

**Brown House and Railroad Museum**

**AAM Museum Assessment Program**  
**Sample Public Dimension Assessment Report**

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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.

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## **Brown House and Railroad Museum – Public Dimension Assessment**

The Brown House and Railroad Museum participated in the Public Dimension Assessment, which assesses the museum's public perception, experience, and involvement. This assessment assists a museum in effectively communicating with the public. It reviews the ways in which the museum interacts with its audiences, including marketing, public relations, audience development, and exhibitions, as well as the museum's performance in the areas of mission and institutional planning, interpretation and education, marketing and public relations, facilities and risk management, human resources, and financial stability.

### **Executive Summary**

The Brown House and Railroad Museum is an historic house museum that also shares the identity of the Charles County Historical Society. Despite limited staff and financial resources (common to many small museums and non-profits), the museum offers a solid visitor experience and several annual events that bring the community to the museum. However, every organization can improve on its current situation, and the following report offers suggestions and recommendations to take the museum further forward as it continues to develop and grow. Future challenges include capital campaigns to fund an HVAC system for the mansion and the renovation of the carriage house; as well as strengthening the identity of the Charles County Historical Society, a function that the museum has not focused on, but is encouraged to do so based on a recent survey of constituents.

### **Visit Overview**

The surveyor visited the museum in April 2008, spending two full days reviewing the museum and its operations. Most discussions took place with Diana Bishop, administrator. Several board members, staff, and volunteers also provided their insights about the museum. As part of the visit, several local attractions were visited.

### **Museum History**

The museum is housed in the Brown mansion, a Romanesque Revival house built between 1890 and 1894. The Brown family made their money through the railroad industry. In 1948, the Brown family opened the family home as the Brown National Railroad Museum. The museum preserves not only the furnishings of the mansion, but also houses collections related to the history of the railroad. In 1993, the museum adopted the additional identity of the Charles County Historical Society, under which its tax-exempt status lies.

### **Mission**

The purpose of this organization shall be to preserve the Brown family story, their mansion and the history of the railroad, and to communicate an appreciation of the history of the development of the railroad and its role in opening up the West.

## Introduction

The Museum listed three objectives for the PMAP visit:

- Create a guide to use marketing funds and energies
- Review mission statement
- Create a case statement for restoration of carriage house.

All three are evaluated in this report, but as many areas overlap, there is a certain amount of repetition between sections. Although pursuing AAM accreditation was not stated as a goal for the museum, the museum is in a good position to consider working toward AAM accreditation, and many of the following recommendations would lead the museum closer to that step.

### Priority Recommendations:

- Like many museums of this size, the Brown House and Railroad Museum need more staff in order to accomplish all it wants and needs to do. The board needs to find other funding sources for salaries and to recruit dedicated volunteers who can take on more responsibility.
- The museum has been offered a challenge grant. Finding the matching funds is a top priority for the museum. A committee needs to start working on this immediately.
- The museum is embarking on a capital campaign. While estimates are available for the capital work, the museum needs to have more exact costs in order to plan their fund raising campaign. Research costs of HVAC work and how much space new system will occupy, as well as costs of moving and placing collections in climate-controlled storage while work is progressing. Also research costs of carriage house restoration.
- Apply for a Governance Assessment through MAP (information available on: <http://www.aam-us.org/museumresources/map/index.cfm>) – this will provide an assessment of the board, which will help as committees are formed and assignments made to fulfill strategic plan goals and fund raising goals.
- Apply for Institute of Museum and Library Services funds for new staff positions. While the funding would support a position for only one or two years, having a full-time staff member devoted to creating an educational program for schools or cataloguing the collections would enable someone to focus on these projects and move them to fruition.
- Research becoming a state historic site, benefits and drawbacks of the association.
- Pursue Accreditation through AAM (information available on: <http://www.aam-us.org/museumresources/accred/index.cfm>). To pursue accreditation, the museum must write a code of ethics, collections management policy, and a disaster plan.

## **A. Mission and Institutional Planning**

### **1. Mission and Vision**

The museum's administrator has the strongest understanding of the museum's mission and its application to the museum and its activities. Board members, other staff, and volunteers understand the importance of the museum, the collections and history it preserves, and why it exists, but the mission statement is not an active, living part of their interaction with the museum. One staff member said that the mission statement really wasn't important to daily activities.

The current mission statement does reflect the museum's current activities (although it does not reflect the historical society identity and activities), and is oriented to public service (preserve and communicate). But the statement is long and tries to encompass everything the museum does and is, and not does currently reflect the identity of the Charles County Historical Society. Mission statements are usually one to two sentences long – easier to remember and act upon. Creating one mission statement for the museum, one for the historical society, and one combined statement for both entities would give the museum better definition of what their focus is, which will assist in collections planning and acquisition, fund raising, interpretation, and other activities.

