

Professional Development Workshop:
*Surviving and Thriving
within a Parent Institution*

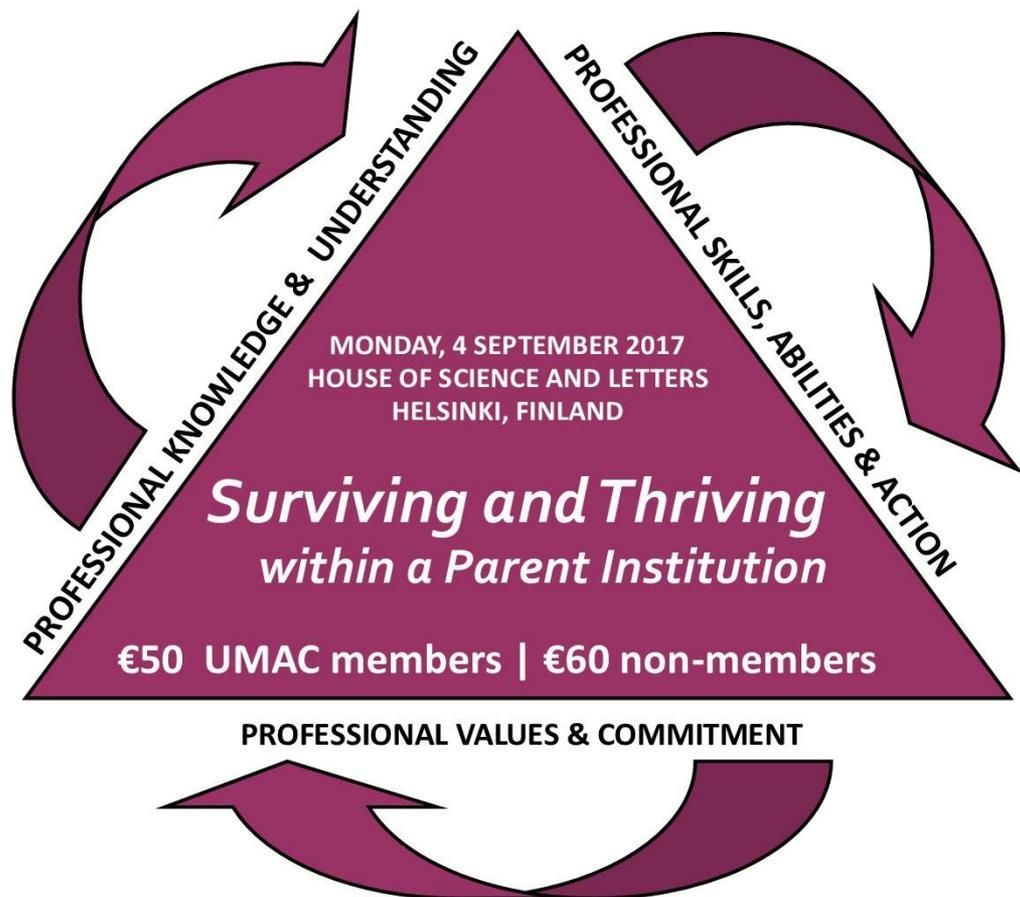
Monday, 4 September 2017
Helsinki, Finland

Supported by ICOM Special Projects



PROFESSIONAL DEVELOPMENT WORKSHOP

This one-day workshop will examine the importance of aligning the museum/ collection's mission with the university (parent institution) mission and help you evaluate the museum/collection's strategic plan and educational role within the university structure. The workshop is applicable to museum and collection professionals of all levels of experience.



Morning

Mission

Governance

Strategic Planning

Afternoon

Collections Planning

Educational Role

Breakout Discussions

10 - 10:30 am

Welcome

Review of Expectations & Schedule

What do YOU want to learn?

What are your greatest challenges?

Breakout session topics

A little about us, your presenters



Jill Hartz, President Emerita, AAMG
Executive Director
Jordan Schnitzer Museum of Art
University of Oregon, Eugene



Barbara Rothermel, Vice Chair, UMAC
Director of the Daura Gallery
Associate Professor of Museum Studies
Lynchburg College, Virginia

Now, a little about you: Why are you here?

Mission

10:30 – 11 am

- Affirm educational role on campus
- Identify core constituents
- Align with parent institution's mission
- Off-campus/public service role?
- Mission documents may include vision, guiding principles, and more
- Are there other museums on campus?
If so, how do your missions connect?
- Review regularly; include others

What is your parent institution's mission?

