

CLACKAMAS COUNTY BOARD OF COUNTY COMMISSIONERS

Policy Session Worksheet

Presentation Date: 8/22/17 **Approx. Start Time:** 10:30 AM **Approx. Length:** 30 min.

Presentation Title: Clackamas County Heritage Project Update

Department: Business & Community Services

Presenters: Jennifer Burns, Heritage Project Manager

Other Invitees: Gary Barth, BCS Director

WHAT ACTION ARE YOU REQUESTING FROM THE BOARD?

This is primarily an informational session to familiarize the Board with the work of the Heritage Project Manager. Staff is seeking feedback from the Board on the current direction of the project.

EXECUTIVE SUMMARY:

The Heritage Project Manager is currently working on a survey and assessment of the County's heritage organizations with the goal of determining how the County can assist in their financial sustainability. The heritage organizations include historic sites and museums open to the public, interpretive organizations and historical societies, historic review boards, and genealogical libraries. Their areas of focus include such wide-ranging topics as the importance of the Willamette Falls to the Native populations, Oregon's territorial history, and the state of the art technology involved in motorsports, to name a few. The heritage organizations not only tell the story of the development of Clackamas County, but at many sites the interpretive themes have statewide and national importance. As such, these organizations offer a unique asset to the residents of the County as well as provide a draw for tourists from outside the County.

Many of the heritage organizations are dependent upon volunteers and grant funding. However, grant funding is primarily project based rather than operational. Grants available through the Clackamas County Cultural Coalition (CCCC) and Clackamas County Tourism and Cultural Affairs (CCTCA) have assisted the organizations in funding special projects but do not cover operational expenses that keep the doors open. The reliance on volunteers, especially in front line operations, has resulted in diminished hours of operation and availability to the public. In some cases, the organizations would not be open or exist at all if it were not for the efforts of one or two core volunteers. It is unlikely that all of the heritage organizations would generate enough revenue on their own to be sustainable. Even the larger organizations may face challenges with gaps in their funding as they work to create high-quality visitor experiences.

Currently the County has committed to funding the Heritage Project Manager for two years to assist the heritage organizations in creating a sustainable business model. As

part of developing a long-term proposal for a countywide, collaborative heritage program, the Heritage Project Manager is looking into funding possibilities. At this time, the assumption is that the County's General Fund would not be a sustainable revenue source. As an alternative, some Oregon Counties have proposed funding their heritage assets through levies via either a County Historical Fund (ex. Multnomah Co.) or a Heritage District (ex. Jackson Co.).

FINANCIAL IMPLICATIONS (current year and ongoing):

Is this item in your current budget? YES NO

What is the cost? No additional cost at this time.

What is the funding source? Not identified at this time

STRATEGIC PLAN ALIGNMENT:

- How does this item align with your Department's Strategic Business Plan goals?

As part of community services, BCS provides and promotes economic, informational, educational, and recreational resources and programs for Clackamas County residents, visitors, and business partners so that Clackamas County continues to be a great place to live, learn, visit, work and play.

- How does this item align with the County's Performance Clackamas goals?

Build Public Trust Through Good Government –increasing the financial sustainability of the County's heritage organizations will help them to continue to preserve and interpret the County's rich heritage assets.

Much like the County's goal "to Honor, Utilize, Promote and Invest in our Natural Resources", this project will work to Honor, Utilize, Promote, and Invest in the County's rich heritage resources by expanding recreational opportunities in the form of heritage tourism and preserving these historical treasures for future generations.

LEGAL/POLICY REQUIREMENTS: None at this time.

PUBLIC/GOVERNMENTAL PARTICIPATION:

Opportunities to participate in public forms will come at a later date.

OPTIONS: N/A – Informational session only

RECOMMENDATION: N/A – Informational session only

ATTACHMENTS:

- List of Clackamas County Heritage Organizations
- Article: “The Value of History”
- Cultural Heritage Travelers in Oregon by the Numbers
- Heritage Organization Survey
- Heritage Organization Assessment

SUBMITTED BY:

Division Director/Head Approval _____

Department Director/Head Approval _____

County Administrator Approval _____

For information on this issue or copies of attachments, please contact <u>Jennifer Burns</u> _____ @ ext. 4356
--

