetings, I learned about the daily duties of each staff member and received input from each of them about what knowledge they would like to gain from the assessment report.

Following the meetings, I toured the museum's permanent exhibition *The Pierre Story* and the temporary exhibition *Housing Suburbia*, both on view in the Pierre Museum and Visitor Center building. Following the tour, a meeting was held with the following members of the HPCI board, Glenda Brown, former President of HPCI who was instrumental in the founding of the Pierre Museum and oversaw the day to day operation of the museum before the hiring of staff; Linda Garland, President of HPCI; Matthew Hines, HPCI board member; and Marianne Broderick, HPCI board member and chair of the Collections Review Committee. Staff members Elisa Wright, Peter Easton, Carolyn Simons, and Leslie Dillon were also present at this meeting. During this session, I gained a better understanding of both the advisory role HPCI plays in the museum's operation and the financial support HPCI provides to the museum.

After lunch, I toured the museum's other two properties, the Langley-French House and Charlotte Estate as well as the three off-site collections storage facilities. Lastly, I met the curator in the staff workspace where we reviewed various collections documentation files, the collections database, and the contents of the archival storage closet.

Overview of the Museum

Historic Pierre City, Inc. (HPCI) was incorporated in 1983 as an advisory preservation organization for the City of Pierre. The organization using an annual appropriation from the City along with privately raised funds supervised the renovation of the former Pierre Elementary School into a museum and visitor center. HPCI operated the facility from July 1992 until February 2000. From 1993 until 1998, HPCI employed one full-time Director who was the only salaried staff member. From May 1998 to February 2000, part-time employees oversaw the management of the museum and visitor center. HPCI

also oversaw the restoration of the Langley-French House. The house operated as an historic house museum with volunteer staff from September 1998 until February 2000.

In January 1999, the City of Pierre purchased the twelve-acre Charlotte Estate. In February 2000 the City of Pierre established the Office of Historic Resources (OHR) under the direction of the City Manager's department. The OHR assumed management of the three historic properties as well as the historic oversight of Old Town Hall. The OHR staff is composed of a full time Director of Historic Resources, a full time Curator/Visitor Services Manager and three part-time Museum Technicians (two twenty-four-hour-a-week and one thirty-hour-a-week positions). In addition to managing and operating the Museum and Visitor Center and the two other historic properties, staff coordinates city special events, develops and oversees educational programming, fulfills informational requests, operates the gift shop, and coordinates a forty-member volunteer staff. Salaried staff is also involved in planning fundraisers and recently managed a capital campaign. The management of the city's archaeological program also falls under the OHR. Currently, OHR staff is also overseeing the restoration of Charlotte Estate and the planning and construction of a 3,500 square foot interpretive center on the grounds of the estate.

After the establishment of OHR, HPCI was designated as an advisory board for City Council and City staff. A collections committee under the auspices of HPCI reviews all acquisitions and collections management initiatives. In addition, HPCI maintains a membership program, sponsors special events and walking tours and publishes a quarterly newsletter. In addition to providing funding for special projects and exhibitions, the HPCI board also maintains an account for museum acquisitions.

The museum currently owns approximately 1,100 artifacts, 2,800 objects that can be classified as archival, and several hundred reproductions and objects designated as teaching materials. Museum staff also oversees the curation of the city's archaeological collection currently consisting of forty-two boxes of materials. Before OHR took over the management of the historical collections, each site had a separate collection. After the integration of museum operations under OHR, all the collections were merged into the "City of Pierre Historic Collections."

Highlights of the historic collection include a Native American projectile point, the first court record box used by the Pierre County Court, articles and tools used by early nineteenth century craftsmen, Civil War period manuscripts, agricultural implements, records for the incorporation of the Town of Pierre to the City of Pierre in 1961, and contemporary ephemera illustrating the city's growing ethnic population. Artifacts and archival material relating to each historic property are also included in the historic collection. Examples include archival materials associated with Dr. June Cooper Hall, who owned the Langley-French House in the 1920s and was a nationally prominent social activist and suffrage leader, and furnishings belonging to Lucy Hall McCann, the last private owner of the Langley-French House.

In 2005, *The Pierre Story*, a permanent exhibition on the history of the City of Pierre opened on the second floor of the Museum and Visitor Center. The exhibition utilizes artifacts and archives from the museum's permanent collection. Borrowed material is also utilized in the exhibition. Three temporary exhibitions were on view during the surveyor's visit. *Valentine Be Mine* (February 2-28, 2007) and *Housing Suburbia* (April 30, 2005 – September 2007) were on view on the first floor of the Pierre Museum and Visitor Center and *Lucy Hall McCann: A Joyful Gardener* (July 4, 2006 – 2008) was on view at the Langley-French House.

The main goals for this Assessment as identified by staff and HPCI board members in their MAP application and Self-Study are to:

- Use the report as a tool to be made available to the Governing Authority to show the Museum's needs, especially the need for more staff.
- Provide a clear assessment of the collections management needs and give suggestions for educating others so as to gain additional financial support.
- Provide constructive criticism, give practical advice that can be used immediately and assist with mapping out future goals.
- Give guidance, advice and ideas for better management of the collection and some problem solving ideas for managing the lack of dedicated collections storage space.
- Furnish guidelines for exhibiting and storing historic collections and maximizing the effectiveness of the museum's collections management program.

Other concerns raised by the assessment team in their application materials and during the site visit include; understaffing, lack of an adequate and secure workspace, a large backlog of collections to catalog, a number of undocumented artifacts in the collection, assistance with establishing deaccessioning policies and procedures, and a need for greater support from the City of Pierre and the community, especially in regards to marketing and public relations.

This MAP report will address these concerns. The two main issues I identified that need to be addressed and that impact most of the concerns and goals above are:

- A shortage of staff to carry out collections management duties including inventorying and cataloging collections, housing artifacts and archival materials, cleaning artifacts, providing basic conservation treatments, environmental and pest monitoring, and updating collections policies and procedures.
- An inadequate amount of physical space for archival and artifact storage, research, and exhibition preparation.

By addressing these issues in the following pages, I hope that the staff, governing authority and advisory committee of the Pierre Museum and Visitor Center will be able to gain a clearer idea of short-term and long-term goals needed for the management of their collections. This report along with the accompanying resource notebook should provide the framework to formulate and implement short-, medium- and long-term goals that will not only address specific needs but will also have a favorable impact on the Pierre Museum's future operations.

Review of Major Areas of Operation

A. Mission and Planning

1. Mission

HPCI adopted a mission statement for the Pierre Museum and Visitor Center in 1998. The governing authority and the staff of OHR utilize the same statement to guide the collecting mission of the organization. The central purpose of the Pierre Museum as outlined in the original mission statement is to “collect, preserve, exhibit, and interpret the history of the City of Pierre and Southern Ohio.” The statement concludes with describing the geographic area that is the museum’s focal point.

A more extensive “working” mission statement that has been under review by the museum staff and the collections committee since 2001 more thoroughly outlines the collecting and interpretation focus, identifies the audience served, and lists several methods the institution uses to educate the public. The mission also includes the Visitor Center component of the organization identifying it as “a repository of area tourist information.” This mission also expands the physical boundaries of interpretation to include a more regional rather than a localized geographic area.

“Working” mission statements have also been developed for the Langley-French House and Charlotte Estate targeting the specific histories and interpretive themes for both sites. However, the assessment team points out that it is the Pierre Museum and Visitor Center’s mission statement that covers the collecting components of acquiring, preserving and interpreting a range of artifacts and archival material related to the broader context of Pierre and Ohio history.

While it is wise to outline the unique interpretive themes of the Langley-French House and the Charlotte Estate in separate statements, the “working” mission statement of the Pierre Museum and Visitor Center presents the broadest collecting focus and interpretive themes within the regional history context. This mission statement should remain at the forefront of the museum’s focus especially since there is now a centralized staff and the collections of all three sites have merged into one collection. To further solidify the museum’s management and operation of all three sites, it may be beneficial to adopt the Pierre Museum and Visitor Center’s mission statement, adding on several sentences concerning the interpretive parameters of the two other sites. Adopting one cohesive mission statement that encompasses all of the facilities will give present and future staff, members of HPCI, and the city’s governing authority the broader picture of collecting and interpretive parameters for the entire system.

The Pierre Museum’s permanent collection appears to support the mission with the exception of a few artifacts cited in the *Self-Study* that were accepted in the formative years of the Museum. The permanent exhibition does an excellent job of illustrating the core mission of the museum by utilizing key artifacts and visuals to tell Pierre’s history.