Does your mission clearly support it?

Is your mission valued by your parent institution?

Can you and your staff remember your mission and repeat it to others without difficulty?

What other mission-related documents do you have/need?

Questions and Discussion

Our Vision for the JSMA

VISION

We will become one of the finest university art museums in the world.

BELIEF

We believe that knowledge of art enriches people's lives.

MISSION

The Jordan Schnitzer Museum of Art enhances the University of Oregon's academic mission and furthers the appreciation and enjoyment of the visual arts for the general public.

Our Constituents

The Museum's primary constituents are the University of Oregon's students, faculty and staff as well as regional residents and visitors. Our varied activities extend our service to an even wider audience of scholars, artists, collectors, critics, and museum professionals.

Guiding Principles

- The museum experience enriches people's lives.
- We contribute to the education of university students and help them become culturally competent global citizens.
- We recognize our visitors' different learning styles and the needs of a multigenerational and diverse audience.
- Our visitors have enjoyable museum experiences that make them want to return.
- Our collections, programs, and research are of the highest quality.
- We follow the highest ethical, academic, and professional standards.

- We find collaborative opportunities on- and off-campus that make the Museum central to learning and build diverse audiences.

KEY STRATEGIES

Programs

The Museum presents stimulating, innovative and inclusive programs and exhibitions that enhance the academic curriculum, emphasize cross-cultural understanding, provide broad education experiences, and support collaborative and interdisciplinary opportunities on- and off-campus. Ongoing evaluation measures how effectively the Museum's program goals are being realized.

Collections

The Museum collects, preserves, studies, exhibits, and interprets works of art for the benefit of the University of Oregon curriculum and for the enrichment of the general public. The JSMA is dedicated to strengthening its Chinese, Japanese, Korean, American and Pacific Northwest art collections and to acquiring fine examples from the history of art, from earliest times to the present, representing cultures throughout the world.

Research & Publications

The Museum supports high-quality research on its collections and programs by its staff, University of Oregon faculty, students and others who use its resources. Research is made accessible through teaching, exhibitions, programs, publications, and online.

Funding & Development

The University allocates funds for staff, operations, security, and facility maintenance to the greatest extent possible.

The Museum raises revenue for all programs not covered by the university's general fund from diverse sources, including earned income, individuals, foundations, corporations, and local, state, and federal grants agencies. The Museum is committed to a balanced budget model.

The Leadership Council is a key support group, raising money and advocating for the Museum.

Communications & Marketing

Internal communications are proactive, direct, and honest, aiming for transparency and inclusivity by and among all University of Oregon staff and volunteers. External communications represent the full range of Museum functions and services and are proactive, direct, and engaging, while delivering a clear, consistent message.

Visitor Experience

The Museum aims to provide consistently high-quality programs and customer service that enhance visitors' on-site and online experiences, leading to ongoing engagement with the Museum.

Facilities

The Museum performs effective and efficient maintenance for the overall care of the Museum facilities, including following preventative maintenance schedules, conducting timely HVAC/mechanical and equipment inspections, and other

related work. The Museum ensures that exhibition and work areas are clean and maintained at the highest standard possible and that detailed condition reviews and reports are completed on a regular basis.

Risk Management

The Museum develops, implements, and monitors preventative measures and intervention plans and maintains a comprehensive security program for minimizing risk to the collections, human life, and the Museum facility at all times, during regular operations and from unexpected threats and emergencies.

Management & Governance

The Museum employs strong, competent leadership that is financially prudent, encourages achievement, and measures performance against standards of excellence. The university's administration and the Museum's Leadership Council are supportive and informed advocates of the Museum.

The Executive Director and senior staff are responsible for developing, implementing, reviewing, and revising the long-range plan with input from the Museum's constituents, including the Leadership Council.

Human Resources

The JSMA employs and trains competent staff and volunteers who strive for excellence. The Museum supports diversity training and professional advancement opportunities for its staff and volunteers and provides training opportunities for students interested in the museum profession. The

Museum follows the university's human resources procedures, including annual evaluations.

Ethics, Academic & Professional Standards

The Museum, its employees, and volunteers adhere to the highest standards of the university and the American Alliance of Museums in all that they do on behalf of the Museum. This commitment is realized in the Museum's commitment to maintaining its accreditation from the American Alliance of Museums.