Clackamas County Heritage Organizations

Sites (24)	Owner/Operator(s) (29)
Baker Cabin & Pioneer Church	Baker Cabin Historical Society
Canby Depot Museum	Canby Historical Society
Dr. John McLoughlin & Dr. Forbes Barclay Houses	National Park Service McLoughlin Memorial Association
End of the Oregon Trail Interpretive Center	Clackamas Heritage Partners
Francis Ermatinger House	City of Oregon City, Parks & Recreation Friends of the Ermatinger House
Holy Names Heritage Center	Marylhurst University
Iron Worker's Cottage	City of Lake Oswego Lake Oswego Preservation Society
Luscher Farm	City of Lake Oswego, Parks & Recreation
Mark Prairie Schoolhouse	Mark Prairie Heritage
McLean House	City of West Linn Friends of the McLean House
Milwaukie Museum	Milwaukie Historical Society
Molalla Museum Complex	Molalla Area Historical Society
Mt. Hood Cultural Center & Museum	Mt. Hood Cultural Center & Museum
Museum of the Oregon Territory (MOOT)	Clackamas County Historical Society
Oregon Military Museum	Oregon Military Museum
Oregon Municipal Elevator	City of Oregon City
Oswego Heritage House	Oswego Heritage Council
Philip Foster Farm	Jacknife-Zion-Horseheaven Historical Society
Rogerson Clematis Garden	Friends of the Rogerson Clematis Collection
Sandy Historical Society Museum	Sandy Historical Society
Timberline Lodge	Forest Service R.L.K. and Company Friends of Timberline Lodge
Willamette Falls Locks and Museum	US Army Corps of Engineers
William L. Holmes House at the Rose Farm	McLoughlin Memorial Association
World of Speed	World of Speed

Interpretive Organizations / Historical Societies without Sites (9)

- Confederated Tribes of the Grand Ronde
- Curtis Education Center
- Gladstone Historical Society
- Ice Age Floods Institute
- Oak Lodge History Detectives
- West Linn Historical Society
- Willamette Falls Heritage Area Coalition
- Willamette Falls Heritage Foundation
- Wilsonville-Boones Ferry Historical Society

Historic Review Boards (5)

- City of Canby Historic Review Board
- City of Lake Oswego Historic Resources Advisory Board
- City of Oregon City Historic Review Board
- City of West Linn Historic Review Board
- Clackamas County Historic Review Board

Other (6)

- Cascadia Center for Arts & Crafts
Teaching facility focused on historical trades / techniques
- Dark Horse Comics
Private collection with interest in creating a museum
- Historic Oregon City Coordinating Committee
Umbrella organization for Oregon City events
- Molalla Log Building Project
Currently in storage awaiting a site
- Rediscover the Falls
Riverwalk Project incorporating heritage
- Willamette Shore Trolley – Oregon Electric Railway Historical Soc.

Genealogical Libraries (7)

- Clackamas County Family History Society – Wilmer Gardner Research Library at MOOT
- Lake Oswego Family History Center (LDS)
- Milwaukie Family History Center (LDS)
- Molalla Family History Center (LDS)
- Mount Hood Family History Center (LDS)
- Oregon City Family History Center (LDS)
- Wilsonville Family History Center (LDS)

Additional Types of Organizations

The following types of organizations are not currently included in the survey.

- Disbanded Museums/Collections (ex. Estacada Museum)
- Historic Cemetery Organizations
- Historic Neighborhood Associations (ex. McLoughlin Neighborhood Association)
- Parks and Recreation Departments with Interpretive Signage (ex. Lake Oswego's Iron Furnace)
- Preservation-Minded Community Groups (ex. Concord Partnership, Friends of Jennings Lodge)
- Individually designated structures

HISTORY RELEVANCE CAMPAIGN

THE VALUE OF HISTORY

SEVEN WAYS IT IS ESSENTIAL »

TO OURSELVES

- **IDENTITY »** History nurtures personal identity in an intercultural world. History enables people to discover their own place in the stories of their families, communities, and nation. They learn the stories of the many individuals and groups that have come before them and shaped the world in which they live. There are stories of freedom and equality, injustice and struggle, loss and achievement, and courage and triumph. Through these varied stories, they create systems of personal values that guide their approach to life and relationships with others.
- **CRITICAL SKILLS »** History teaches critical 21st century skills and independent thinking. The practice of history teaches research, judgment of the accuracy and reliability of sources, validation of facts, awareness of multiple perspectives and biases, analysis of conflicting evidence, sequencing to discern causes, synthesis to present a coherent interpretation, clear and persuasive written and oral communication, and other skills that have been identified as critical to a successful and productive life in the 21st century.

TO OUR COMMUNITIES

- **VITAL PLACES TO LIVE AND WORK »** History lays the groundwork for strong, resilient communities. No place really becomes a community until it is wrapped in human memory: family stories, tribal traditions, civic commemorations. No place is a community until it has awareness of its history. Our connections and commitment to one another are strengthened when we share stories and experiences.

- **ECONOMIC DEVELOPMENT »** History is a catalyst for economic growth. People are drawn to communities that have preserved a strong sense of historical identity and character. Cultural heritage is a demonstrated economic asset and an essential component of any vibrant local economy, providing an infrastructure that attracts talent and enhances business development.