While some policies and procedures have been developed in support of the mission, the staff acknowledges that others need to be written and adopted to further fulfill the mission, especially in regards to collections management. By completing the MAP process, the staff and advisory board should be able to further develop and strengthen the collections and collections policies and procedures to mirror the institution's core mission statement.

2. Planning

Currently, the OHR does not have a strategic or long-range plan. However, the Museum does formulate planning goals and initiatives on a semi-annual basis as directed by City Council. The most recent comprehensive plan adopted by the City Council in 2004 includes general goals, objectives, and strategies for the Office of Historic Resources. Strategies listed that most directly affect the Museum include; HR-1.2 Promote a greater awareness of the City's historic resources; HR-1.11 Stabilize the Charlotte Estate and complete its rehabilitation as a key City historic site; HR-1-12 Inventory City museum collections and ensure their conservation; and HR-1.13 Contribute to the City's tourism initiatives. Since these goals are very general, it may be helpful to staff to further break down the initiatives into short-, medium-, and long-term goals. This would assist the staff into achieving measurable results that could be reported back to City Council. For example, a goal of inventorying and cataloging one-third of the permanent collection in one year and identifying conservation priorities within that portion of the collection may be a more manageable goal.

The staff and HPCI should also establish new goals on an annual basis and should be working towards developing a five- to ten-year long-range plan specific to the Office of Historic Resources. Topics covered in the plan should include exhibitions, other programming and interpretive initiatives, marketing and public relations plans, and capital improvement projects. Goals regarding collections use, care, and development should also be included in the plan.

A first draft of the *City of Pierre Policy and Management Plan* has been written. The majority of the topics covered in the plan are consistent with topics found in standard museum collections management policies. The document should be renamed the *City of Pierre Collections Management Policy*. A separate Collections Plan should be drafted.

The current draft of the *Policy and Management Plan* contains an excellent outline of collecting themes that should be included in the Collections Plan. These are identified as:

- General history, growth, and development of Pierre County
- General history, growth, and development of the Town of Pierre.
- Specific subject themes: The Pierre Family, the Civil War, Pierre County Schools, Agriculture, Suburban Development, the City of Pierre (1961-ongoing), Langley, Bauer, and Ward families, specific Pierre personalities, Contemporary Life/Ethnic Diversity
- Leading families, major personalities, and events of Pierre history

Broad historic themes have also been identified and are currently covered in the permanent exhibition. These themes offer an excellent method of establishing a specific collecting framework for the institution and should remain as a tool for the staff, governing authority and advisory board to use to further focus on collecting goals.

The themes include:

- **The Beginnings:** Pre-history/Native American Life, Early Explorers and Interaction between Native American and European settlers.
- **Colonial Heritage:** Fur Trade, French and Indian War, Northwest Ordinance
- **Building A Town:** Completion of the county courthouse, development of transportation routes, trade and commerce, achieving statehood
- **Crossroads of War:** Enlistment, free blacks in the Union army, birthplace of Ulysses S. Grant, effect on trade with southern states
- **Economic and Community Change:** : Industrialization, agriculture/dairying, new modes of transportation (trolley and automobile), new organizations (fire/police/women's clubs)
- **City and Suburb:** Change from a town to a city, explosion of suburbs, new cultural venues and community special events, new schools
- **New Century: New Faces and New Facades:** Growing diversity of the population, historic preservation, downtown redevelopment, heritage pride

The Collections Plan should identify how the staff, governing authority, and the advisory committee envision using the collections to cater to their audience's needs. Examples should be given on how the collections fulfill research, exhibition, and programming needs. A Collections Plan should also assist in determining when a given collecting category is full. Lastly the Plan should acknowledge the resource constraints of the institution and outline what the museum is capable of acquiring and caring for given the financial, personnel, and physical constraints. A copy of a sample Collections Plan as well as an outline for a Collections Plan is included in the resource notebook.

Recommendations:

- **Rewrite mission statement based on current "working" mission statement of the Pierre Museum and Visitor Center.**
- **Include in the mission statement several sentences on the interpretive parameters of the Langley-French House and Charlotte Estate.**
- **Have City Council and HPCI officially endorse the new mission statement.**
- **Further break down initiatives in City Council's most recent comprehensive plan into more manageable goals.**
- **Establish new goals annually.**
- **Develop a five- to ten-year long-range plan to include exhibitions, programming, marketing and public relations, capital improvement projects and collections use, care, and development goals.**

- **Draft a collecting plan separate from the collections policy incorporating current collecting and historic themes and adding how collection fulfills research, exhibition, and programming needs, determining when a collecting category is full, and acknowledging current resource constraints.**

B. Interpretation

1. Audiences and Visitors

In the *Self-Study Workbook*, the Museum's general target audience was cited as being adults and youth who are either residing in the greater Pierre area or are out-of-town visitors. More specific audiences identified include adult retirees enrolled in "Learning in Retirement" programs at nearby Wright State University, HPCI members, members of other local and regional history groups, public and private school fourth through sixth grade students, Boy Scouts, and Girl Scouts.

The staff does an excellent job of catering to the specific needs of several of these audiences. Specific Standards of Learning based programming has been developed for area fourth through sixth grade students. Programs have also been developed to meet merit badge requirements for Boy and Girl Scout troops. Citywide special events planned and marketed by OHR staff often include exhibitions, tours, lectures, and/or themed programs aimed at one or more of the targeted audiences. All of these initiatives strengthened links between the Museum and potential donors and lenders resulting in additional donations and loans.

Potential audiences identified by the assessment team are secondary school students, new residents, and ethnic groups who represent the city and region's contemporary demographics. Gardening enthusiasts were also identified as another potential audience due to the fact that the collection contains over sixty gardening and horticultural books and pamphlets spanning the years 1930 through 1970.

Utilizing other areas of the permanent collection for special exhibitions and programs should have the same effect. For example more exhibitions and programs related to the interests of the current ethnic population would bring in a more diverse set of visitors. Printing and circulating a brochure or rack card outlining the major collecting themes and information about the permanent exhibition would also attract additional audiences. Continuing to cull information from the current Visitor Log and conducting surveys during special programs and events should also assist the staff with further identifying the special needs of its audiences.

2. Community

The Pierre Museum and Visitor Center serves as a repository for the community's heritage and through exhibitions and programs communicates this heritage to local and regional citizens. The city's history is effectively told in the permanent exhibition utilizing artifacts and archival material from the collection. The Museum and Visitor

Center also provides information, leisure activities, and a retail venue to both residents and out of town visitors. Awareness by the community will hopefully increase with the opening of the Langley-French House on a more regular basis and the opening of Charlotte Estate and that site's new interpretive center.

Certain community groups are active and supportive of the Museum, including members of HPCI and other local and regional history groups. Demographics for future exhibitions and programs that could be targeted include Asians, African Americans, Hispanics, and Native Americans. Developing and circulating a brochure or rack card highlighting the collection, increasing advertising utilizing key artifacts from the collection, and a larger presence on the Internet would not only make the community more aware of the Museum and its unique collections but should also cull additional donors and lenders.

3. Public Programs

In the past several years, the Museum has sponsored illustrated talks utilizing images of photographs, manuscripts, and three-dimensional objects from the collection. Collections are also used as complementing graphics for themed walking tours. Reproductions of objects found in the collection allow hands-on programs for school and youth groups.

The Second Sunday lecture series also periodically utilizes a theme from the collection for lectures, panels, and roundtable discussions. Special programming is also tied to themed months for example, a Women's History Day was held on March 24 for women's history month. The special event featured a living history presentation, gallery scavenger hunts, hands-on activities, and a walking tour.

4. Exhibitions

The Pierre Story, the Museum's permanent exhibition effectively utilizes the collection to tell the history of the City of Pierre from prehistoric times to the present. Each theme of the exhibition features artifacts and/or archival material to interpret a specific era. Additional exhibitions highlighting more specific facets of Pierre's history are on view in the Museum and Visitor Center's first floor hallway and first floor gallery space. Special exhibitions are also mounted in the 1927 era parlor in the Langley-French House. The new interpretive center at Charlotte Estate will also feature exhibition space.

The Museum has an ambitious exhibition schedule relative to its small staff size. The exhibition budget is also one of the larger line items in the overall OHR budget. It is understandable that the staff and the advisory board feel that new exhibitions are necessary to bring in repeat visitors, however, a closer look is warranted on if the frequency of new exhibitions comes at the price of less financial and staff resources for the care and maintenance of the collection.

Hosting traveling exhibitions with broader historical interpretive themes may relieve some of the burden placed on staff to plan and mount in-house exhibitions. Some space within the traveling exhibition could be devoted to Pierre history relating to the traveling exhibit's subject matter. For example, an exhibition on the history of gardens or

gardening could include a case of materials from the Pierre Museum's archival collection.