Leadership Council & Support Groups

The Leadership Council serves as the Museum's primary advisory and fundraising body of volunteers and helps to ensure the Museum's artistic quality, educational integrity, and financial strength. Museum members, Exhibition Interpreters, and other support groups are integral to the Museum's ability to fulfill its mission.

DAURA GALLERY STRATEGIC PLAN

The Daura Gallery is a teaching museum that supports the mission of Lynchburg College through the collection, care, interpretation, and exhibition of works of art and artifacts of world cultures.

VISION : The Daura Gallery will be a teaching museum with a premier collection and programs designed to complement, support, and challenge the academic experience of Lynchburg College students and reflect the core value of Lynchburg College.

MISSION : The Daura Gallery serves Lynchburg College and the community beyond by providing opportunities for learning, enjoyment, and personal growth, by strengthening the creative and curricular life of the College, and by encouraging the interdisciplinary affiliation of the visual arts with diverse academic disciplines.

CONSTITUENTS : The Daura Gallery's primary constituents are Lynchburg College's students, faculty and staff, as well as regional residents and visitors. Our varied activities extend our service to an even wider audience of scholars, artists, collectors, and museum professionals.

GUIDING PRINCIPLES :

- The Daura Gallery experience enriches people's lives.
- The Daura Gallery contributes to the education of college students and helps them become culturally aware global citizens.
- The Daura Gallery recognizes visitors' different learning styles and the needs of a multigenerational and diverse audience.
- The Daura Gallery seeks collections of the highest quality.
- The Daura Gallery follows the highest ethical, academic, and professional standards.
- The Daura Gallery finds collaborative opportunities that make the museum/gallery central to learning and building of diverse audiences.

STRATEGIC PLAN : The Daura Gallery's Strategic Plan provides inspiration and aspiration, and drives resources that make the Daura Gallery valued by and valuable to Lynchburg College. Goals are developed in keeping with the College's institutional goals:

- to enhance student experiences through the development of academically-linked programs;
- to strengthen the sense of community within Lynchburg College through specific programs, facilities and activities;
- to enhance the living and cultural life and the fine and performing arts of Central Virginia.

EXHIBITIONS & PROGRAMS : The Daura Gallery presents stimulating, innovative, and inclusive programs and exhibitions that enhance the academic curriculum, emphasize cross-cultural understanding, provides broad educational experiences, and supports collaborative and interdisciplinary opportunities.

COLLECTIONS : The Daura Gallery collects, preserves, and studies works of art of intrinsic artistic or historic value, demonstrate high standards of craftsmanship, and represent a consistently high quality. The Daura Gallery works to comply with museum standards through facilities upgrades and storage systems, and the implementation of collections management, preservation, and conservation.

FUNDING : Both the College and the Daura Gallery endowment allocate funds for staff, operations, exhibitions and programs, security, and facility maintenance. The Gallery raises additional revenue from annual membership in the Friends of the Daura Gallery, and funding from foundations, corporations, and grants agencies. Funding from these sources are used for exhibitions, programs, conservation treatment, and the implementation of standards of excellence.

EDUCATIONAL OUTREACH : The Daura Gallery develops and institutes meaningful educational programs and offers meaningful children's workshops in conjunction with exhibitions.

COMMUNICATIONS : Communications are proactive, direct, honest, and engaging, aiming for transparency and inclusivity by and among all constituents. Communications represent the full range of Daura Gallery functions and services.

FACILITIES : The Daura Gallery performs effective and efficient maintenance for the overall care of the Gallery, and works with the Physical Plant for housekeeping and HVAC/mechanical operations. The Gallery ensures that exhibition and work areas are clean and maintained at the highest standards.

ETHICS, ACADEMICS & PROFESSIONAL STANDARDS :

The Daura Gallery and its employees adhere to the highest academic, ethical, and professional standards of the College and the American Association of Museums in all they do on behalf of the Gallery. Professional development is achieved through participation in workshops, seminars, conferences and museum-sponsored events. The College's administration and Advisory Council are supportive and informed advocates of the Gallery.

Governance

To Whom Do You Report?

11 – 11:30 a.m.

- *Know Professional Practices!*
- Director should report to highest academic office
- Reflects mission to support all curricula
- Dean's level appointment
- Could be academic faculty rank, but must be a museum professional
- Manage up and down; you never know who will leave, who will be promoted
- Don't assume anyone outside of the museum knows what you do and why it's important

Build Relationships

Find Opportunities for Engagement

- Invite senior leadership to all major events; give them speaking roles, prepare remarks that enforce messages.
- Consider how to involve spouses effectively.
- Encourage use of museum as welcome center for new students, faculty, staff, university supporters.
- Position museum as connection between town-gown, the academy and the public.
- Figure out how to get major supporters of parent institution involved and they will make your case.
- Get to know president's chief of staff and find mentors and advisors in senior leadership.
- Avoid surprises.
- Thank them often!