TO OUR FUTURE

- **ENGAGED CITIZENS »** History helps people craft better solutions. At the heart of democracy is the practice of individuals coming together to express views and take action. By bringing history into discussions about contemporary issues, we can better understand the origins of and multiple perspectives on the challenges facing our communities and nation. This can clarify misperceptions, reveal complexities, temper volatile viewpoints, open people to new possibilities, and lead to more effective solutions for today's challenges.
- **LEADERSHIP »** History inspires local and global leaders. History provides leaders with inspiration and role models for meeting the complex challenges that face our communities, nation, and the world. It may be a parent, grandparent or distant ancestor, a local or national hero, or someone famous or someone little known. Their stories reveal how they met the challenges of their day, which can give new leaders the courage and wisdom to confront the challenges of our time.
- **LEGACY »** History, saved and preserved, is the foundation for future generations. History is crucial to preserving democracy for the future by explaining our shared past. Through the preservation of authentic, meaningful places, documents, artifacts, images, and stories, we leave a foundation upon which future Americans can build. Without the preservation of our histories, future citizens will have no grounding in what it means to be an American.

LEARN MORE » historyrelevance.com

Cultural Heritage Travelers in Oregon by the Numbers

The number	The fact
19.6 billion	Amount of dollars spent by cultural and heritage travelers on their most recent trip to Oregon.
83	Percent of leisure travelers in Oregon who consider themselves cultural and heritage travelers.
47.5 million	Number of people who are cultural heritage travelers within Oregon and its feeder markets.
1,618	Average amount of dollars spent by a cultural heritage traveler on a leisure trip in Oregon. This is nearly 60 percent higher than cultural heritage travelers spend nationally.
45	Percent of Oregonians who spend more on cultural heritage activities while they are on a trip.
39	Percent of travelers will to pay more for lodging that reflects the cultural heritage destination they are visiting.
1,200	Number of cultural heritage organizations in Oregon.

Source: "Oregon Cultural and Heritage Travelers Study, October 2012," by Mandala Research, LLC, a study organized by the Oregon Heritage Commission and paid for with donations to the Oregon Cultural Trust. See www.oregonheritage.org for a copy of the full study.

2017 CLACKAMAS COUNTY HERITAGE ORGANIZATION SURVEY

ORGANIZATION: _____

ID #: _____

INTERVIEWEE: _____

DATE: _____

Q. IF YOU HAD THE RESOURCES TO SUCCEED / BE MORE SUCCESSFUL, WHAT WOULD SUCCESS LOOK LIKE?

Q. HOW DOES YOUR ORGANIZATION CURRENTLY MEASURE PERFORMANCE?

Q. WHAT ROADBLOCKS ARE IN YOUR WAY OF SUCCESS / SUSTAINABILITY?

Q. WHAT AREAS DO YOU NEED ASSISTANCE IN? (CHECK ALL THAT APPLY, AND CIRCLE ANY SUB-CATEGORIES)

- MISSION, VISION, GOVERNANCE:** MISSION, GOV. DOCS, GOVERNING AUTHORITY, ETHICS, SUPPORT GROUPS
- MANAGEMENT:**
FISCAL RESPONSIBILITY, FUNDRAISING, SUSTAINABILITY, FACILITIES, SAFETY & SECURITY, VISITOR AMENITIES,
RISK MANAGEMENT, COMPLIANCE WITH LAWS, CODES, & REGULATIONS, INSTITUTIONAL PLANNING, JOB
PERFORMANCE EVALUATION, RECORDS MANAGEMENT & INSTITUTIONAL ARCHIVES
- AUDIENCE:** MARKETING & PR, AUDIENCE & VISITOR RESEARCH, COMMUNITY RELATIONS, VISITOR SERVICES
- INTERPRETATION:** PROGRAMS, EXHIBITIONS, PUBLICATIONS
- COLLECTIONS:**
POLICIES, MANAGEMENT, PLANNING, INSTITUTIONAL ARCHIVES, CARE & PREVENTATIVE CONSERVATION,
CONSERVATION TREATMENT, RESEARCH, PUBLIC ACCESS, EMERGENCY PREPAREDNESS
- HISTORIC STRUCTURES:**
MANAGEMENT, PRESERVATION, POLICIES, RESEARCH AND DOCUMENTATION, PUBLIC ACCESS, PUBLIC SAFETY
- OTHER:** _____

Q. WHAT CAN THE COUNTY PROVIDE YOUR ORGANIZATION TO BE MORE SUCCESSFUL?

- | | | |
|--|---|---|
| <input type="checkbox"/> STAFF | <input type="checkbox"/> EXHIBIT MATERIAL | <input type="checkbox"/> ECONOMIES OF SCALE |
| <input type="checkbox"/> TRAINING | <input type="checkbox"/> MARKETING | (EX. SUPPLIES, MERCH.) |
| <input type="checkbox"/> SPACE | <input type="checkbox"/> TECH SUPPORT | <input type="checkbox"/> OTHER: _____ |
| <input type="checkbox"/> COLLECTIONS STORAGE | | _____ |

Q. ROLE OF CCHC – HOW CAN A JOINT ORGANIZATION HELP YOUR SITE?

Q. WEBSITE RESOURCES FOR HERITAGE ORGANIZATIONS - WHAT KINDS OF INFO WOULD YOU LIKE TO SEE ON A WEBSITE AND HAVE AVAILABLE TO THE PUBLIC? _____