Guest curators could also be recruited from local colleges and universities to assist with planning and writing exhibition scripts. Oftentimes professors and graduate students are researching and publishing papers and books that are relevant to local history. Collaborating with neighboring museums and other historical organizations is also a way to alleviate some of the financial and staff burden. In 2000, the Museum partnered with the Pierre County Park Authority, Pierre County Circuit Court Archives, and the Pierre County Public Library to develop an exhibition commemorating the bicentennial of the Pierre County Courthouse.

Both the Pierre Museum and HPCI should research and apply for grants to offset exhibition costs. The Curator did mention that she was applying to the Ohio Foundation of Humanities for a grant for an upcoming project. A notebook containing information on potential foundations, local businesses, corporations, and other funding agencies should be compiled. Some potential funding sources are included in the resource notebook.

5. Research

The Museum's collection provides a vast amount of primary source material relating to the history of the City of Pierre. Collections-based research has been the subject of numerous elementary and secondary school projects and presentations, scholarly talks, college level research papers and presentations, and newspaper magazines and articles. However, the assessment team cited several limitations that hamper regular access to the collections by students, scholars, and other researchers. Obstacles include a lack of a complete inventory of the collections, the storage of the collections in crowded and dispersed locations, conservation needs of the collection, a lack of space for researchers to work that also provides security for the collections, and limited staff time to answer researcher's inquiries.

Continuing to work on inventorying and cataloging the collections in the Museum's collections database will provide both staff and researchers with more information on the collections in a concise user-friendly format. Photographs of artifacts and scanned copies of historical images and archival material can also be added to the collections database, giving researchers access to the collections while limiting access to original artifacts, historical photographs, and archival materials.

The Museum's collections management software also includes components that can be purchased that allow creation of online exhibitions and posting of portions of the catalog records along with images directly to the Internet. Providing Internet access to even initially a small portion of the collections would give the general public, researchers, and students more access to the collections. Elementary and secondary students especially would be able to utilize the collections more frequently for school projects if they had access to online material.

Having a secure dedicated area for researchers to work would also improve access and utilization of the collections. Perhaps space, even a table in one of the proposed office spaces in the new interpretive center could be designated for researchers. If more space becomes available in the staff workspace in the Museum and Visitor Center after the construction of the Interpretive Center, a table could be reserved there for researcher use.

Policies for allowing researchers access to the collections are included in Section XIII of the first draft of the Historic Collections Policy and Management Plan. The policy states that research requests will be reviewed on an individual basis and access to the collections will be granted at the discretion of the Curator and/or Director. Procedures should be written to complement the policy to include a list of personal belongings permitted or banned from the room where research is being conducted (purses, backpacks, camera phones, ink pens, binders, and notebooks), the handling and documenting of artifacts (when white gloves are required, note taking in pencil vs. ink, when laptops are permitted) and forms that need to be completed before permission is granted to photograph or scan portions of the collection. Set fees should also be established for duplicating photographs and historic documents.

6. Publications

Currently, the Museum does not have any publications that utilize material from the collections aside from a column in the quarterly HPCI newsletter. Producing publications and associated materials highlighting the collections would bring more public awareness and further strengthen the Museum's ties to the community. Several publishing companies utilize local history collections in books marketed to the general public. While writing and publishing the book requires several months of staff commitment, the long-term benefit would be great. Proceeds from the book could be used for collections care. Other materials that could be developed and sold include an annual calendar and postcards and note cards featuring historic images,

The addition of a column highlighting the collections in the HPCI newsletter is helpful. Hopefully in the future more space can be devoted in the newsletter to new acquisitions and research utilizing collections materials. Perhaps one newsletter a year could be devoted to the Museum's collections and programs.

7. Marketing and Public Relations

Aside from utilizing exhibitions and public programs as marketing vehicles for the Museum, there is no formal public relations plan or advertising campaign for the institution. While the HPCI brochure includes a paragraph about each site and a map, hours and admission fees are not included. The *Self-Study Workbook* indicates that both a Museum brochure and a rack card are forthcoming. Designing and printing a series of brochures specifically on the collections would also be an informative and educational tool for the public. The initial brochure could be a companion to the permanent exhibition and could serve both as advertising for the exhibition, as well as include some interpretive material from the exhibition that visitors could take home with them. Other brochures could highlight photographs in the collection, three-dimensional artifacts, and

Civil War material. The brochures could also be available as PDF files on the Museum's web site.

Currently, HPCI board members serve as public relations advocates for the Museum. By being active in other community organizations and spreading news about exhibitions and public programs through word of mouth, the board is reaching other members of the community. HPCI may want to consider forming a public relations committee to further assist the Museum with advertising and marketing efforts. HPCI and Museum staff should also look into applying for the Museum Assessment Program's Public Dimension Assessment. Findings from the Public Dimension Assessment would be helpful in formulating future advertising, marketing, and public relations strategies.

Recommendations

- **Continue to develop new programs especially geared towards reaching more ethnically diverse audiences.**
- **Expand exhibition opportunities by utilizing traveling exhibitions, guest curators, and/or collaboration with other institutions.**
- **Research and apply for grants to offset exhibition costs. Compile a notebook of potential funding sources.**
- **Explore upgrading the collections management database to include online features.**
- **Establish dedicated researcher work space.**
- **Write procedures for researchers and set duplication fees.**
- **Consider publishing a book on a local history theme.**
- **Develop additional materials for sale and promotion utilizing portions of the collection.**
- **Increase amount of space in HPCI newsletter devoted to the collections.**
- **Design and print a series of brochures highlighting the permanent exhibition and/or different facets of the collection.**
- **Form a public relations committee utilizing HPCI board members.**
- **Apply for a Museum Assessment Program Public Dimension Assessment.**

C. Collections Stewardship

1. Scope of the Collections

The artifact collections in the Pierre Museum consist of 900 original historic objects with documented provenance related to Pierre and/or regional Ohio history. An additional 200 artifacts are classified as historic materials representing the general history, growth and development of the Pierre area even though the provenance of the artifacts cannot be tied to a specific Pierre family. The Museum's archival collection numbers approximately 2800 documents, photographic, and audio-visual materials

pertaining to the history of Pierre. Citywide archaeological surveys also make up several thousand items in the Museum's collection.

The staff is aware of a number of collections that are not relevant to the Museum's mission. Many of these objects were accepted by the Museum during its first years of operation by volunteers. A major portion of the collection was formed by a bequest from the last private owner of the Langley-French House.

With the initial development of collecting plans, the current staff has identified more specialized and targeted collecting themes. These themes are directly related to the Museum's mission. A formally adopted collecting plan incorporating these themes should be developed to guide the advisory board and staff on the content of future acquisitions. As an institution with a finite amount of resources and staff to catalog and care for collections, having a collections plan in place to establish a framework for future collecting activities would further define the relationship between the collections and the Museum's mission.

2. Collections Management

A *Historic Collections Policy and Management Plan* has been drafted by the Curator. This policy will replace an earlier policy that was approved in 1996. To distinguish this document from a future Collections Plan, it is recommended that the title clearly indicate this as a collections management policy rather than a collections plan. The draft policy covers basic museum functions such as providing a general statement of purpose and mission statement, defining a scope of collections, outlining acquisition policy and procedures, discussing deaccessioning protocol and criteria, outlining inventory policies, defining staff ethics, stipulating who has access to the collections, and providing a statement on rights and reproductions. Other topics that appear to have been included in a later edition of the draft policy include loans, temporary custody of objects, providing an annual review on the status of the collections to HPCI, and care of the collections. The two draft documents along with updated policies should be melded into one document and approved by HPCI and City Council as soon as is practical.

A separate *Procedures Manual for Collections Management* was drafted in 1997. This manual should be updated and any procedures covered in the collections management policy should be transferred to this document. While collections policies are meant to provide a framework for the staff, governing authority, and advisory board to follow for acquiring and caring for the permanent collection, procedures serve as a guide for staff and volunteers providing acceptable methods that need to be employed to carry out the day-to-day duties of maintaining, documenting, and preserving the collections.

The 2006/2007 line item budget for OHR provides \$5,200 for collections management. While this figure may be adequate for purchasing collections and archival supplies, additional funds are needed for conservation of collections and purchasing of appropriate storage fixtures. Grant funds may partially cover these expenses, however, most grants require a fifty percent match from the institution or an additional funding source. Decreasing the exhibition budget and increasing the collections budget by

\$5,000 would provide some much needed funding for conservation and re-housing projects. It should also be noted that OHR is spending \$11,500 a year on storage unit rental fees. While there may be considerable expense up front to obtain a permanent storage facility for the collection, the savings on rental fees would partially off set this expense.