According to Gail Anderson in *Museum Mission Statements*, a well-crafted mission statement demonstrates the following characteristics:

- Three key elements: (1) reason why the museum exists, (2) audience/market served, and (3) deliverable services or means for achieving the mission.
- Words that convey the parameters of the museum,
- Institutional priorities that indicate what the museum emphasizes, and
- A format that is concise, direct, and uses clear and appropriate language.

It is recommended that the museum consider revising its mission to more effectively communicate *why* the museum exists and *how* it relates to its public. When describing the value of a mission statement, Harold Skramstad, former President of the Henry Ford Museum & Greenfield Village, wrote that, “a clear and focused statement of mission stakes a museum's claim to its distinctiveness, is a guide to action, and a powerful yardstick against which the museum itself can assess each and every activity it carries out.” An excellent tool that can help direct this process is *Museum Mission Statements: Building a Distinct Identity*, edited by Gail Anderson and printed by the American Association of Museums in 1998.

### **Recommendations:**

- Review all versions of the mission statement and adopt one shorter, consistent version of the mission statement. Invite staff, volunteers, and board members to participate in a mission statement exercise that will hone the mission and make it representative of the museum and its activities. Offer members a chance to assist in revision of mission statement so that it reflects how public view the museum instead of just the staff and board. A consultant could assist in running a retreat or workshop to lead participants through the mission statement process.
- Consider creating one mission statement for the museum and one for the historical society, as well as one blended mission statement.

- Post mission statement on museum Web site, brochures, at entrance to museum and gift shop, any other materials or public areas. Share the new statement with the larger community with some fanfare—a news article, a party to announce your renewed community focus, which includes citizens’ helping to brainstorm some new programs, etc.
- When revising the mission statement, ask these questions:
  - What should we be doing? How do your constituencies feel about the museum’s efforts at preserving and communicating?
  - For whom should we do it? Whom do you want to serve?
  - What tools will we use to get there? (exhibitions, collections, tours, partnerships, etc.)
  - Are all programs tied to your mission? Are you serving the public you said you’d serve? Do people care about what you do?

## **2. Institutional Planning**

The museum has several reports and plans to guide its institutional planning, including a strategic plan that also includes a facilities plan, an IMAP from 1987, a CAP, and a feasibility study for the proposed capital campaign. However, the plan is not an active document that drives the activities of the museum. Many of the dates on the plans have passed with the action step and goal remaining unfulfilled. The plans are great tools that are tailored to the museum, address its major challenges, and offer realistic goals, but they need to be used and implemented.

### **Recommendations:**

- Update plans with new deadlines – create a new timeline, assign human and financial resources to each goal and action step, assign staff responsibilities for completion of action steps.
- Work with board to create committees to address goals and start addressing the needs and objectives of the plan.

## **3. Engaging the Community**

The museum has a good understanding of how it is perceived by the community, what its current role is, and what its future role could be. The museum regularly surveys its visitors with a small survey kept near the guest book, tabulates and evaluates demographic information from visitors to its special events, and performed several surveys as part of the preparation for the PMAP. The results from these instruments are used by the museum as it tries to expand its marketing and fund raising abilities. While the museum, at the moment, seems to be perceived as a place you visit once, museum staff members are actively trying to change that perception to encourage more repeat visitation through varied special events and new activities. The museum also has a membership program that enables the museum to connect with the community.

The museum seems to be active in and supportive of the community. It has attracted board members that are active in the larger community, and has maintained relations with the other museums and attractions in the area. The museum is also flexible in how it interacts with the community. For example, while the museum is not usually open on Mondays, it will open or change tour times to accommodate visitors, thereby serving the community.

The museum maintains connections with many community organizations, although these connections are informal. The various non-profits in the area seem good at exchanging information on funding, marketing ideas, etc, but most of the staffs don't have time to pursue the connections into fully developed partnerships. For example, creating a package bus tour that brought visitors to several of the attractions would be a positive activity for all the non-profits, but none of them have the time, staff, or other resources to pursue this.

These connections are and can be mutually beneficial as creating these partnerships can provide a stronger presence in the area. A group of the area non-profits could apply for a grant that would assist all the organizations (fundors love partnerships as their grants therefore serve more than one organization) or band together to create marketing strategies that would serve all the organizations.

The museum's public dimension is strengthened by the museum's board, which now consists of members who are active and involved. They want the museum to grow and develop, and many members offer resources that are helpful to the museum in pursuing its goals. However, the museum has limited financial resources, and while, they do stretch their public dimension dollars well, additional financial resources would greatly benefit the museum, if only to hire more staff who can implement more public dimension activities or to fund larger marketing efforts.