Q. OUT OF THE BOX IDEAS FOR HERITAGE IN CLACKAMAS COUNTY – HOW TO MAKE IT STRONGER

Q. ADDITIONAL HERITAGE ORGANIZATIONS/GROUPS TO TALK TO?

Q. ANYTHING ELSE YOU WOULD LIKE TO ADD? _____

HERITAGE ORGANIZATION ASSESSMENT

ORGANIZATION INFORMATION

ORGANIZATION NAME: _____

MUSEUM(S) AND/OR SITE(S): _____

SITE(S) ADDRESS(ES): _____

OWNER OF MUSEUM(S) AND/OR SITE(S): _____

MAILING ADDRESS: _____

PHONE: _____ FAX: _____

EMAIL: _____ WEBSITE: _____

YEAR OPENED / BEGUN: _____ 501(c)3 GOVERNMENT ENTITY

ORGANIZATION TYPE:

- | | | |
|---|---|--|
| <input type="checkbox"/> HISTORIC / INTERPRETIVE SITE | <input type="checkbox"/> WALKING TOUR | <input type="checkbox"/> CHAMBER OF COMMERCE |
| <input type="checkbox"/> MUSEUM | <input type="checkbox"/> REVIEW BOARD | <input type="checkbox"/> MAIN STREET |
| <input type="checkbox"/> GARDEN | <input type="checkbox"/> HISTORICAL SOCIETY | <input type="checkbox"/> OTHER: _____ |

INTERPRETATION TYPE:

- | | |
|--|---|
| <input type="checkbox"/> INTERPRETIVE DISPLAYS | <input type="checkbox"/> SECOND-PERSON INTERPRETATION |
| <input type="checkbox"/> GUIDED TOURS | <input type="checkbox"/> THIRD-PERSON INTERPRETATION |
| <input type="checkbox"/> FIRST-PERSON INTERPRETATION | <input type="checkbox"/> OTHER: _____ |

EXECUTIVE DIRECTOR OR SENIOR STAFF MEMBER/ VOLUNTEER: _____

PHONE: _____ CELL: _____

EMAIL: _____ HOURS PER WEEK: _____

BOARD PRESIDENT: _____

PHONE: _____ CELL: _____

EMAIL: _____

NUMBER OF EMPLOYEES: PART-TIME: _____ FULL-TIME: _____

LIST POSITIONS (NOTE STAFF (S) OR VOLUNTEER (V)): _____

NUMBER OF BOARD MEMBERS: _____ HOURS VOLUNTEERED LAST FY: _____

NUMBER OF VOLUNTEERS: _____ HOURS VOLUNTEERED LAST FY: _____

NUMBER OF INTERNS: _____ HOURS VOLUNTEERED LAST FY: _____

TOTAL HOURS VOLUNTEERED LAST FY: _____ VOLUNTEER TIME IN DOLLARS (x \$24.15¹): _____

AFFILIATED ORGANIZATIONS / MEMBERSHIPS: _____

MISSION STATEMENT (OR ATTACH AS SEPARATE DOCUMENT): _____

¹ "The Value of Volunteer Time." *Independent Sector*, 24 May 2017, www.independentsector.org/resource/the-value-of-volunteer-time.

MISSION, VISION, AND GOVERNANCE (MVG)

GOVERNING DOCUMENTS

- MISSION STATEMENT
- VISION STATEMENT
- BY-LAWS
- CODE OF ETHICS
- CONFLICT OF INTEREST STATEMENT
- ORGANIZATIONAL CHART
- JOB DESCRIPTIONS WITH ROLES & RESPONSIBILITIES (BOARD, STAFF, VOLUNTEER)
- STRATEGIC PLAN
- LENGTH OF PLAN: _____
- CURRENT YEAR OF PLAN: _____
- AUDIENCE & COMMUNITY PARTICIPATED IN PLANNING PROCESS

POLICIES

- FINANCIAL
- INVESTMENT
- PERSONNEL (PAID & UNPAID STAFF)
- COLLECTIONS
- CONSERVATION
- EXHIBITION
- INTERPRETATION
- PUBLIC USE & ACCESS
- RIGHTS AND REPRODUCTIONS
- FACILITY RENTAL
- VISITOR SERVICES / CUSTOMER CARE
- SECURITY
- RECORD RETENTION SCHEDULE / STORAGE OF GOVERNING DOCUMENTS (ONSITE & OFFSITE)