The greatest hindrance for effectively managing the collection is the lack of a collections manager or registrar. The Curator/Visitor Services Manager is currently undertaking these duties in addition to her curatorial and visitor services tasks. These duties will continue to grow in the next several years as the Museum prepares to open a new interpretive center on the grounds of the Charlotte Estate. The Museum would greatly benefit by adding at least a part-time position devoted to the cataloging, care, and ongoing maintenance of the collection.

The Museum has made great strides in improving its management of the collections over the past three years. Some of the improvements cited in the *Self-Study Workbook* include improved environmental controls for objects on exhibit and in storage, the purchase of a collections management software database, the installation of a security system in the exhibit galleries, revisions of several collections management forms, and supervising university interns on various collections duties.

3. Acquisitions and Accessioning

Currently 75% of collections entering the Museum are accepted as gifts, 12% are added by purchase, and 13% are acquired by field collecting. Due to a lax acquisitions policy during the first few years of the Museum's operation, only 60% of the permanent collection has documented title. There is also a backlog of formally accessioning items in the collection. According to the *Self-Study*, only 18% of the collection has been accessioned. The staff has developed historical and collecting themes related to the Museum's mission. Hopefully these themes will be incorporated into a collections plan in the near future. The collections plan will provide a strong framework for future acquisitions.

The means of acquiring collections listed in the current policy are gift, bequest, purchase, exchange, field collecting, or any type of transaction by which full and unconditional title passes to the City of Pierre. A statement listing the required documentation needed to acquire title for each means would be a beneficial addition to the policy. A Deed of Gift form has already been developed for acquiring gifts for the Museum. For purchases, required documentation should include a receipt.

Policies for accepting bequests should also be more fully addressed. The staff and collections committee should determine the exact nature of the bequest and whether it is suitable for the Museum. Required documentation should include a copy of the will or the pertinent portion of the will. The policy should also state that the Museum may elect to take all of the items, none of the items, or a portion of the items offered in the bequest.

A Seller's Warranty should also be required on purchases over a set monetary amount. In addition to legitimizing the purchase, the Warranty may also state the dealer is responsible for reimbursing the museum for any fees involved if the title of the artifact is disputed at a later date.

Supporting documentation for exchanges may include appraisals, photographs, copies of the Deaccession Form for the object to be exchanged and information on the institution that is participating in the exchange. When artifacts are acquired by field collecting, the policy should state that all records associated with the objects be included in the acquisition. This could include survey forms, provenance catalogs, architectural drawings, cartographic records, photographs, and inventories.

Policies need to be developed for objects offered for acquisition by a member or relative of the Museum's staff, advisory board, or governing authority. The disclosure, discussion, and decision-making process for the acquisition needs to be documented. The policy should state that the board or staff member associated with the artifact should remove himself or herself from the discussion.

Appraisals and personal collecting are discussed in the Staff Ethics section of the policy. Additional ethical topics that should be mentioned include discouraging illicit trade, respecting and preserving natural and cultural resources, and a statement acknowledging that the Museum recognizes the unique nature of funerary remains and sacred objects.

Currently, the Museum's policy is to have all acquisitions authorized by a Collections Review Committee organized under the auspices of HPCI. The Collections Review Committee was formed before the Office of Historic Resources was established and before the hiring of professional museum staff. While it is advisable for the Collections Committee to be made aware of proposed acquisitions, it may be more prudent to shift the delegation of authority for accepting items into the collection to the Curator and/or Director. Since the Museum staff must wait for the Collections Committee to meet and vote on an acquisition, objects are left in temporary custody of the Museum for several months at a time. A more helpful solution would be to give the Director and Curator authority to accept items into the collection that can be purchased or are worth under a set monetary amount. Criteria for unique situations that would acquire a vote by the Collections Committee could be stipulated in the acquisitions policy. Circumstances warranting a vote by the Collections Committee could include potential acquisitions not consistent with the Museum's mission, donations with restrictions, potential collections that will result in a major future expense for the institution, and objects offered by museum staff or relatives of staff.

An accession numbering procedure is in place. Procedures for registering accessions into the permanent collection including objects found in the collections have also been developed. The accession process could be simplified for the Curator by utilizing several of the data fields and forms found in the *PastPerfect* collections software database. The database includes accession screens that include fields for source information and

physical descriptions of the items. Deed of Gift forms can also be customized and printed utilizing the software.

4. Deaccessioning and Disposal

Potential deaccessions have been identified, but to date no deaccessioning has taken place. One of the major barriers to deaccessioning is that the Museum does not have proof of title to many of the artifacts and the original depositors are unknown. Since the disposal of these items may present future legal risks, staff and the Collections Committee should weigh deaccessioning these items on a case by case basis. When establishing a policy for deaccessioning items without valid title, questions to ask should include; What is the value of the object in question? How common is the artifact (the more common, the more difficult it might be to establish ownership), what is the proposed method of disposal and how urgent is the need? Any deaccessioning of artifacts without valid title should follow the State of Ohio's recently enacted Abandoned Property and Unclaimed Loan legislation. Guidelines on this information can be found in the resource notebook.

The collections management policy does provide guidelines and criteria for deaccessioning and clearly states the chain of authority required in the decision-making process. A Deaccession Form should be developed to include the item name, original source, condition, reasons for deaccessioning, and method of disposal. The Director and the Chair of the Collections Review Committee should both sign the form. Procedures for deaccessioning are included in the current Procedures Manual. An agreement between the City of Pierre and HPCI needs to be drafted so funds from proceeds raised by deaccessioning are transferred to an HPCI managed collections account.

5. Loans

The Museum actively borrows objects from individuals and other institutions. To date there are 160 items on loan in current exhibitions. Both incoming and outgoing loan policies are included in one of the draft collections management policies. Incoming and outgoing loan procedures have also been drafted.

Currently, all potential acquisitions are accepted by the Museum under a temporary loan agreement. A temporary custody receipt is only issued for materials brought to the Museum for identification. It is a standard museum practice to issue temporary custody receipts for all potential acquisitions and items being held for research and further identification. Currently, there are 275 items listed as being on temporary custody/deposit. It is unclear whether this figure includes potential acquisitions but this is a large number nevertheless. A time limit needs to be set for all items on temporary loan agreement or in temporary custody. The limit for most museums falls between thirty and ninety days. Giving authority to the Director and Curator to accept some acquisitions without having to wait for the Collections Review Committee to meet would alleviate holding onto temporary loan items for long periods of time.

One of the draft policies does state that "Objects must be claimed by the owner or owner's duly authorized agent on or before the removed date specified on the

Temporary Custody Receipt. If after 30 days, the owner fails to retrieve the object(s), the Pierre Museum may place the object(s) in storage or return them at the owner's expense and risk. If the object(s) are not claimed after one year, they shall become an unrestricted gift to the Pierre Museum..." A Temporary Custody Form should be written to replace the current Temporary Loan Agreement Form. The conditions and time limitations of the temporary custody should be made clear to the depositor on the form. Again, the *PastPerfect* collections software has templates for Temporary Custody Forms as well as data fields specifically designed to keep track of items on temporary deposit.

6. Legal Issues

The greatest legal challenge facing the Museum is the large quantity of objects in the permanent collection that lack valid title. Fortunately, policies and procedures are in place so the Museum will be able to gain clear title on future items that enter the collection. Staff should become familiar with Ohio's current abandoned property law and start the process of claiming valid title on at least a portion of this collection. A copy of the State of Ohio amendment for acquiring documented title to undocumented property is included in the resource notebook.

Currently, the Museum does not hold any collections or engage in any activities that raise issues regarding compliance with associated laws and regulations. However, the Director, Curator, and Collections Committee should be aware of laws and regulations dealing with non-living collections including the Native American Grave Protection Repatriation Act and the Archaeological Resources Protection Act.

7. Safety as It Relates to the Collection

The one potential health and safety hazard found in the collection is textile material that had been treated with mothballs. The textiles were allowed to air out before being placed in storage. The staff should become familiar with items commonly found in historical collections that may pose health and safety hazards. These materials include munitions, nitrate negatives, and moving picture film. In the future if any of these materials are accessioned into the collections, procedures should be developed to protect staff and visitors from the material's risk.

8. Documentation

Within the past seven years, the museum staff has merged collections from several sites into one collection under the control of the City of Pierre's Office of Historic Resources. Along with an accession number, each object was assigned a letter code based on the site of origin. The staff should be commended for making it a priority to establish a system to effectively identify and merge the collections into one cohesive body.

Hard copies of documentation including Deed of Gifts, condition reports, written catalog information, and other associated paperwork are filed in the Curator's office by donor's name. The files would be more readily identified and easier to access if they were re-filed by accession number. Most of the time, it is the information on an object that is needed rather than donor information.