Governance:

Staffing, Budget, Facility

- What % of your budget comes from your parent institution?
- Do you have private donors? Do you need private donors?
- Is your facility/collection maintained well? Who pays for that?
- What kind of security do you have? Who manages that?
- What is your staffing structure?

Questions & Discussion

BREAK

11:30 – 11:45 am

Strategic Planning

11:45 am – 12:30 p.m.

- Why do strategic planning?
- How does it differ from a business plan or an action plan?
- How do you create an effective strategic plan?
- Who should be involved?
- Remember: University priorities are your priorities.

Jordan Schnitzer Museum of Art

Strategic Plan 2016-19

- *Bridging Cultures* affirms the value of the museum's collections and exhibition program and directs those activities. Through the acquisition, research, and presentation of works of art from cultures and periods across the world, the JSMA shares and extends our understanding of human history, builds discipline-based and interdisciplinary competencies, and helps to instill cross-cultural appreciation in students so they can become productive, insightful, and sophisticated global citizens.
- *Engaging Communities* assures that the museum strives to be deeply relevant to our diverse on- and off-campus communities. Through ongoing evaluation, innovative practice, and the input of its staff, volunteers, and constituents, the JSMA revises, refines, and creates new programs and ways of operation that advance educational goals and address societal needs.
- *Learning Together* activates the museum's role in both learning from others and offering effective methodologies and practices to instill a love of learning and the visual arts in our diverse constituents. It addresses our unique role as a teaching museum; as an innovative center for experiential learning, especially for UO students; and as a provider of arts education and teacher training, which strengthens academic performance and self-esteem in K-12 schools throughout our state.
- *Sustaining Tomorrow* identified and aims to secure the resources and growth required for a strong, practical, and yet visionary future.