The governing authority has assisted the museum with active, ongoing, collaborative efforts to expand the museum's public dimension, including for example, the use of a car as a raffle prize for a fund raiser; assistance in connecting with local school systems; assisting with graphic design and printing; and even offering to help distribute brochures to local hotels, visitors centers, etc.

### **Recommendations:**

- Establish a formal connection with other local non-profits, perhaps with a monthly meeting whereby information can be shared and joint projects be developed.
- Hold a yearly members' meeting as an additional benefit for membership. This will enable people to visit the museum, socialize with others, and give board and staff a chance to network with potential donors.
- Examine membership price and benefits. Research memberships offered by other historic sites in the area and charge market prices. Consider offering a special "railroad" membership for railroad enthusiasts with railroad-specific programming. Consider offering a special "architecture" membership for those interested in architecture. Consider giving each level a special name related to railroads – for example the Conductor level.
- Cultivate relationships with local politicians and elected officials. Finding ways to work successfully with government is vital for small museums. Some recommendations - way-finding signage and transportation —will only be possible with political support. Consider inviting asking the Mayor's wife to join the Board and/or the wives of city council people or commissioners. Staff and Board should also look for ways to constantly bring their achievements to the attention of government officials, to remind them of what an asset the museum is.

## **B. Interpretation and Education**

### **1. Audience**

The museum has a very clear idea of what its most consistent, current audiences are (seniors and tourists) and which audiences it wants to increase (bus tours, students). It also has a clear idea of the competition for these audiences, although the “competition” seems to be congenial and open to not only finding ways of working together to increase audiences, but also to sharing information and ideas.

The museum determines goals for attendance by comparing current year’s attendance to past years for school tours and special events, and by comparing income from these sources. These goals are clear and appropriate. A more sophisticated form of goal setting could include tracking attendance by audience, for example, the number of students and school groups each year or the number of bus tours each year.

The museum identifies its primary audience as seniors and one-time visitors, school groups, and tourists. Currently, the museum serves the audiences well, but could serve them better and encourage more visitation if more targeted activities and educational experiences were developed. For example, by creating experiences for students that are in line with No Child Left Behind standards and that match specific areas of school curriculums, school group tours would increase.

The current visitor experience is solid. Tours not only offer a view into the life of the Brown family in the 19<sup>th</sup> and 20<sup>th</sup> century, but it also offers the history of railroads, as well as local history. Special events such as the annual summer festival, also offer a visitor experience that keeps residents returning.

The museum offers accessibility through a ramp and a video that shows the upper floors, which are not accessible to those in wheelchairs. Many of the labels are hard to read, but are secondary to the docent tours. Given the limitations of an historic house, the museum offers good accessibility.

In order to increase school tour numbers, teachers need to be able to justify field trips to their administrators. To help them, the museum will need to develop methods and brochures that outline how touring the museum can help teachers meet their specific curriculum goals.

### **Recommendations:**

- Access local school curriculums for all grades and age levels and identify those required topics for which the museum can offer content. Create teacher kits and materials that provide museum content for these curriculum areas and market the materials to schools as a way of increasing school attendance. Consider funding a temporary year-long staff position that will focus on organizing and marketing this effort. (find the website that has the curriculum for the county).
- Develop a school programs brochure which highlights the tours you offer and lists the curriculum standards your tours will help the teachers meet. Work with faculty at local

universities to create internships/practicums for education students who can help you to complete this brochure. Put the brochure in PDF format on your Web site.

- Arrange to speak at PTA meetings and at school in-services to help spread the word about your tours.
- Locate the local National History Day coordinator to work out strategies for offering students the resources of the museum for National History Day projects.
- Contact the Convention Center in Charles County and find out how to create a bus tour that can be offered to people attending conferences and conventions. For example, if you look at the AAM conference program, several bus tours are offered at the beginning or end of the conference in addition to conference activities.
- Contact the local library system to create partnerships. Many of the people in your community use the public libraries and they are a great way to get out the word about your museum to people you have yet to reach. If the libraries have local history sections, some cross-marketing could bring people to both the library and museum (particularly genealogists looking for information on local history).
- Don't forget home schoolers. Tap into the local home school network and offer special tours for home schooled children.
- Connect with local Boy and Girl Scout troops. See if any of their badge requirements can be met through projects at the museum.
- Consider creating a "teachers' night out" where teachers are invited to the museum - make it a social event - provide goodies, food, celebrate the teachers, show off the museum, and build good will.
- Consider creating a teachers' advisory group that promotes two-way communications between the museum and the schools.