Currently, the Museum utilizes an older version of the *PastPerfect* collections management database to enter cataloging data on the collections. So far only about five percent of the collections has been cataloged in the database. *PastPerfect* contains fields for accession numbers, source information, descriptive information, condition reporting, deaccession information, incoming and outgoing loan documentation, temporary custody information, and insurance data. Photographs or scans of the material can also be downloaded to the database. To date, most of the data entry has been completed by interns and volunteers. The quantity and quality of information entered into the system varies greatly for each catalog record. The majority of the electronic records viewed by the Surveyor did not have the People category or Search Terms category completed. Entering data into these fields would make the database more searchable for staff and researchers who are interested in finding material relating to a specific subject matter.

Catalog entries also showed evidence that different data entry procedures were followed by different volunteers. Archival material was cataloged on both the objects screen and the archives screen. A data entry manual needs to be drafted so all staff and volunteers are entering the same type of information in the correct fields. Procedures covered in the manual should include nomenclature systems to be used, the structure of the description field (complete or incomplete sentences), storage location codes, and a list of fields that must be completed for each entry. Data backup procedures should also be included in the manual. A descriptive list of museum object data fields is included in the resource notebook.

PastPerfect does have an upgrade that would allow the database to be placed on at least two of the Museum's computers. The Curator should keep the master database on her computer. Other staff, volunteers, and interns utilizing the system could enter data on the second computer and copy the newly entered data onto the Curator's computer at the end of the day. The Curator should also complete a three-day training workshop offered by *PastPerfect*'s software company so she can become more familiar with the system's features. The workshop covers topics such as data entry for the collections management fields, drafting collections forms, and data entry for the membership/fundraising component of the database. The most recent version of *PastPerfect* should be purchased so that the upgraded features of the program can be utilized.

9. Backlog

The Museum does have a large volume of material that needs to be accessioned, cataloged, photographed, labeled, properly stored, and conserved. Every effort should be made to process the backlogged material within the next several years. If the material is not processed within a reasonable amount of time and if more artifacts and archival material continue to be acquired, it will not be long before there will be little intellectual and physical control over the collection. The primary duty of a museum is to document and preserve collections that it has been entrusted with. If the amount of backlogged material continues to increase, access to and preservation of the collections are in jeopardy.

To facilitate tackling the backlog, a Collections Management Initiative (CMI) should be developed. The written CMI would identify the stages and goals needed to obtain intellectual and physical control over the collection. Typical tasks included in a CMI are inventory, data entry, donor and object research, deaccessioning and digitization of the collections. An outline on developing a CMI is included in the resource notebook.

Two factors contributing to the ongoing backlog are the shortage of staff and lack of workspace. If the budget allows, temporary collections assistants and/or museum technicians should be hired solely to work on the backlog. Examples of position descriptions of each are included in the resource notebook. As has been done in the past, interns and volunteers can also be utilized to process and catalog material. It is important that the Curator has ample time in her schedule to supervise the personnel. Collections procedures related to cataloging, marking, data entry, and inventorying should be written prior to the start of the project. All staff and volunteers working on the backlog should complete a training process. The Curator should also closely monitor the CMI staff and volunteers' work and review data entered into the collections database.

To free up more of the Curator's time during the CMI period, the quantity of new exhibitions should be scaled back. Public programs incorporating several stages of the CMI can be planned in lieu of new exhibitions. Lectures on the care and preservation of historic material could be held. A specialist on a certain facet of the museum's collection could also give a lecture on the history of the identified material. For example, a costume specialist could give a lecture on the history of a type of textile found in the Museum's collection. Staff would be able to gain a deeper knowledge about the item that would be useful for cataloging and preserving the material.

Designated space for undertaking the CMI would need to be assigned. Work space would be needed for temporary storing the artifacts and archives that will be processed that day, laying out the material, cataloging, photographing, numbering, writing a condition report, and re-housing in an appropriate storage container. A computer would also need to be accessible for data entry into the collections database. It is important that the Curator be located in the same building as the employees and volunteers working on the CMI. The current staff workroom would suffice if other functions and employees not working on the CMI were transferred elsewhere. Another option would be to temporarily use the first floor exhibition gallery for the CMI processing for a period of six months to one year. This would give the necessary space for at least two individuals to work at one time. A temporary barricade could be built barring public access to the gallery or, staff may choose to allow the public to observe the process. A waist-high barrier could be constructed so visitors could communicate and ask questions with the staff. Exhibit panels at the entrance of the area could explain the CMI process and the importance of cataloging and preserving the Museum's archives and artifacts. Several prominent pieces from the Museum's collection could also be rotated in an exhibition case at the entrance to the workspace.

10. Inventory

An integral part of the CMI process would be completing the first systematic inventory of the collections. The collections management policy under development does have a section on inventory that stipulates daily visual inspections of exhibition cases and weekly inspections of off-site exhibitions and storage facilities. The policy states that a comprehensive inventory supervised by the Curator is to be conducted annually in January. The policy should further define the type of annual inventory whether it be spot checking objects to records or records to objects, a systematic inventory of every item in the collection, or spot checking in combination with a systematic inventory of a different portion of the collection each year.

Inventory procedures should provide detailed guidelines for recording locations, examining conditions, and reconciling objects to records and records to objects. These procedures need to be incorporated into the CMI.

11. Risk Management

An outline of Emergency Procedures and a Disaster Preparedness Plan has been developed. Staff should complete the writing of the procedures and plan as soon as possible and train all staff on implementation. The outline includes an overview that will list types of threats, visitor and staff safety, and describing circumstances when the police department fire and rescue and/or the alarm company need to be called. General Instructions will include telephone numbers of staff, emergency numbers and additional resources. Emergency Procedures, as outlined, cover security alarms, elevator use, and procedures for responding to a variety of man made and natural disasters. Building Plans and Forms, Opening and Closing Procedures, Schedule of Building/Equipment Inspections, location of supplies, and an artifact priority list are also included in the outline and should be further developed for the plan. Examples of other institutions disaster policies and procedures are included in the resource notebook.

Emergency supply kits should be located at each site. Items included in the kit are gear for personnel safety, supplies for documentation, and supplies for basic artifact handling and salvage. A list of items generally included in an emergency kit is in the resource notebook.

A list of local conservators should also be included in the Disaster Preparedness Plan along with their contact information. The Plan should also identify areas that could be utilized for collections salvage, triage, and processing. This could include space at each of the sites where collections from other sites could temporarily be moved and/or other city owned space that would be conducive for salvage operations such as a warehouse, armory or other secure space. Since the Museum currently stores artifacts and other material at a commercial storage facility, procedures and contact information for accessing the facility in case of an emergency should also be included in the Plan.

12. Conservation

Currently, the Curator does an excellent job of ensuring that all items on exhibition are displayed utilizing appropriate mounting methods and light levels. The temperature and humidity levels are also monitored and controlled in the permanent exhibition area.

When necessary, professionally trained conservators are utilized to stabilize and conserve key artifacts in the historic collection.

Procedures should be developed to monitor temperature and humidity on a regular basis at all of the sites. Installing several portable data loggers at the sites and in the off-site storage units is recommended. These loggers can be downloaded on a weekly or bi-weekly basis. While improving environmental conditions at the off-site storage facility is beyond the staff's control, data from the data loggers should be monitored for extreme fluctuations that may necessitate transferring sensitive artifacts from the unit to a more environmentally controlled museum site. Findings from the storage unit data loggers may also further justify acquiring additional city-owned property for collections storage where environmental controls can be adjusted by staff. A data logger should also be placed in the collections storage closet adjacent to the staff workroom. Currently, this space has no environmental controls. Staff should check to see if the ambient heat and cooling from the workroom is sufficient.

Very little of the collections are stored in museum quality shelves and cabinets. Plastic shelving units are used at the off-site storage units since the Curator can assemble these by herself. While the majority of the items on the shelves are wrapped in acid-free tissue, laying a layer of polyethylene foam atop each shelf will provide additional cushioning of the artifacts and can serve as a barrier from any chemicals used in the shelves construction. The shelves in the storage closet should also be lined with an inert material such as Melinex as a barrier to acids that may be found in the wood. A portable rack should be constructed to provide storage of framed material currently leaning against each other in one of the storage units. Additional storage specifications and directions for constructing a rack for framed objects can be found in the resource notebook.

It would be impractical to purchase a large quantity of permanent storage fixtures until a complete inventory of the collections is completed. Once the staff has an idea of the number of artifacts and types of materials found in the collection, the collection needs relating to storage spaces and fixtures can better be determined. A long-term goal for the Museum should be to procure dedicated collections storage space either at one of the Museum sites or at another city-owned building that can be retrofitted to provide the security and environmental controls needed for collections storage.