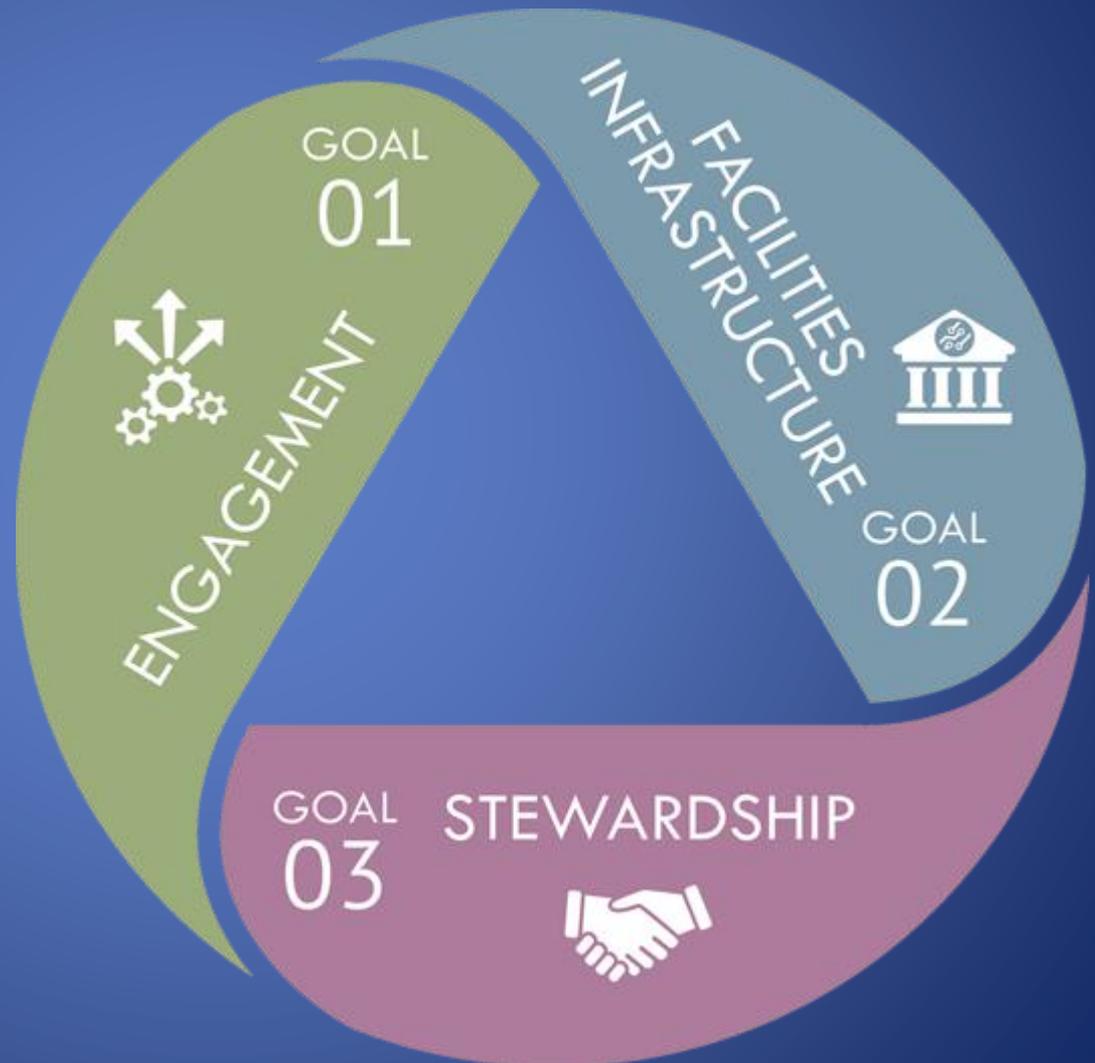
Lynchburg College Vision 2020

Engagement: Lynchburg College will be nationally recognized as a leader for student engagement inside and outside of the classroom, in athletics, and in leadership.

Facilities & Infrastructure: The College will modernize and enhance campus facilities and strengthen its technology infrastructure utilizing both the space study report and the strategic objectives of Vision 2020.

Stewardship: The College will build a culture of philanthropy by engaging students, alumni and friends in the life, work and support of the institution.

How will the Daura Gallery meet the College's goals through strategic planning?



UMAC Bootcamp: 15 minute survey

My mission is:

Consider your primary goals. On each of the following pages, list one goal and answer the following questions:

Goal:

- 1. How does it support your mission?**
- 2. When can you get it done (e.g., 1, 2, 3 years or more)?**
- 3. What resources do you need to get it done?**
- 4. Do you have those resources?**
- 5. Who is responsible for getting it done?**
- 6. Who else needs to be part of the project to get it done?**
- 7. Does that person/team have time to do it?**
- 8. How will you evaluate its success?**
- 9. Who would most like to see this goal completed?**
- 10. If you do succeed, what would be the next step?**

Survey & Share

- **Next 15 minutes: Complete the worksheets for each of your goals**
- **Next 15 minutes: Share one goal and your answers**

Questions and Discussion

LUNCH BREAK

[a light lunch is served]