## **2. Interpretive Planning and Research**

The main focus of the museum's content is the Brown family and their railroad business. However, due to the Charles County Historical Society designation that the museum also has, content beyond this is also offered, including content on the current boat business next door and other boat enthusiast content. Re-defining the mission would assist the museum in defining its content more clearly, which assists in planning activities and events, and making decisions about collections.

The museum has access to many sources of information about audience interests and needs. The required PMAP activities provided insight on the use of the name "Charles County Historical Society," which a high percentage of respondents suggested be embraced by the museum. A recent feasibility study also offered information about audience needs and interests, and their perceptions of the museum. Museum staff seem to have a realistic understanding of the information collected and what needs to be paid attention to and what to ignore (for example, the comment that the museum needs to allow people to eat and drink in the museum, sit down, and touch objects).

As mentioned earlier in the report, the museum gathers information about its audiences and visitors through a small survey kept near the guest book, and tabulates demographic information from visitors to its special events. The museum uses information from the surveys as a recruiting and fundraising tool, sending membership information to local visitors and a fund raising letter

to those who live outside the immediate area. A more extensive survey might result in more information that could be used to drive programming and activities, but this need has to be balanced with the possibility that a longer survey might not be as enticing for a visitor to fill out.

Conducting visitor exit surveys once or twice a year would enable the Museum to develop a continued understanding of the audiences, their needs, and interests—and would be valuable to inform planning. Consider enlisting the aid of a marketing expert from one of the local colleges or universities. This might be a class project or an internship opportunity. Basic questions might include:

- Demographics: Where from, gender, group composition, education, ethnicity, income
- Awareness: Why they came, where they learned about the museum, what media they read/view/listen to (which can inform decisions about how to market to similar people), where they have seen information about the museum
- Prior experience with the Museum: Are they members, have they visited before, how frequently do they visit
- Experience: What they did, length of visit, what liked, what could be improved, rating questions (about store, tour, collections), what they would tell others about their visit
- Front-end research: Questions about current issues or to help set priorities

#### **Recommendations:**

- Obtain samples of surveys offered by local attractions and work with an evaluation specialist (perhaps someone from the school system) to construct a new survey.
- Analyze all programs, past, current, and future, as to their adherence to mission.
- As resources allow, begin developing traveling materials—tabletop exhibits, local history kits, curricular materials—to take the museum where people gather. Such projects are often good candidates for grant funding, particularly where it can be demonstrated that they fill a mandated curricular need.

### **3. Exhibits/Programs**

The museum's educational and interpretive programs fit well with the current staff and financial resources of the museum and fit the focus of the museum. However, to increase audiences, educational goals could be articulated with more precision. By analyzing current programs and activities and determining their fit with the mission, new educational programs could be developed and older ones that don't fit the mission well could be eliminated or reduced, therefore providing more efficiency in how educational goals are achieved. The primary activity for the museum is its docent-led tours, which seem well-received and well-run. This personal touch is a plus for the museum and a good marketing point.

Currently, the museum is limited in its ability to offer new programs and exhibitions, as it does not have much "swing space" in which to offer changing exhibitions or programs for large groups. If the carriage house is renovated, it would offer new potential for the museum to offer changing exhibitions and programs for large groups (as well as a new space that could be rented out for earned income). This would encourage repeat visitation that the museum currently lacks and is striving for.

## **Recommendations:**

- Renovate carriage house as an exhibition and programming space.
- Codify educational goals for the museum and for audiences, current and potential.
- Purchase microphone packs for docents so that they can amplify their voices.
- Create a speakers bureau that could bring the museum to local community groups and schools and encourage visitation.
- Consider creating online exhibitions on special topics. This would offer visitors, local and national, new information about the museum that would keep them returning to the Web site and the museum. Online exhibitions also offer a way of presenting new information even though the museum itself has limited exhibition space. Visit <http://omeka.org> for free software to create online exhibitions.
- Consider creating a walking tour of the neighborhood that stops at the various Brown-related sites in the area. Such a tour would encourage repeat visitors without requiring space in the museum.
- Offer a program that explains a behind-the-scenes view of how a museum is run and explain why there is no eating, drinking, or touching of objects in the museum.
- Consider offering summer programs for students. Week-long day camps are popular, especially for working parents who need to find activities for their children during the summer holidays.
- Consider adding podcasts as an alternative method of touring house and grounds. (see: <http://www.tfaoi.com/aa/5aa/5aa225.htm>) Also, contact X Jones, Director of Education, Why Museum (she discussed how to use students to create podcasts at the Museums R Us conference). Museum professionals are often willing to help their colleagues. Do not be afraid to contact a museum professional whose work you admire.

## **C. Marketing and Public Relations**

The museum is very creative in how it uses its limited resources to promote its goods and services. It uses a combination of billboards, banners, ads, coupons, articles, the Web, railroad listservs, and other methods to promote the museum. An analysis of local visitor materials shows the museum is listed in a wide variety of both Charles County and Utah visitor and tourist publications.