The Museum recently received funding from the City to install ultraviolet light filters on the windows of the Langley-French House. An ultraviolet light meter should be purchased to measure and monitor light levels from windows in future exhibition and storage areas. Staff does regularly monitor light levels in the permanent exhibition gallery.

To further determine conservation needs and conditions of various types of artifacts within the Museum's collection, it is recommended that the staff apply for a conservation assessment. Administered by Heritage Preservation, the Conservation Assessment Program (CAP) is a non-competitive grant that funds a visit and survey by a

professional conservator and a preservation architect if needed. Information on the CAP program is included in the resource notebook.

Recommendations

- **Draft separate collections procedures manual for staff and volunteers.**
- **Expand acquisitions policy to more fully explain types of documentation required for purchases, bequests, and exchanges.**
- **Develop policy for accepting material offered by a member or relative of the Museum's staff, advisory board, or governing body.**
- **Re-establish criteria by which acquisitions need approval from the Collections Committee.**
- **Review Ohio's Abandoned Property and Unclaimed Loan legislation to establish criteria for accessioning and deaccessioning material that the Museum currently does not have valid title to.**
- **Develop a Deaccession Form to formally document each deaccession.**
- **Establish guidelines and time limit for holding objects in temporary custody. Revise Temporary Custody form to reflect guidelines.**
- **Write data entry procedure manual for staff and volunteers to follow when entering data into the *PastPerfect* database.**
- **Curator should attend a *PastPerfect* training workshop.**
- **Develop a Collections Management Initiative plan to include a time frame and procedures for accessioning, inventory, data entry, research, deaccessioning, and digitization of the collections.**
- **Recruit interns and volunteers and/or hire temporary staff to process backlogged material.**
- **Designate dedicated workspace for undertaking the Collections Management Initiative.**
- **Further define types and frequencies of inventories conducted.**
- **Complete the writing of the Emergency Procedures and Disaster Preparedness Plan, train staff on implementation.**
- **Assemble emergency supply kits for each site.**
- **Develop written environmental monitoring procedures. Purchase data loggers to monitor temperature and humidity in exhibition and storage locations.**
- **Line shelves in storage units and the archive closet to provide additional buffer for collections.**

- **Procure city owned dedicated collections storage space, retrofit with museum quality shelving and cabinets.**
- **Monitor ultraviolet light levels at all of the sites.**
- **Apply for a Conservation Assessment through Heritage Preservation.**

D. Administration

1. Staff

Currently the Museum does not have a position that is dedicated to maintaining and preserving the collection. While the Curator has an educational and professional background working with museum collections, her dual role as Visitor Services Manager precludes her from spending a large amount of time working with the collections. Ideally, the Curator's position should be autonomous which would allow her to concentrate a greater amount of time on collections management tasks.

In lieu of shifting the Curator's collections workload to full-time, a full-time or part-time Curator of Collections or Collections Manager position should be established. Due to the large amount of backlogged material that needs to be processed, having one person who is constantly focused on collections projects will be of vital importance to the Museum at least until the bulk of the permanent collection has been accessioned, inventoried, cataloged, photographed and re-housed. Other collections management duties that need regular attention are environmental monitoring, housekeeping, and accessioning and processing new material into the permanent collection.

In the past, the Museum has utilized interns and volunteers to assist with collections management duties, namely cataloging and data entry. This practice should continue, volunteers could be especially useful with assisting with working on the backlog. However, it is vital that volunteer staff receives appropriate training and are closely supervised by the Curator or another paid staff member. The procedure manual should be updated and volunteers should go through extensive training on all of their duties before they are permitted to work independently. Having a data entry manual for cataloging material in the *PastPerfect* database is especially important so that everyone is entering the same type of material in the relevant data fields.

2. Finance

The majority of the Museum's funding comes from the City of Pierre. Historic Pierre City, Inc. also provides funding for several of the Museum's programs including funds for acquisitions. While the current budget does meet basic needs for collections supplies and related equipment, an increase in the line item budget for Museum Collections Management will be needed once the Collections Management Initiative is established. Funding will be needed for software upgrades, storage materials for re-housing, and preventative conservation and cleaning supplies.

Increasing the collections management line item budget can be accomplished by temporarily transferring funds from another line item for at least one fiscal year, working

with HPCI to mount an aggressive fund raising campaign specifically for documenting and preserving the collections, and/or partnering with HPCI to create a series of seminars, lectures, or workshops with proceeds earned being earmarked for collections care.

The greatest financial challenge in the immediate future will be to procure funding for additional staff to manage and document the collections. Ideally within the next several years, funding should also be obtained for a permanent collections storage facility. Grant money can be obtained to offset a portion of the costs incurred by both needs. Private foundations and some government agencies may fund a temporary project specific position such as a one year position to complete the processing and produce finding aids for a portion of the archival collection. Grant money may also be utilized to purchase museum quality storage fixtures, conduct conservation surveys on various segments of the collection, and perform conservation treatments on specific objects in the collection. Information on several federal grant programs is included in the resource notebook.

3. Facilities

The museum staff currently manages three facilities within the City of Pierre; the Museum and Visitor Center, Langley-French House, and the 12 acre Charlotte Estate which includes two mid-nineteenth century houses and a family cemetery. Within the next several years a new interpretive center will also be built on the grounds of Charlotte Estate. In addition collections and museum equipment and supplies are stored in two storage units at a commercial storage facility and in a room in a city-owned building adjacent to the Museum and Visitor Center.

All of the storage and collections work areas are overcrowded with little space for staff and volunteers to catalog, document, photograph, and clean artifacts. There is also no dedicated space for researchers to work and aside from a set of shelves, little space for new acquisitions to be separated from the rest of the collection to monitor for pest infestations. All of the storage areas appear to be at capacity with little room for new acquisitions.

While the staff has made a valiant effort to organize the two storage units, they too are overcrowded. Artifacts have to be moved simply to enter each unit. An additional storage unit should be rented to relieve the cramped spaces. Artifacts and historical material should be separated from non-collections. If possible, one unit should be reserved for fixtures, cases, and other equipment while the other two be used exclusively for artifacts. As mentioned before, a long-term goal for the Museum should be to acquire collections storage space either at one of the current sites or in another suitable city-owned building. Ideally, a collections work space would be adjacent to the storage area to prevent staff from having to make vehicle trips to pick up artifacts, bring back to a work space to catalog, research and/or clean, and then drive the artifacts back to storage.

Currently the city's archaeological collection is stored in boxes amidst exhibition fixtures, supplies, and seasonal decorations in a storage room in a city-owned facility next door to the Museum and Visitor Center. Evidence of pests was detected in the storage room and the temperature and humidity levels in the room were problematic.

Ideally, the archaeological materials should be stored in a dedicated space with room to expand the collection. This room would suffice as an interim storage room if all of the non-archaeological material was moved to a different location and the environmental controls were regulated to better meet collections preservation standards.

The Curator is responsible for pest management and monitoring sticky traps when her time permits. An integrated pest management plan should be adopted that involves routinely monitoring for pest activity in all of the sites and storage areas, limiting live plants and food in areas with museum collections, and adhering to a regular housekeeping schedule. Guidelines for adopting an integrated pest management plan are found in the resource notebook.

Written housekeeping procedures should be established for all Museum exhibition and storage spaces. Guidelines and schedules should be written for dusting, vacuuming, polishing, and cleaning display cases and artifacts on exhibition. Janitorial service guidelines should also be established for the contract janitorial crew to follow at each site. It is important for the Curator to continue to provide input for the custodial contract and to supervise the custodial staff at each site.

During the site visit, all of the Museum's buildings appeared to be well maintained with no major maintenance or structural issues. The ongoing work at the Charlotte Estate is being overseen by firm with experience preserving and restoring historic properties. The staff also works closely with the City's Public Work's Department to schedule both routine and on-call maintenance issues.

The greatest problem concerning facilities management aside from a lack of dedicated collections storage space is the dire shortage of staff work space. Administrative functions, exhibition fabrication and design projects, object conservation, and collections cataloging and processing are all carried out in the same space, namely at several six foot rectangular tables. Often, staff must waste time moving materials and supplies between tables to accommodate special work projects.

The amount of space designated for collections cleaning, cataloging and re-housing is inadequate. Hopefully when the new interpretation center opens, the administrative and education staff can be transferred to the offices in that facility, freeing up the current work space for collections and curatorial functions. However, if additional collections staff and/or volunteers are recruited, the work space may need to be expanded, especially to facilitate a Collections Management Initiative. As mentioned earlier, a temporary solution would be to utilize the current rotating exhibition space for several months to process and photograph the backlog of collections.