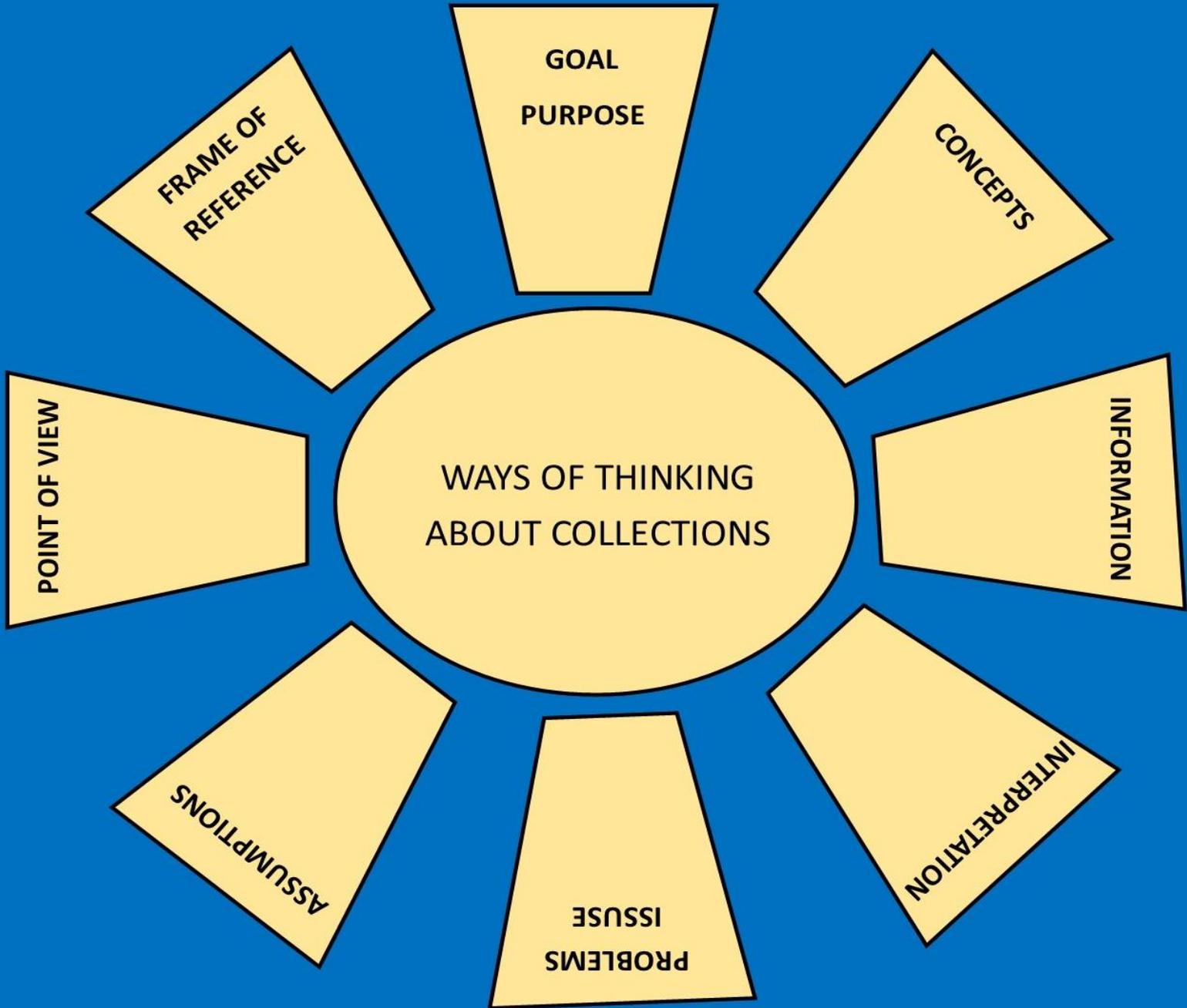
[continue discussions about your goals]

PLEASE RETURN BY 1:30 PM

Collections Planning

1:30 – 2:15 pm

- Historically, the first function of museums was that of collection, and collection remains the predominant reason for many museum's existence.
- Museums preserve objects of artistic, historical, and scientific importance for the enlightenment and enjoyment of present and future generations.
- Most museums collect because they believe that objects are important and evocative survivals of human civilization worthy of careful study that possess powerful educational impact.



The Need for a Plan

- The decision establishing the scope of the museum's collections is probably the most important one that the governing board can make.
- In making a plan, the museum should first of all consider its mission, and outline the scope of the collection need to fulfill its mission succinctly but clearly.
- The relevance of a museum's collections is in the educational potential and exhibition value. Both demand research.

- Pre-determined guidelines will help decide whether objects are of value to the museum.
- Define the scope of the collection (e.g., Renaissance paintings, fossils from the Paleolithic era, scientific instruments from France).
- Identify the determining factors of acquisition, accession, de-accession, disposal.
- The museum should proceed cautiously and adhere scrupulously to the collection plan and conditions under which objects are acquired.

Guidelines for Collecting

- Scope
- Legal Title
- Documentation
- Safety and Security
- Ability to care for
- Potential Use
- Duplication
- Condition
- Public Relations
- Relevance
- Special Considerations

Collection Objects to be Eliminated

- Lie outside the defined scope of the museum
- Are not significant and cannot be used for research, education, or exhibition
- Are so badly damaged or deteriorated that they are of little or no use
- Would accomplish more good in another museum
- Are duplicated many times

The Plan

- Mission Statement
- Ownership of Collections
- Description of Collections
- Collection Strategy
- Role of Collections Committee
- Accession Policy & Procedures
- De-Accession Policy & Procedures
- Study Collection
- Access to Collection
- Academic Partnership
- Rights of Reproduction
- Abandoned Property / FIC
- Loans
 - Incoming
 - Outgoing
 - Campus
- Collection Care
 - Handling
 - Environment
 - Lighting
 - Conservation
 - Pest Management
 - Storage
 - Security
- Collection Documentation
 - Inventory
 - Record-Keeping
 - Risk Management

Records

- Museum collections lose much of their value if they are not properly recorded and documented.
- Collection records should include:
 - object or specimen files
 - records of exhibitions and installations
 - correspondence, legal documents
 - photographs and publications
 - appraisals and insurance value
 - purchase or donation records
 - provenance information
 - research data
- Collections records should be archived in both printed (paper) and digital formats.