The community's perception of the museum seems to be primarily that once you attend the museum, there is little reason to return. Changing exhibitions and more special programs would give people an incentive to return. As mentioned, the museum offers a membership program but more incentives need to be offered to keep and grow the number of members. Compare prices and benefits to what is offered at other local non-profits.

The museum is aware of the community's perception of the museum and tries a variety of methods to encourage return visitation, such as presenting an event every month, hosting the local Chamber of Commerce reception, and trying new methods of marketing, such as the banner for Main Street, which is a new marketing method this year. The museum does not have a marketing plan, but it would benefit from one being created.

While the museum is located along a major road, the community does not have a public transportation system that will bring people to the museum. Visitors must rent a car or find other

means to access the museum. Better signage and transportation options would enable more people to find and visit the museum.

## **Recommendations:**

### **Materials**

- Look at design of brochures and how they appear in racks. Current designs are not as eye-catching as they could be, especially when only the top 1/3 is on view in a rack. Make sure brochures of museum are regularly stocked at local attractions. Even though it is expensive to change brochures, evaluate the brochures - the cover of the brochure should advertise the museum and be a hook that directs people to the site, its programs, and exhibitions.
- Beef up Wikipedia entry on museum. These can be edited by anyone and it's a great marketing tool.
- Place metatags on internet so that Charles County Historical Society is found easily on a Google search. Link Web site to the Charles County government Web site, Chamber of Commerce, and any other local government and business Web sites, as well as other local attractions.
- Use newsletter as a marketing and fund raising tool. Include lists of items that museum need to be donated (see Juniper House newsletter for a good design and content ideas), surveys that ask members for comments, suggestions, and ideas for fund raising and marketing.
- Newsletter could also invite outside authors to submit articles on historic topics so there is a research piece in each issue.
- Contact local media twice a year to inform them of happenings at the museum. Contact local public radio station for information on public service announcements (often they have to offer it for free to non-profits). Depending on quality of video of house interior, contact local PBS station to see if they will run short clips about the museum.

### **Signage**

- Ask for photograph of museum on display in the Visitor's Center to be labeled so visitors know name of museum and will potentially visit. Similarly, ask that the mural on the flood wall be labeled as well.
- Request additional signage that leads drivers to the museum easily.

### **Transportation**

- Talk with bus tour operators about how to place the museum on sites they visit. ([www.buses.org](http://www.buses.org))
- Investigate public transportation that would bring visitors to the museum.
- Investigate creating a shuttle bus that would bring people close to the site.

### **Networks**

- Contact Utah Bureau of Tourism and see what resources and marketing ideas they might have to offer. Also contact area arts consortiums such as the Arts and Cultural Council. Create a consortium of the local museums, sites, and attractions that meets once a month to share ideas and work on group marketing. Also consider organizing a task force comprising of liaisons between the city, chamber, merchants association, and local attractions to establish specific goals and objectives to improve collaborative marketing. An example of a successful consortium is the Loudoun Heritage Consortium in Virginia.

- Join the Western Museums Association (information available on: [www.westmuse.org/](http://www.westmuse.org/)) – this will give you access to workshops, meetings, conferences, publication, consultants, etc. in the greater area outside that served by the Utah Museums Association  
[www.utahmuseums.org/](http://www.utahmuseums.org/)
- Join Smithsonian Affiliations Program – a good source for resources, including the Visiting Professionals Program, and for the ability to use the Smithsonian logo on marketing materials – very helpful in attracting visitors (information available on: <http://affiliations.si.edu/>)
- Join Museum-L listserv (information available on: <http://home.ease.lsoft.com/scripts/wa.exe?SUBED1=MUSEUM-L&A=1>) – a good place to ask questions and see the issues other museums are asking about
- Contact Historic Landmarks Association of Utah for information on possible grants available, partnerships, marketing opportunities.
- Offer special discounts via the local Visitors Bureau

### **Strategies**

- Contact university business schools and ask if the marketing classes need subjects for class projects. Offer museum as a subject for a marketing project and creation of a marketing plan. Marketing plan should address different needs of audiences – railroad enthusiasts, students, general public, historic house enthusiasts.
- Create a master calendar of marketing and public relations deadlines so that marketing information can be sent in a timely manner to the various tourism publications in order to promote annual events and tours.
- Contact local realtors to see if they would be interested in offering museum memberships to the people they sell houses to. Some realtors offer “welcome” kits to new residents.
- Place two laminated passes at the local library that people can check out and use to come to the museum. Could encourage new visitorship from residents.
- Contact Sheraton hotel concierge and see if a special package or tours can be offered to hotel guests. Hotel could market the tours to guests.
- Ask a local company that excels in marketing to give a marketing workshop to local attractions.
- Create special marketing strategies for audiences such as railroad enthusiasts and historic architecture enthusiasts. Locate Web sites and listservs that offer connections to these groups.
- Buy a copy of Alvin Reiss’ “Cash In! Funding and Promoting the Arts”, Theatre Communications Group, 1986 – excellent source of creative marketing ideas for small non-profits.