A long-term goal for the Museum should be to establish a dedicated facility incorporating both collections storage and curatorial and collections work space. While a significant amount of funding would be needed up front to construct a new space or retrofit an existing space, money will be saved in the long run by not having to rent commercial storage units. Construction funds could be matched with grant funds for the purchase of museum quality storage fixtures.

4. Safety and Security

The staff has effectively identified safety and security risks to both the building and personnel and is working on drafting plans to respond to each risk to be incorporated into future Emergency Procedures and Disaster Preparedness Plan. Staff has also completed a Standard Facility Report for the Museum.

The greatest security concern is that the staff workspace where some collections are routinely stored cannot be locked due to fire codes. On weekends and at other times when staff are not present, visitors potentially have easy access to the space. The sole deterrent at the present time is a sign on the door stating that access is not permitted unless there is an emergency. A greater security measure would be to install an audible alarm on the door that could be heard by staff downstairs. If the work space continues to be used as the primary collections processing area, several storage cabinets with locks should be purchased to house the collections temporarily being stored in the space.

The Museum has an automated fire detection system and portable dry chemical fire extinguishers. The location of each fire extinguisher should be recorded and all personnel should be familiar with their locations. Proper training on the use of the fire extinguishers should be provided for all new employees as well as refresher training every several years for all employees.

Recommendations

- **Create a dedicated Curator or Collections Manager position.**
- **Recruit additional interns and/or volunteers for collections management duties.**
- **Increase collections management budget at least temporarily to fund Collections Management Initiative.**
- **Seek additional funding for upgrading collections storage facilities and fixtures.**
- **Write Integrated Pest Management procedures.**
- **Establish written housekeeping procedures and janitorial service guidelines.**
- **Increase secure measures by installing audible alarm at staff workroom door.**
- **Acquire several museum quality locking storage cabinets to house collections temporarily stored in staff workroom.**
- **Re-familiarize personnel with portable fire extinguisher locations. Offer a refresher course for the use of the fire extinguishers.**

E. Governance

The Pierre Museum and Visitor Center operates under the auspices of the Office of Historic Resources, City of Pierre. The Board of Directors of Historic Pierre City, Inc. serves as an advisory board for the Museum. A Collections Review Committee consisting

of current and former HPCI members reviews all acquisitions and offers support for collections management and conservation initiatives.

Educating current HPCI board members on the importance of collections stewardship was cited as a challenge in the *Self-Study*. A more formal process of orientation and training needs to be established for both HPCI board members and the Collections Review Committee. All board members and committee members should receive a briefing on the scope of the collection, tour of the collections storage facility, a copy of the collections management policy, and briefing on ethical responsibilities of board members at the time of their appointment. Since the Museum is also governed by a parent organization, at least one current City Council member should participate in the orientation and receive copies of the relevant materials as well.

Apply for a Museum Assessment Program Governance Assessment. Like the Collections Management Assessment, the Governance Assessment would provide funds for a site visit and a written report. The Governance Assessment evaluates the roles, responsibilities and performance of the governing authority, makes recommendations and provides resources for further improvement. The Museum may also want to utilize the services of a governance support organization to more effectively train the governing authority on the roles and responsibilities of board members. Information on several workshops for board members conducted by the Museum Trustee Association is included in the resource notebook.

Recommendations

- **Establish a formal orientation program for new HPCI board and collections committee members.**
- **Apply for a MAP Governance Assessment survey.**
- **Investigate conducting additional training opportunities for staff and board members on museum governance issues. Consider hosting a workshop for board members sponsored by the Museum Trustee Association.**

Summary

Since the establishment of the Office of Historic Resources by the City of Pierre in 2000, the Museum staff has made great strides to merge historic collections previously located at several sites into one collection. Accessioning all artifacts into the collection has been initiated and staff has begun to develop policies and plans to better manage the collection. A significant accomplishment was the installation of the permanent exhibition. The exhibit effectively covers the city's history while the exhibition themes reinforce the parameters of the collection. Renovating and restoring the Museum's three historic sites is an ongoing project that has and will continue to contribute to improvements in the interpretation, preservation, and security of the collection.

Short-term goals that should be accomplished within the next year include;

- Rewriting the Museum's mission statement to better reflect the collecting and interpretation focus, identify audience served and methods used to educate the public, and define the physical boundaries of interpretation.
- Developing a five to ten year long-range plan to include exhibitions, programming, marketing and public relations, capital improvement projects, collections use and care, and fundraising goals. The initiatives in City Council's most recent comprehensive plan can be used as a foundation for the long-range plan. These initiatives should also be broken down into more manageable annual goals.
- Drafting a collecting plan separate from the collections policy incorporating current collecting and historic themes. Plan should cover how collection fulfills research, exhibition and programming needs, current resource constraints and criteria to determine when a collecting category is full.
- Creating updates to collections policies and incorporating into one collections management policy document. Recommended updates include; expanding current acquisitions policy to more fully explain types of documentation required for purchases, bequests, and exchanges; reexamining criteria by which acquisitions need approval from the Collections Committee; developing policy for accepting material from a member or relative of the Museum's staff, advisory board, or governing body; and establishing guidelines and time limits for holding objects in temporary custody.
- Writing separate procedures manual for staff and volunteers to include; data entry procedures for *PastPerfect* database; inventory procedures; environmental monitoring procedures; integrated pest management procedures; and housekeeping and janitorial service procedures.
- Establishing criteria for accessioning and deaccessioning material that the Museum currently does not have valid title to based on Ohio's Abandoned Property and Unclaimed Loan legislation.
- Developing a Deaccession Form to formally document each deaccession.
- Planning for Curator to attend a *PastPerfect* collections software training workshop.
- Developing in writing a Collections Management Initiative plan to include a time frame and procedures for accessioning, inventory, data entry, research, deaccessioning, and digitization of the collections.
- Procuring dedicated workspace for undertaking the Collections Management Initiative.
- Lining shelves in storage units and archive closet.
- Acquiring an ultraviolet light meter to measure ultraviolet light levels at all of the sites.
- Applying for a Conservation Assessment through Heritage Preservation.

- Completing the writing of the Emergency Procedures and Disaster Preparedness Plan, training staff on implementation. Assembling emergency supply kits for each site.
- Increasing security measures for staff workroom.
- Acquiring several museum quality locking storage cabinets to house collections temporarily stored in staff workroom.
- Offering refresher training and identifying locations of portable fire extinguishers.

Most of these short-term goals require no funds to implement. However, planning, writing, and implementing will take a significant amount of staff time. Plans should be in place to at least temporarily decrease the Curator's daily work load so she has time to work on fulfilling these goals.

The most important mid-term goal will be to hire additional staff and/or recruit several interns and volunteers to assist with carrying out the Collections Management Initiative. Again, it is crucial that the Curator have ample time to train new personnel and undertake some of the work herself. Other mid-term goals that should be accomplished within the next two to four years include;

- Beginning Collections Management Initiative
- Reducing Curator's Visitor Services workload and/or creating at least a permanent part-time collections management position.
- Increasing collections management budget to fund Collections Management Initiative.
- Researching additional funding sources for upgrading collections storage facilities and fixtures.
- Renting additional storage unit, separating storage spaces into collections and non-collections material.

Once the Collections Management Initiative is well underway, the permanent staff should begin to plan for future exhibitions and additional programming and marketing opportunities. Goals should include;

- Developing and implementing new programs concentrating on reaching ethnically diverse demographics.
- Expanding exhibition opportunities by utilizing traveling exhibitions, guest curators and/or collaborating with other institutions. Additional grant and funding resources should also be researched.
- Upgrading collections management database to include online exhibitions and catalog information.
- Establishing a space dedicated for researchers. Writing procedures for researchers to follow.
- Developing additional promotional and scholarly materials utilizing portions of the collection.
- Working with HPCI to form a public relations committee.

- Applying for a Museum Assessment Program Public Dimension Assessment.

Providing materials on the Museum's collection and offering orientation on the Board's roles and responsibilities should also be an ongoing process, especially if new Board members are recruited within the next three years. Staff should work with HPCI to explore methods to improve communication with Board members by either providing new training opportunities through the Museum Trustee Association and/or applying for a MAP Governance Assessment.