Documentation & Research

- The museum must do more than just identify and show what they have collected.
- Collections must be studied in depth and interpreted, including materials and techniques.
- Research is the basis for all exhibitions, educational programs, and publications.
- Research creates knowledge.

Research : Be a Detective

Sherlock Holmes and the Blue Carbuncle



Clues:

Man was intellectual
Decline of fortune
Moral retrogression
Foresight
Recent haircut
Uses lime-cream
Goes out little
Wife stopped loving him
Out of training
No gas in house

Reasoning:

Cubic capacity of hat
Hat is older, but of best quality
Broken elastic not replaced
Hat securer as precaution
Clean cut hair in lower lining
Smell of hat lining
House dust, not grey street dust
Hat hasn't been brushed
Moisture from perspiration in hat
Wax stains from candlelight

Authenticity vs. Fake, Fraud, Forgery, Copy

- In considering acquisitions to the collections, the museum must be on guard against forgeries and fakes. Authenticity and attribution should be subjected to scientific, historic, and stylistic analysis.
- Authentic: having the origin supported by unquestionable evidence.
- Fake: something made or manufactured to deceive.
- The accomplice to a fake is fraud and forgery.
 - Fraud: deceit, trickery, or breach of confidence, perpetrated for profit or to gain some unfair or dishonest advantage.
 - Forgery: the production of a spurious work that is claimed to be genuine; the crime of falsely making or altering, by which the legal rights or obligations are affected.
 - Copy: an imitation, reproduction, or transcript of an original.
 - “The victim is a victim, but may not know it.”
(Secretary General, Interpol International)
- Can you authenticate the collection/objects/artefacts/works of art?

Legal Ownership

- Can you verify that the transfer of ownership to the museum is legal?
- And confirm that the provenance is satisfactory and legitimate in accordance with the 1970 UNESCO Convention on the Means of Prohibiting and Preventing the Illicit Import, Export and Transfer of Ownership of Cultural Property?

Found in Collection & De-Accession

- Just as a museum has a responsibility to define its scope of acquisition and adopt clear policies on accessions, so must it establish policies on disposing of objects outside its scope or that cannot be preserved or used for exhibition, research, or education.
- Do you have objects found in the collection (FIC) that have no identification? If so, apply the same considerations to these objects that you would use for a new acquisition.
- Deaccession and disposal of objects can lead to public criticism. To avoid this, the museum's right to deaccession objects should be clearly stated when accepting donations. And be prepared.
- Major problems are encountered when items are sold for financial reasons. Collections objects should never be sold to pay the light bills!
- The process of deaccessioning should be more rigorous than that for acquisition, and should involve careful and wise study and regulation. Deaccession should only be permitted when no legal obligations are in force.

A Note about Collecting for the Future

- When considering objects of today that may be relevant in the future, the museum should adopt an outline of collection objects they think they may need or want.
- A rational system of collecting designated contemporary objects should be produced.
- Collecting for the future should, however, be subject to review and periodic weeding out.
- Example: mobile phones.

Consider:

- How will the museum preserve and research its collections?
- How will the museum exhibit and interpret them?
- How will the museum be able to use them for educational purposes?
- Do you have appropriate materials and spaces for the exhibition of the collections?
- Do you have adequate space and archival materials to store the collections?
- Do you have storage space that is secure and free from hazards (e.g., insect infestation, mildew, water leaks)?
- Do you have an appropriate environment in which to store the collections?
- Do you have the professional staff to work with the collections?
- Do you have the appropriate level of trained staff and physical security for the collections?
- Do you have necessary special equipment or materials for the preservation and use of the collection (e.g., hazardous materials suits, hydraulic lift)?
- Do you have protocols that outline preservation, security, or movement of the collections in the event of a disaster?
- Do you have the funds for conservation treatment if the collections are not in a condition for exhibitions, research or education?
- **IF YES TO ALL, ACCEPT. IF YES AND NO, RECONSIDER. IF NO TO ALL, REJECT**

Educational Role

2:15-3:00 pm

- Are you a “Teaching Museum”?
- How do you engage students and faculty in memorable curricular and social experiences?
- How do you find out who might use your collections and programs in their teaching and research?
- Is this a priority for your parent institution?