### **D. Facilities and Risk Management**

The museum recently installed a ramp and re-configured the back entrance to the museum so that it is more accessible. A fire in 1971 has made the staff conscious of safety issues, and the museum appears as safe as an historic house can be made.

Risk management procedures could be upgraded. The local fire department should be invited to visit once a year to assess the current risks for the mansion, and the museum could write a disaster plan, one of the requirements for accreditation.

The museum is currently investigating the possibility of installing HVAC and fire suppression systems in the house. However, the system, when installed, could take over the mansion’s

basement and attic, which would displace many collections and leave the museum without critical storage space. Outside storage space needs to be researched and planned for. Another possibility is to renovate the carriage house first so that it could serve as storage.

Currently, the museum hosts outside events about twice a year. While preparing for a recent dinner, the dining room table broke and is waiting restoration. While some income could be derived from renting out the house for functions, it seems prudent to use the lawns as the preferred site for functions with carefully controlled tours of the museum. If the carriage house was to be renovated, that space would offer another site for hosting events and thereby creating a new form of earned income.

### **Recommendations:**

- Write a disaster plan – dplan ([www.dplan.org/](http://www.dplan.org/)) is an easy tool that assists in writing a comprehensive disaster plan.
- Write a policy for rentals in the house.
- Investigate HVAC systems and space requirements for the system.
- Investigate outside climate-controlled storage, including the possibility of some of the area museums providing free or low-cost storage space for particularly sensitive objects.

### **E. Human Resources**

The Administrator has a thorough knowledge of her job and the many issues particular to museums. The remaining staff members are part-time, and seem very willing to take on any of the myriad of odd jobs required by a historic house museum. Several volunteers also fill in for other job functions, including a volunteer who maintains the large yard.

Staff seems well trained in serving the museum's audiences and community, and people are flexible in filling in for others. Providing training for staff on proper museum procedures and fund raising would increase their ability to serve the museum, thereby raising their awareness of fund raising and marketing opportunities.

Staff members are encouraged to participate in community activities, but given that many are volunteers or part-time staff members, they do not need to take time away from regular work hours to participate. Board members seem willing to engage others in the community for the benefit of the museum, including one board member who was trained to fund raise for another non-profit in the area so that he would be trained to raise funds for the museum.

One of the greatest challenges facing the museum is that the museum administrator is spread too thin. More staff members are desperately needed for the museum to move to the next level of professionalism. The administrator has done a great job networking with the community and other tourism organizations. This is a tremendous asset to the museum with the potential to bring in more support. However, it is a difficult mission for one person to accomplish alone. Some of the board may function as staff and that is very commendable. Still paid staff and volunteers, no matter how dedicated, have inherently different approaches to their work. The governing board has the primary responsibility of setting policy for the museum and ensuring its financial well-being. The paid staff carries out the wishes of the board in the form of programs, exhibitions, publications, and events. The museum is clearly outgrowing the ability to operate with a single paid staff person.

**Recommendations:**

- Offer fund raising training for all staff and volunteers. Contact the Foundation Center <http://foundationcenter.org/collections/ccut.html> for classes on fund raising.
- Look into the Main Streets program through the National Trust for Historic Preservation. (<http://www.mainstreet.org/content.aspx?page=2530&section=4>)
- Hire more staff from Experience Works as they work with no cost to the museum.
- Find funding for more staff. IMLS grants would fund temporary positions for one or two years, but having more full-time staff would enable some projects to be finished.
- Create a position of volunteer coordinator – someone who organizes and coordinates all volunteers and their activities (can be paid or volunteer position).
- Create a more formal internship program. Actively recruit from local universities and high schools.

**F. Financial Stability**

The museum is in good financial health. It has an endowment for capital expenses and brings in a small but consistent and stable income from tours and special programs. It has many sources of in-kind donations (grounds maintenance, Boy Scouts, and local companies) and does well at attracting volunteer help. The budget does not allow for much growth, however. The current financial position enables the museum to be stable and static, a fund raising program is necessary to maintain the museum and grow into the future.

The museum's current resources serve the audience and community, but a growth in resources would enable the museum to market and publicize itself more and serve the audience and community better.