GOVERNING AUTHORITY

- REVIEWS ITS OWN COMPOSITION AND TRACKS PERFORMANCE.
- ACTIVELY RECRUITS NEW MEMBERS WITH NEEDED SKILLS AND WHO REFLECT THE INSTITUTION'S AUDIENCES AND COMMUNITY. (TIME, TALENT, MONEY, DIVERSITY).
- COMMITS TO HAVING A GOVERNING AUTHORITY MEMBER WHO HAS FINANCE CREDENTIALS.
- COMMITS TO HAVING A GOVERNING AUTHORITY MEMBER WHO HAS LEGAL EXPERTISE.
- FINANCIAL STATEMENTS UPDATED MONTHLY.
- REVIEWS FINANCIAL REPORT AT EVERY MEETING.
- GOVERNING AUTHORITY MEMBERS COMMIT TO OBLIGATIONS (TIME, MONEY).
- GOVERNING AUTHORITY MEMBERS ARE ENCOURAGED TO MAKE A PERSONAL FINANCIAL CONTRIBUTION.
- ACTIVELY SOLICITS FUNDS FOR THE INSTITUTION.
- ORIENTATION PROVIDED FOR GOVERNING AUTHORITY MEMBERS.
- BOARD MANUAL PROVIDED FOR EACH GOVERNING AUTHORITY MEMBER.
- THE GOVERNING AUTHORITY RECOGNIZES ITS REPORTING REQUIREMENTS, AND ITS RESPONSIBILITY TO ENSURE THE INSTITUTION'S FINANCIAL STABILITY AND SUSTAINABILITY.
- SUCCESSION PLAN FOR FUTURE LEADERSHIP WITHIN THE GOVERNING AUTHORITY AND STAFF.
- CREATES POLICY AND DELEGATES AUTHORITY FOR DAY-TO-DAY OPERATIONS TO LEAD STAFF MEMBER / VOLUNTEER.

RISK MANAGEMENT

- DIRECTORS AND OFFICERS LIABILITY INSURANCE
- BUILDING INSURANCE
- FINE ARTS / COLLECTIONS INSURANCE
- GENERAL LIABILITY INSURANCE
- KEY AUDIT
- IRS, EMPLOYMENT, AND OTHER FORMS AND REPORTS FILED COMPLETELY AND ON TIME.

PUBLICATIONS

- ANNUAL REPORT

MANAGEMENT (MGMT)

FISCAL RESPONSIBILITY

- ADOPTED BUDGET (ATTACH LAST AND CURRENT FISCAL YEAR)
- ANNUAL FINANCIAL STATEMENTS (ATTACH LAST FISCAL YEAR)

BUDGET

FISCAL YEAR:	<input type="checkbox"/> CALENDAR YEAR	<input type="checkbox"/> OTHER: _____
TOTAL REVENUE BUDGET: _____		
EARNED INCOME: _____		GOVERNMENT GRANTS: _____
DONATIONS: _____		NON-GOVERNMENT GRANTS: _____
OTHER: _____		
EARNED INCOME BREAKDOWN:		
DOOR RECEIPTS: _____		GIFT STORE: _____
PROGRAM FEES: _____		RENTALS: _____
MEMBERSHIP: _____		OTHER: _____
SPONSORSHIP: _____		
TOTAL EXPENSE BUDGET: _____		
COLLECTIONS CARE / MGMT.: _____		PR / MARKETING: _____
HISTORIC STRUCTURES / LANDSCAPES: _____		FACILITIES: _____
EXHIBITS: _____		ADMINISTRATION: _____
PROGRAMMING: _____		OTHER: _____
SALARIES: _____		

FUNDRAISING AND LONG-TERM SUSTAINABILITY

- DEVELOPMENT / FUNDRAISING PLAN
- ANNUAL FUNDRAISING EVENT: _____
- MEMBERSHIP PROGRAM
- PLANNED GIVING PROGRAM
- ENDOWMENT (CURRENT VALUE: _____)
- COST/LEVEL: _____
- CURRENT FUNDRAISING STRATEGIES / PROGRAMS: _____

FACILITY CARE AND VISITOR AMENITIES

BUILDING SQUARE FOOTAGE OCCUPIED:		
EXHIBITS SPACE SQ. FT.: _____		COLLECTIONS SPACE SQ. FT.: _____
<input type="checkbox"/> OWNED		<input type="checkbox"/> FACILITY MAINTENANCE PLAN
<input type="checkbox"/> LEASED (ANNUAL RENT: _____)		<input type="checkbox"/> SEASONAL INSPECTION OF BUILDINGS & GROUNDS

INTERNAL CONTROLS FOR PROPER FINANCIAL MANAGEMENT

- SEGREGATION OF DUTIES TO PROVIDE CHECKS AND BALANCES ON ALL FINANCIAL TRANSACTIONS.
- CHECKS WRITTEN IN AN AMOUNT HIGHER THAN ESTABLISHED THRESHOLDS REQUIRE TWO SIGNATURES.
- ANNUAL INDEPENDENT FINANCIAL REVIEW OR AUDIT.