The Teaching Museum

- Makes us unique & essential to our parent institution
- Discipline-based teaching (support faculty & courses in art, anthropology, science, history, museum studies, etc.)
- Cross-disciplinary: How do your collections, exhibitions, and programs enhance learning across the university?
- Create global citizens & adults who value museums
- Every staff member must be committed to these goals to be effective!
- Academic curator position: point person for academic engagement: offers ability to be pro-active in making sure the museum is embedded in the academy and reactive in managing faculty and student academic requests
- Facility use: study gallery, lecture hall, exhibition space

Making Academic Connections: How You Do It

- Course catalog review, based on both long-term interests (collections) and short-term opportunities (special exhibitions and projects)
- Address deans' meetings, have them affirm value of museum to their faculty:
 - Using collections, exhibitions, other resources
 - Giving their students independent study projects
 - Guest curating (faculty/students)
 - Participating in your advisory board/friends group
 - Participating in museum committees: collections, programs, strategic planning
 - Research on collections/programs; publications and presentations
 - Gallery talks; symposia and conferences

Making Academic Connections

- Get invited to department meetings: share ways of involvement; ask what they want
- New faculty and graduate student orientations
- Staff-led workshops (partnered with other centers) on how to use objects in teaching
- On-line collections and other resources
- Museum courses: intro to museum, exhibition planning, evaluation, etc.
- Incentives: buyouts of teaching, summer research; ex. JSMA Academic Support Grants
- Social events: receptions, concerts, films . . .

Engaging Students

- Students are our No. 1 constituency: we are in the business of teaching and training our next generations to be smart, productive, compassionate people
- Multifaceted approach: curricular support, social and cultural activities, and practical experience
- The museum resources can be highly effective in nurturing student scholarship and research skills, critical thinking, visual and cultural literacy, disciplinary depth, and interdisciplinarity

Engaging Students Academically

Scholarship and Research Skills, Critical Thinking, Visual and Cultural Literacy

- Internships
- Graduate teaching fellowships
- Student-curated exhibitions, gallery talks, publications (print and online)
- Collections research: didactics, audio tours

Engaging Students: Social & Cultural Activities

- Free student membership programs
- Student-organized student-only events (tours, receptions, exhibitions, performances, night out)
- Student clubs: volunteer base; enhance diversity
- Embed idea that museums are exciting social and cultural spaces for their adult lives
- Expand world view for civic leadership and global citizenship

Engaging Students through Work Experiences

- Real-life jobs (receptionists, monitors, administrative aides, researchers, docents)
- Curatorial/educational experience
- Build leadership skills, teamwork, public speaking
- Practice career paths: what do they love, what are they good at, what do they need to learn?
- Integrated Museum Studies model

Building Relationships with Faculty

- Include them in exhibitions/collections committees, advisory board, and strategic planning with other area faculty, off-campus community reps, collectors, staff, and students
- Develop courses together (team-teach) or, if you offer courses, invite them to lecture
- Offer private tours/ receptions and gatherings
- Invite them to select objects, advise on exhibitions and programs that will support their research and classes, working often years out
- Inform them of financial limitations and other resources and make them advocates for you. There is no better advocate to the provost and higher admin than faculty (and major donors).
- Have other faculty and administrators affirm your cross-campus and off-campus roles and priorities

Building Relationships with Faculty

Quantitative Ways Museums Affirm Value

of faculty and courses that use museum

of Colleges/Schools/Departments

\$ solicited and received from departments and academic centers; campus partners

of faculty on committees, advisory board, special projects

of faculty planned gifts, donations of money or collections

of students who visit /take courses in museum

students who work/volunteer in museum

job placement for museum-affiliated students

of alumni engaged (money, collections, etc.)

Off-Campus Engagement

- Is this part of your mission?
- Does the university care?
- Who are your off-campus constituents: museum members and donors, collectors, families, schools, families, scholars, public?
- Who are your community partners?

BREAK
3-3:15 pm

Breakout Sessions

3:15 – 3:45 pm

Pick a Topic:

- Mission, Governance, Strategic Planning
 - Collections Planning
 - Educational Roles

Closing Thoughts

- Share what you learned and your next steps
- What else should we cover, if we do this again, or offer a different Professional Development “Bootcamp”?
- Please complete evaluation.

Thank you!