The museum commissioned a feasibility study about its ability to raise funds for the renovation of the carriage house, which was estimated to cost about \$3 million. The study suggested that instead a \$1 million campaign be started with the intent of installing HVAC and fire suppression systems in the house. These estimates need to be attached to real numbers. If the HVAC system is installed, the museum loses its attic and basement and a cost will be incurred for renting climate-controlled storage space. It is unclear if the \$1 million estimate includes the other associated costs for HVAC installation.

A local foundation has offered the museum a matching grant for the renovations. The museum must raise \$500,000 to receive \$500,000. The museum needs to make the match its top priority.

**Recommendations:****Capital Campaign**

- Investigate exact pricing on HVAC and fire suppression installation.
- Investigate costs of climate-controlled storage and moving costs for moving collections. See if other museums and libraries in the area can offer free or low-cost storage space for collections.
- Contact local construction companies to see if one will provide a lower, non-profit rate on renovating the carriage house, or if an in-kind donation of services be offered.

- Contact local vocational/technical schools to see if the renovation of the carriage house could be a source of training for apprentice carpenters. Under such an arrangement, labor would be free and possibly only the cost of materials would need to be raised.
- Contact local, state, and federal government officials about funding options, for example bond bills or earmarks.
- Locate the list of donors who contributed to museum's renovation after the 1984 fire. Some of these donors could be donors to current campaign.
- Locate information on the local theater group that used to perform in the carriage house. Alumni of those productions are good sources for donations to its renovation.

### **General**

- Contact local book stores to inquire if one would take over running the gift shop. This would place all responsibility in the hands of the store. They could train and hire staff, and maintain the inventory system, with a cut of the profits going back to the museum. This would be similar to many universities who have hired Borders to run their bookstores.
- Ask a CPA to conduct a full audit of the museum's financial statements. At the moment, the financial statement is only a compilation and not a full audit. For funding purposes, a full audit is a good tool for receiving funding. Ask a CPA for a pro bono audit or reduced rate. See if a CPA can be found to become a board member.
- When the carriage house is renovated, use the space for rental income.
- Consider raising membership and tour prices after researching what similar organizations in the area charge.
- Consider selling copies of photographs and other images via the Web. Selling reproductions can be a good source of income. However, the museum would need the ability to scan and digitize images.

### **Fund Raising**

- Use the Chamber of Commerce membership list for potential fundraising.
- Contact local and state arts and humanities councils for information on grants available.
- See if local businesses will allow a donation jar to be placed on check-out counters.
- Place the list of current donors on the Web site for stewardship purposes.
- Start a planned giving program. The most basic way to offer planned giving is to include a sentence or two on all materials saying something like "Remember the museum in your will. Consider a bequest to the museum."
- Create a corporate funding program that offers benefits for the corporate community.
- Contact the National Trust for Historic Preservation (national and state offices) for information on potential funding and grants ideas.  
<http://www.preservationnation.org/resources/find-funding/>
- Contact and research other railroad-focused organizations to view funding sources  
<http://www.railwaymuseums.org/> for example.
- Write a case statement to guide fund raising. The Foundation Center offers many resources ([www.foundationcenter.org](http://www.foundationcenter.org)) and there are many Web sites that offer help on writing a case statement (<http://www.ccfbest.org/fundraising/elementswinningcase.htm>) and (<http://www.techsoup.org/learningcenter/funding/page4752.cfm>) for example.

## More Resources and Bibliography

### Membership

“29 Ways to Get and Keep More Members,” Dana Hines found on Web site, Museum Marketing Tips, [www.museummarketingtips.com](http://www.museummarketingtips.com)

“An Evaluation Tool for Membership Programs” Fact Sheet from AAM Information Center, [www.aam-us.org](http://www.aam-us.org)

### Education

Nancy Crane, Education Program Manager, York County Culture and Heritage Commission, presented information on how her institution partners with schools on educational activities at the 2006 Smithsonian Affiliations conference. Contact her for information and ideas on museum-schools partnerships.

### Risk Management

The Minnesota Historical Society offers a technical leaflet to assist small museums in developing a risk management program (PDF). It includes checklists with essential elements for eight program areas, including insurance, guards, fire protection, security, and locks & keys.

### Writing a Collections Management Policy

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

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

### Interpretation

James Carter, ed., *A Sense of Place: An Interpretive Planning Handbook* (Inverness, Scotland: Tourism and Environment Initiative, 1997), available at <http://www.scotinterpnet.org.uk/pages/resources>

[http://www.4culture.org/heritage/publications/T27\(a\)Interp\\_ Exhibit\\_Strategies.doc](http://www.4culture.org/heritage/publications/T27(a)Interp_ Exhibit_Strategies.doc)

Interpretive Plan for the Annapolis Maritime Museum.