JOB PERFORMANCE EVALUATION

- REGULAR STAFF (PAID & UNPAID) PERFORMANCE EVALUATION
- PERSONNEL MANUAL
- VOLUNTEER MANUAL

AUDIENCE STANDARDS (AUD)

AUDIENCE & VISITOR DATA

- | | |
|---|--|
| <input type="checkbox"/> VISITATION DATA (STARTING YEAR: _____) | <input type="checkbox"/> PROGRAM SURVEYS |
| <input type="checkbox"/> WEBSITE STATS (DATA TRACKED: _____
_____) | <input type="checkbox"/> AUDIENCE DEMOGRAPHICS
DATA TRACKED (EX. AGE, GENDER, RACE,
ZIP CODE, GROUPS, OTHER): _____) |
| <input type="checkbox"/> MEMBERSHIP | TRACKING METHOD (EX. GUESTBOOK, DAILY
VISITOR LOG, OTHER): _____) |
| <input type="checkbox"/> DONOR INFORMATION | |
| <input type="checkbox"/> GENERAL VISITOR SURVEY | |

IN-PERSON ENGAGEMENT (PLEASE ENTER DATA FROM LAST FISCAL YEAR)

EXHIBITIONS CURRENTLY OFFERED (NUMBER):	(PERMANENT: _____ TEMPORARY: _____)
IN-PERSON VISITS: _____	NUMBER OF SCHOOL GROUPS: _____
NEWSLETTER AUDIENCE: _____	NUMBER OF CHILDREN IN SCHOOL GROUPS: _____
PEOPLE SERVED BY EDUCATIONAL PROGRAMS: _____	NUMBER OF PROGRAMS OFFERED: _____

DIGITAL ENGAGEMENT (PLEASE ENTER DATA FROM LAST FISCAL YEAR. ATTACH ANALYTICS BY MONTH)

WEBSITE VISITORS: _____	TWITTER FOLLOWERS: _____
FACEBOOK FANS: _____	TWITTER ACCOUNTS: _____
FACEBOOK PAGES: _____	YOUTUBE VIEWS: _____
	INSTAGRAM: _____
	OTHER: _____

AUDIENCE & VISITOR DATA ANALYSIS

- VISITOR INFORMATION ANALYZED TO DETERMINE TRENDS AND VISITATION PATTERNS.
- VISITOR INFORMATION ANALYZED TO GAUGE INTEREST IN PROGRAMS/EXHIBITS.
- THE INSTITUTION REVIEWS FEEDBACK FROM AUDIENCES THAT PARTICIPATE IN ITS PROGRAMS AND ACTIVITIES.
FEEDBACK METHOD: _____

VISITOR SERVICES

- | | | |
|---|---|---|
| <input type="checkbox"/> EXHIBITS (STATIC) | <input type="checkbox"/> PUBLICATIONS | <input type="checkbox"/> FOOD |
| <input type="checkbox"/> EXHIBITS (INTERACTIVE) | <input type="checkbox"/> WEBSITE | <input type="checkbox"/> WI-FI |
| <input type="checkbox"/> VIDEO CONTENT | <input type="checkbox"/> SOCIAL MEDIA CONTENT | <input type="checkbox"/> SEATING AREAS |
| <input type="checkbox"/> RESEARCH LIBRARY | <input type="checkbox"/> MUSEUM STORE | <input type="checkbox"/> ROADWAY / DIRECTIONAL
SIGNAGE |
| <input type="checkbox"/> TOURS | <input type="checkbox"/> RENTAL SPACE | <input type="checkbox"/> BUS PARKING |
| <input type="checkbox"/> PROGRAMS | <input type="checkbox"/> RESTROOMS | <input type="checkbox"/> TELETALES SIGNAGE |
| <input type="checkbox"/> EVENTS | <input type="checkbox"/> WATER | |

VISITOR INFORMATION

- POSTED OPERATIONAL DAYS / TIMES OPEN TO THE PUBLIC: _____
- ADMISSION CHARGED & LEVELS: _____
- VOICEMAIL WITH HOURS OF OPERATION
- WEBSITE WITH BASIC VISITOR INFORMATION (HOURS, LOCATION, CONTACT INFO.)
- FRONT DESK STAFF/VOLUNTEERS TRAINED IN CUSTOMER SERVICE

AUDIENCE STANDARDS (AUD) CONTINUED

COMMUNITY RELATIONS

Q HOW DOES THE INSTITUTION RESPOND TO DEMOGRAPHIC, ECONOMIC, SOCIAL, AND POLITICAL CHANGES IN THE COMMUNITY AND REGION? _____

Q WHAT OTHER GROUPS IN THE COMMUNITY DOES THE INSTITUTION WORK WITH? _____

THE FACILITY IS AVAILABLE FOR COMMUNITY MEETINGS AS APPROPRIATE.