The greatest long-term challenge for the Museum will be to procure additional city-owned space for the storage and ongoing processing of the collection. Ideally within five to eight years, the Museum should be able to move its collections and collections staff workspace into a facility that is under one roof. A combination of increased funding from government grants and/or private and corporate sources should be procured to assist with funding the facility and the installation of museum quality storage fixtures. The Pierre Museum's collection will undoubtedly continue to grow. Devoting several years to establishing sound collections policies, inventorying and cataloging the collection, and re-housing the collection in a secure environmentally controlled facility that provides collections staff with an accessible working environment will substantially pay off for many years to come. By demonstrating a commitment to collections care and documentation, the staff and governing authority of the Pierre Museum and Visitor Center will ensure that its artifacts and archives will be a well preserved, useful and documented asset to the community for many generations.

Suggested Reading

Mission and Collections Planning

Anderson, Gail. Museum Mission Statements: Building a Distinct Identity. American Association of Museums Resource Report, 2nd Edition, 1998.

Bryson, John and Farnum K. Alston. Creating and Implementing Your Strategic Plan: A Workbook for Public and Nonprofit Organizations. Jossey-Bass, 1995.

Collections Australia Network, *Significance: A Guide to Assessing the Significance of Cultural Heritage Objects and Collections*. 2005. Accessed via World Wide Web at http://www.collectionsaustralia.net/sector_info_item/5.

Gardner, James and Elizabeth E. Merritt. The AAM Guide to Collections Planning. AAM Professional Education Series, American Association of Museums, 2004.

Ogden, Sherelyn. Preservation Planning: Guidelines for Writing a Long Range Plan. American Association of Museums and Northeast Document Conservation Center, 1998.

Interpretation

American Association of Museums. Resource Report, *Taking Charge of Your Museum's Public Relations Destiny*. 2004

Hamilton-Sperr, Portia, Project Director, *Museums in the Life of a City: Strategies for Community Partnerships*. American Association of Museums, 1995.

Hendrick, Becky. Getting It: A Guide to Understanding and Appreciating Art. Houghton-Mifflin Company, 2001.

Sachatello-Sawyer, Bonnie, et.al. Adult Museum Programs: Designing Meaningful Experiences. AltaMira Press/American Association for State and Local History, 2002.

Collections Stewardship

American Association of Museums. *Writing a Museum Code of Ethics*. Resource Report 1993.

Bachman, Konstanze. Conservation Concerns: A Guide for Collectors and Curators. Smithsonian Institution Press, 1992.

Buck, Rebecca and Jean Allman Gilmore. The New Museum Registration Methods, 4th edition. American Association of Museums, 1998.

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

The Exhibition Alliance. *Basic Art Handling*. VHS, 1988.

Fox, Michael J. and Peter L. Wilkerson. Introduction to Archival Organization and Description. Getty Trust Publications, 1999.

Heritage Preservation, National Task Force on Emergency Respons. *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.

Malero, Marie C. A Legal Primer on Managing Museum Collections, 2nd Edition. Smithsonian Institution Press, 1998.

Ogden, Shereilyn, ed. Preservation of Library and Archival Materials: A Manual Revised and Expanded. American Association of Museums/Northeast Document Conservation Center, 1996.

Snyder, Jill. Caring for Your Art: A Guide for Artists, Collectors, Galleries and Art Institutions, 3rd Edition. Allworth Press, 2001.

Weil, Stephen. A Deaccession Reader. American Association of Museums, 1997.

Administration and Finance

American Association of Museums. *Museum Job Descriptions and Organizational Charts*. AAM Resource Report, 1999.

Cutler, Charlene Perkins. *The Employers Handbook: A Guide to Personnel Policies for Museums*. New England Museum Association, 1996.

Governance

Adams, Roxanna ed. *Foundations of Museum Governance for Private Nonprofit Museums*. American Association of Museums Resource Pack, 2002.

Fisher, Daryl K. and Barbara Booker. *Building Museum Boards*. Museum Trustee Association, 2001.

Leifer, Jacqueline Corey and Michael B. Glomb. *The Legal Obligations of Nonprofit Boards: A Guidebook for Board Members*. BoardSource, 1992.

Selected Resources Included in Museum's Resource Notebook

Mission and Planning

American Association of Museums, *Accreditation Commission's Expectations Regarding Institutional Mission Statements*.

-----, *Information Center Fact Sheet, Creating an Intellectual Framework for Collections Planning*.

-----, *Information Center Fact Sheet, Collections Planning; Strategies for Planning and Implementation*.

-----, *Information Center Fact Sheet, Outline for a Collections Plan*.

Collections Australia Network, *Significance: A Guide to Assessing the Significance of Cultural Heritage Objects and Collections*. Chapter 3: *The Significance Assessment Process*. Chapter 5: *Applications*.

American Association of Museums, *Accreditation Commission's Expectations Regarding Institutional Planning*

Lord, Gail, *Forward Planning and the Cost of Collecting*.

Rogers Historical Museum, *Permanent Collection Collecting Plan*.

State Historical Society of Iowa, *Collecting Plan*.

American Association of Museums, *Information Center Fact Sheet, Space Allocation*.

Interpretation

National Park Service, Harpers Ferry Center, *Interpretive Media Selection*.
-----, Northeast Region, Philadelphia Office, *Welcome to the Community Tool Box, Rivers Trails and Conservation Assistance Program*,

- *Select Your Tools*
- *Brochures, Flyers*
- *Newsletters*
- *Websites*

National Park Service, *Conserve O Gram, Planning A Research Space*

Local History Publishing Resources

PastPerfect Software Information, *Virtual Exhibit, PastPerfect Online*

American Association of Museums, *Public Dimension Assessment Fact Sheet*

Collections Stewardship

Lecompte, Elise, *Why? Because We Said So! A Guide to the Development, Implementation, and Enforcement of Museum Policies*. American Association of Museums.

American Association of Museums, *Code of Ethics for Museums*, 2000.

Code of Ohio Amendment and Legislation, *Property Loaned to Museums*

Dean, Catherine, *Putting Virginia's Unclaimed Loans Legislation to Work*

Minnesota Historical Society, *How to Ensure Trouble-Proof Loans*

Websites Relevant to Resolving Old Loans/Books and Articles Dealing with the Subject of Old Loans and Undocumented Property

American Association of Museums, *Information Center Fact Sheet, Writing A Collections Management Policy*

Smithsonian Institution Archives, *Components of a Collections Management Policy*

American Association of Museums, *Information Center Fact Sheet, Ethics of Deaccessioning*

-----, *Information Center Fact Sheet, Guidelines for Discussion of Deaccessioning*

ICOM, International Committee on Documentation, *CIDOC Guidelines for Museum*

Object Information, The CIDOC Information Groups and Categories. The full report can be accessed at <http://www.cidoc.icom.org/guide/guide.htm>.

Pastime Software, *Training Programs and Schedule*

The Valentine Richmond History Center, *Taking Back Your Collection: Developing Collections Management Initiatives*

-----, *Position Description: Museum Technician*

-----, *Position Description: Collections Assistant*

Museum-Ed, *Link to Sample Materials for Museum Interns*

Minnesota Historical Society, *Thinking Ahead about Museum Protection*

Northeast Document Conservation Center, *Worksheet for Outlining a Disaster Plan*

American Association of Museums, *Information Center Fact Sheet Hazards in Collections*

National Park Service, *Conserve-O-Gram: Datalogger Applications In Monitoring The Museum Environment, Part I: Comparism of Temperature And Relative Humidity Dataloggers.*

....., *Conserve-O-Gram: Choosing UV-Filter Window Films*

Williams, Scott, *Ethafoam and Other Polyethylene Foams in Conservation*

Masterpak, *Ethafoam Price List*

Gaylord, *Melinex Price List*

National Park Service, *Conserve-O-Gram: Determining Museum Storage Equipment Needs.*

....., *Conserve-O-Gram: Determining Museum Storage Space Requirements.*

....., *Conserve-O-Gram: Museum Storage Cabinets..*

Northeast Document Conservation Center, *Storage Furniture: A Brief Review of Current Options.*

Northern States Conservation Center, *Storage Guidelines*

Canadian Conservation Institute, *A Storage System for Paintings*

Heritage Preservation, *Conservation Assessment Program*

Administration and Finance

Northeast Document Conservation Center, *Funding: Federal Sources*

National Archives and Records Administration, *NHPRC Grant Information*

Northeast Document Conservation Center, *Integrated Pest Management*

San Bernardino County Museum, *Pest Management Policy*

Illinois Heritage Association, *Plan Your Work and Work Your Plan: Housekeeping in a Historic House*

Minnesota Historical Society, *Excerpt from Historic Housekeeping Handbook*, Entire handbook can be accessed online at:

www.mnhs.org/preserve/conservation/reports/manual-0102.pdf

Governance

Museum Trustee Association, *About Us, Trustee-to-Trustee Workshops*

American Association of Museums, *Governance Assessment Fact Sheet*