<http://www.annapolismaritimemuseum.org/interpretation-plan.pdf>

### Governance

Richard T. Ingram, *Ten Basic Responsibilities of Nonprofit Boards* (National Center for Nonprofit Boards, now known as Board Source. Board Member Manual, Aspen Publishers, Inc.

*Secrets of Successful Boards*, compiled and edited by Carol Weisman, published by F.E. Robbins & Sons Press, St. Louis, Missouri.

Board Source -[www.boardsource.org](http://www.boardsource.org)

BoardSource increases the effectiveness of nonprofit organizations by strengthening boards of directors through our highly acclaimed consulting practice, publications, tools, and membership program.

Board Café -<http://www.compasspoint.org/boardcafe>

One of the most read and followed newsletters for nonprofit boards, written by Jan Masaoka with contributions from some of the top experts in the field.

### **Museum Operations**

Susan K. Nichols, compiler. *Organizing Your Museum: The Essentials*, AAM Technical Information Service Resource Report 5, Washington, DC: American Association of Museums, 1989.

Thomas Wolf, *Managing a Nonprofit Organization*, New York: Simon and Schuster, 1984.

AAM, *Museums & Consultants: Maximizing the Collaboration*. American Association of Museums, 1996.

### **Museum Standards**

Elizabeth E. Merritt, commentator. *National Standards & Best Practices for U.S. Museums*. American Association of Museums, 2008.

### **Mission**

Gail Anderson, editor, *Museum Mission Statements: Building a Distinct Identity*, Technical Information Series, Washington, DC: American Association of Museum, 1998.

AAM, The Museum Mission Statement: <http://www.aam-us.org/getinvolved/ipam/Museum-Mission-Statement.cfm>

Baldwin, Joan H., and Anne W. Ackerson, eds., *The Importance of Mission in Guiding Museum Practice: Essays from the 2002 series 3x3: Workshops for Museum & Not-For-Profit Leaders*. Museum Association of New York, 2003.

Thinking about what's included in a mission statement:

<http://www.artsmanager.org/strategic/primer/chapter2.cfm>

[http://nonprofitmanagement.suite101.com/article.cfm/writing\\_a\\_mission\\_statement](http://nonprofitmanagement.suite101.com/article.cfm/writing_a_mission_statement)

A nice, simple explanation:

<http://www.tgci.com/magazine/How%20to%20Write%20a%20Mission%20Statement.pdf>

### **Marketing**

Beckwith, Sandra L., *Publicity for Nonprofits: Generating Media Exposure That Leads to Awareness, Growth, and Contributions*, 2006.

Brinckerhoff, Peter C., *Mission-Based Marketing: An Organizational Development Workbook*, John Wiley & Sons, 2<sup>nd</sup> Edition.

Kotler, Neil and Philip Kotler, *Museum Strategy and Marketing: Designing Missions, Building Audiences, Generating Revenue and Resources*, 1998.

McLean, Fiona, *Marketing the Museum*. Routledge, 1997.

Runyard, Sue, and Ylva French, *The Marketing & Public Relations Handbook for Museums, Galleries & Heritage Attractions*. AltaMira Press, 1997.

Stern, Gary J. and Elana Centor, *Marketing Workbook for Nonprofit Organizations, Volume I: Develop the Plan*, 2001.

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Museum Marketing Web site, <http://www.museummarketingtips.com/>  
<http://www.museummarketingtips.com/articles/hwy.html>  
<http://www.museummarketingtips.com/articles/listen.html>  
<http://www.museummarketingtips.com/articles/recruit.html>  
<http://www.museummarketingtips.com/articles/turn.html>

Generic Marketing Plan—it asks lots of great questions.  
<http://www.fullcirc.com/rlc/rlcindex.htm>

### **Audience Evaluation and Research**

AAM Committee on Audience Research & Evaluation: [www.care-aam.org](http://www.care-aam.org)

*Introduction to Museum Evaluation*. Washington DC: American Association of Museums, 1999.

*Audience Research and Evaluation 2005 Directory of Evaluators*. Washington DC: American Association of Museums, 2005.

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### **Exhibitions**

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### **Fund Raising**

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

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

### **Planned Giving**

“Bibliography of Essential Reference Books for Planned Giving Officers” found on Web site, Planned Giving Now for Public Broadcasters, [www.pg-now.org/thingsknow/](http://www.pg-now.org/thingsknow/)

“Starting a Planned Giving Program” found on Web site, National Committee on Planned Giving, [www.ncpg.org](http://www.ncpg.org)

### **General Nonprofit Management**

The Alliance for Nonprofit Management: [www.allianceonline.org](http://www.allianceonline.org)

Free Management Library: [www.managementhelp.org](http://www.managementhelp.org)

Center for Nonprofit Management: [www.cnmsocal.org](http://www.cnmsocal.org)