MARKETING AND PR METHODS

- | | |
|---|--|
| <input type="checkbox"/> NEWSLETTER | <input type="checkbox"/> SOCIAL MEDIA (FACEBOOK, TWITTER, OTHER) |
| <input type="checkbox"/> PRESS RELEASE | <input type="checkbox"/> EMAIL DISTRIBUTION LIST |
| <input type="checkbox"/> MEDIA | <input type="checkbox"/> OTHER: _____ |
| <input type="checkbox"/> WEBSITE | _____ |
| <input type="checkbox"/> BROCHURE / RACK CARD | |

MARKETING AND PR TOOLS

- | | |
|--|--|
| <input type="checkbox"/> LOGO | <input type="checkbox"/> PRESS / PUBLICATION PHOTOS |
| <input type="checkbox"/> STATIONARY | <input type="checkbox"/> MARKETING PLAN |
| <input type="checkbox"/> BUSINESS CARDS | <input type="checkbox"/> MEDIA POLICY |
| <input type="checkbox"/> CONSISTENT BRANDING | <input type="checkbox"/> ASSIGNED SPOKESPERSON / PRESS CONTACT |

DESCRIPTION OF ORGANIZATION (25 TO 75 WORDS):

INTERPRETATION (INT)

PROGRAMS, EXHIBITIONS, PUBLICATIONS**GEOGRAPHIC AREA COVERED:** _____**PERIOD OF SIGNIFICANCE:** _____**MAJOR THEMES:** _____**EXHIBITS**TEXT WRITTEN: IN-HOUSE CONTRACTED OUTEXHIBIT FABRICATION: IN-HOUSE CONTRACTED OUT**INTERPRETIVE CONTENT**

- EXHIBITION PLAN
- INTERPRETIVE PLAN
- THE ORGANIZATION IS INVOLVED IN THE CURRENT ISSUES AND ACTIVITIES OF ITS COMMUNITY SO THAT ITS PROGRAMS AND OFFERINGS ARE RELEVANT.
- UTILIZES ADVISORY COMMITTEES OR FOCUS GROUPS.
- USES CURRENT SCHOLARSHIP AND APPROPRIATE HISTORICAL METHODS.
- ACTIVELY SEEKS OUT NEW AUDIENCES AND INCLUDES THEM IN DEVELOPING CONTENT.
- SEEKS ASSISTANCE FROM SCHOLARS AND KNOWLEDGEABLE SPECIALISTS.
- EDUCATIONAL PROGRAM DEVELOPED USING STATE STANDARDS AND CURRICULUM GUIDELINES.

INTERPRETIVE METHODS / TECHNIQUES

- USES A VARIETY OF PRESENTATION TECHNIQUES
 - EXHIBIT LABELS
 - SIGNAGE
 - INTERACTIVE DISPLAYS
 - PRINTED MATERIALS
 - DEMONSTRATIONS
 - ELECTRONIC MEDIA
 - PERFORMANCES
 - EDUCATIONAL PROGRAMS
 - OTHER: _____
- OFFERS A VARIETY OF PROGRAMS AND EXHIBITIONS THAT APPEAL TO DIFFERENT AGES AND INTERESTS.
- DEVELOPS DIFFERENT PROGRAMS AND EXHIBITIONS THAT SUIT DIFFERENT LEARNING STYLES.
- PROVIDES MATERIAL / TEXT IN SECONDARY LANGUAGE(S).
LANGUAGES: _____
- ADA ACCESSIBLE

DOCENTS

- DOCENT MANUAL
- DOCENT TRAINING PROVIDED

EVALUATION CONDUCTED

- FRONT-END FORMATIVE REMEDIAL SUMMATIVE

PROGRAMS

ANNUAL PROGRAMS: _____

STEWARDSHIP OF COLLECTIONS (COLL)

POLICIES

- | | |
|--|---|
| <input type="checkbox"/> COLLECTIONS ARE APPROPRIATE TO MISSION | <input type="checkbox"/> ALL LOANS ARE FOR A SPECIFIED TIME PERIOD. |
| <input type="checkbox"/> CRITERIA FOR ACCEPTING & REFUSING ITEMS | <input type="checkbox"/> PROCEDURES FOR DEACCESSION & DISPOSAL |
| <input type="checkbox"/> INCOMING LOAN POLICY | <input type="checkbox"/> CONTROLLED ACCESS TO COLLECTIONS |
| <input type="checkbox"/> OUTGOING LOAN POLICY | <input type="checkbox"/> PROVIDES PUBLIC ACCESS TO COLLECTIONS |

MANAGEMENT

- COLLECTIONS PLAN
- DESIGNATED STAFF / VOLUNTEER RESPONSIBLE FOR COLLECTIONS
- COLLECTIONS INVENTORY PROCEDURE (LAST PERFORMED: _____)
- COLLECTIONS REGISTRATION AND CATALOGING SYSTEM
METHOD / PROGRAM: _____
- NUMBERING / LABELING SYSTEM FOR HANDS-ON COLLECTIONS
- COLLECTIONS REVIEWED TO IDENTIFY THOSE COLLECTIONS TO WHICH LAWS AND REGULATIONS APPLY (EX. NAGPRA).
- THE INSTITUTION HAS IDENTIFIED THE LEGAL STATUS OF EACH ARTIFACT AND ARCHIVAL ITEM.
- BACK-UP COPIES OF COLLECTIONS RECORDS STORED OFFSITE.

COLLECTIONS STATS

COLLECTIONS:	TOTAL: _____	ADDED IN LAST FY: _____
OBJECTS:	TOTAL: _____	ADDED IN LAST FY: _____
LIBRARY VOLUMES:	TOTAL: _____	ADDED IN LAST FY: _____
ARCHIVAL CUBIC FEET:	TOTAL: _____	ADDED IN LAST FY: _____
OBJECTS DIGITIZED:	TOTAL: _____	ADDED IN LAST FY: _____
ABANDONED PROPERTY:	TOTAL COLLECTIONS: _____	TOTAL OBJECTS: _____
FOUND-IN-COLLECTIONS:	TOTAL OBJECTS: _____	

COLLECTIONS STORAGE:

- | | |
|---|--|
| <input type="checkbox"/> DESIGNATED SECURED STORAGE AREA | <input type="checkbox"/> INSTITUTIONAL ARCHIVE |
| <input type="checkbox"/> CLIMATE CONTROLLED (TEMP. / REL. HUMIDITY) | <input type="checkbox"/> LOCATED OFFSITE |
| <input type="checkbox"/> LIGHT CONTROLLED | <input type="checkbox"/> LOCATED ONSITE |

COLLECTIONS CARE AND PREVENTIVE CONSERVATION

- | | | |
|---|--|--|
| <input type="checkbox"/> ENVIRONMENTAL CONDITIONS MONITORED IN EXHIBITION AREAS | | |
| <input type="checkbox"/> LIGHT | <input type="checkbox"/> TEMPERATURE | <input type="checkbox"/> RELATIVE HUMIDITY |
| <input type="checkbox"/> INSTITUTION MONITORS & CONTROLS PESTS | <input type="checkbox"/> EMERGENCY PREPAREDNESS PLAN | |
| <input type="checkbox"/> ARCHIVAL STORAGE MATERIAL USED | <input type="checkbox"/> DISASTER KIT(S) | |
| <input type="checkbox"/> ARCHIVAL EXHIBIT MATERIAL USED | <input type="checkbox"/> STAFF & VOLUNTEERS TRAINED IN HANDLING COLLECTIONS | |
| <input type="checkbox"/> HOUSEKEEPING PLAN | <input type="checkbox"/> FOOD, DRINK, & PLANT MATERIALS LIMITED TO SPECIFIC AREAS. | |
| <input type="checkbox"/> HOUSEKEEPING TRAINING PROGRAM | | |
| <input type="checkbox"/> CONDITION REPORTS | | |

CONSERVATION TREATMENT AND DOCUMENTATION

- CONSERVATION PROJECTS CONDUCTED ONLY UNDER THE GUIDANCE OF A PROFESSIONALLY TRAINED CONSERVATOR.
- MAINTAINS RECORDS OF ALL CONSERVATION TREATMENTS

STEWARDSHIP OF HISTORIC STRUCTURES AND LANDSCAPES (HSL) (AASLH SPECIFIC)

POLICIES

- HISTORIC STRUCTURES AND LANDSCAPES OWNED /MANAGED BY THE INSTITUTION ARE MISSION APPROPRIATE.

PRESERVATION

- CONDUCTS APPROPRIATE AND ROUTINE MAINTENANCE AND HOUSE- / GROUNDS-KEEPING.
- THE INSTITUTION USES AN INTEGRATED PEST MANAGEMENT PROGRAM FOR ITS HISTORIC STRUCTURES AND LANDSCAPES.
- ALL BUILDINGS AND STRUCTURES ARE INSPECTED ANNUALLY.
- THE INSTITUTION USES APPROPRIATE PROFESSIONAL TREATMENTS AND MATERIALS IN THE CARE OF ITS HISTORIC STRUCTURES AND LANDSCAPE FEATURES.
- QUALIFIED PROFESSIONALS ARE CONSULTED BEFORE PLANNING OR BEGINNING WORK ON STRUCTURES OR LANDSCAPES.
- THE INSTITUTION DOCUMENTS ALL TREATMENTS.
- THE INSTITUTION HAS, AND USES, AN UP-TO-DATE EMERGENCY / DISASTER PLAN.

RESEARCH AND DOCUMENTATION

- THE INSTITUTION HAS COPIES OF, AND UNDERSTANDS, ALL LEGAL DOCUMENTS RELATED TO THE PROPERTIES IT MANAGES OR OWNS.
- THE INSTITUTION HAS AN ESTABLISHED SYSTEM FOR ACCESSIONING, DOCUMENTING, AND CATALOGING PORTIONS OF HISTORIC STRUCTURES THAT MIGHT BE REMOVED FOR REPLACEMENT-IN-KIND.
- QUALIFIED PROFESSIONALS ARE ENGAGED TO RESEARCH AND DOCUMENT THE HISTORIC STRUCTURES AND LANDSCAPES.

HISTORIC BUILDINGS:

BUILDING	YEAR BUILT	ARCHITECTURAL STYLE	LANDMARK STATUS (CITY, COUNTY, STATE, NATIONAL)

ORIGINAL LOCATION (IF MOVED):

BUILDING	ORIGINAL SITE

HISTORIC REVIEW BOARDS:

NUMBER OF DESIGNATED PROPERTIES:

TOTAL: _____ ADDED IN LAST FY: _____