UTAH OFFICE OF MUSEUM SERVICES

A MUSEUM GUIDE

The American Association of Museums defines a museum as:

an organized and permanent nonprofit institution, essentially educational or aesthetic in purpose, with professional staff, which owns and utilizes tangible objects.

The Institute of Museum and Library Services defines a museum as:

a public or private nonprofit institution which is organized on a permanent basis for essentially educational or aesthetic purposes and which, using a professional staff, owns or uses tangible objects, either animate or inanimate, cares for these objects and exhibits them to the general public on a regular basis. An institution uses a professional staff if it employs at least one staff member, or full-time equivalent, whether paid or unpaid, primarily engaged in the acquisition, care, or exhibition to the public of objects owned or used by the institution. An institution exhibits objects to the public if it exhibits the objects through facilities it owns or operates.

(An institution which exhibits objects by appointment may meet this requirement if it can establish, in light of the facts under all the relevant circumstances, that this method of exhibition does not unreasonably restrict the accessibility of the institution's exhibits to the general public.)

INTRODUCTION TO A MUSEUM GUIDE

The Utah Office of Museum Services (OMS) has prepared this guide to provide basic information to help make your museum a success. The guide is designed to address the needs of two audiences: those who are interested in starting a new museum but who are not museum professionals; and those who have been involved in the museum profession but have questions regarding specific museum issues. Therefore, some may choose to read each chapter in the guide to get an overview of all aspects of museum operation; while others will find that a specific chapter will address their concern.

OMS recognizes that this guide only touches on the basics of museum principles and recommends additional technical reading in the Appendices. Much of the material included in the guide was taken from the publication, *Starting Right* by Gerald George and Cindy Sherrell-Leo. The chapter on *Facilities Management* was prepared by Donald V. Hague and Steven Klass, two members of OMS Advisory Board. James Mason, another OMS Advisory Board member is responsible for *Press Kits*. Additional information has been collected from numerous sources, including Phil Notarianni, Utah State Historical Society; Cary Stevens Jones, Utah Childrens Museum; Mary Pat Matheson, Red Butte Arboretum; ASSLH Technical Leaflets. The format of the guide has been designed so that as new resource information is obtained it will also be included in the guide.

Mailing Address:
300 Rio Grande Street
Salt Lake City, UT 84101

Section I: SCOPE AND PURPOSE

An essential step in developing a successful museum is to prepare a museum plan. This plan should be made to answer twenty basic questions:

1. What is your museum's mission and its limits?
2. What sources of support can your museum count on?
3. What collections are available or need to be found to serve your museum's purpose?
4. What physical facilities will work for your museum?
5. Who will have responsibility for the museum?
6. What rules will govern its operations?
7. What divisions of labor and allocations of authority will there be?
8. How will harmonious working relationships be maintained?
9. What will be your collections policy?
10. What conservation needs must you meet and how?
11. What provisions will you make for continuing research?
12. What interpretive methods will you use to reach your public?
13. What time schedule for development will the museum follow?
14. What staff, paid and volunteer, will be needed?
15. What will each part of the plan cost to carry out?
16. Where will the money come from for each?
17. How will you maintain good public relations?
18. How will you provide for continual planning?
19. How will you evaluate your museum's activities?
20. How will you keep your museum alive, dynamic, create--even visionary?

This is your checklist for planning. The following sections will provide specific suggestions and recommendations as you address each of the twenty questions.

MUSEUM'S MISSION

A *Mission Statement* is a brief definition of the type and purpose of your museum. Some possible mission statements are the following:

- "The purpose of our museum is to preserve for public benefit the natural, historical, and artistic heritage of our region (or city, or county)."
- "The purpose of our museum is to elucidate the history of our community from the time of original inhabitants to the present time."
- "The purpose of our museum is to encourage the fine arts in our area by collecting and exhibiting exemplary works produced here in the past and present."
- "The purpose of our museum is to provide for the people of our rapidly urbanizing area an opportunity to remain in touch with nature through maintenance of a green preserve where specimens of our region's plant and animal life are exhibited."
- "The purpose of our museum is to increase understanding and appreciation of the particular heritage of our (ethnic, racial, or religious) group."
- "The purpose of our museum is to illustrate the history of our (business, industry, or other organization)."
- "The purpose of our museum is to preserve for public education and enjoyment the Jones (or whoever) Collection of decorative arts (or whatever)."

All these examples show that no one statement of mission or purpose suits every museum. You will need to analyze your possibilities and write your own mission statement. Be sure to analyze the *limits* of your intent. To be useful and meaningful, your museum's self-definition must have one particular thing in common with all of those above: it must tell what *limits* the museum will observe.

The limits may be on the kinds of objects collected, the period of history covered, or the group or area whose heritage is to be preserved. Identifying the limits of your intent is necessary to save you from accumulating a haphazard hodgepodge that will confuse your public, eventually overflow your facilities, eat up your resources, and ultimately put your museum at cross-purposes. So, first--and above all else--determine what limits you will place on your museum and get that established in a formal mission statement of scope and purpose.

Questions to evaluate SCOPE AND PURPOSE

1. Does your museum seem clear about its mission?

2. Is the mission of you museum appropriate given its particular geographical context and resources?

3. Have there been periodic reevaluations of your museum's mission and purpose to determine ongoing relevance?

4. Does there seem to be a history of public service? Are programs/exhibitions well presented and attended?

5. Is your museum clear about the audience which it seeks to serve?

6. Does your museum want to expand its audience and reach special constituencies or interest groups? What are methods, plans and programs for doing this?

7. Has your museum developed any type of long range plans for future growth and development? Are these plans realistic?

8. How is your museum unique (location, collections, programs)?

Section II: FORMAL STRUCTURE

HOW TO OBTAIN ORGANIZATION INCORPORATION AND TAX EXEMPTION

WHY INCORPORATE?

An important step for a new museum is its incorporation as a nonprofit organization. To incorporate means to become recognized as a legal entity separate from the individuals who work for it. This is important for several reasons:

1. Members of unincorporated organizations may be held personally liable for the organization's debts or may be personally sued in regard to the consequences of its actions. When a corporation is formed, only the organization's separate assets are normally subject to collection of suit. Thus, the individual members of the governing body (called either the board of directors or the board of trustees) are insulated from liability.
2. An unincorporated organization cannot purchase, hold or sell any kind of property in its own name since property is considered to belong jointly to all members; neither can gifts or bequests be received in the organization's name. These powers are granted to corporations.
3. An unincorporated organization cannot obtain tax-exempt status. Tax exemption is vital to an organization if it expects to receive contributions which can be tax-deductible for the donor. It should be noted that documents resulting from the incorporation process are used in support of requests for federal and state tax exemption. More information on this point will follow in later sections.

The term "nonprofit" does not imply (as is often believed) that income can never exceed expenses! Rather, it means that corporate income may never be distributed for the personal gain of members in the sense the stockholders of profit-making corporations receive dividends. In other words, an museum is required to apply its income to the achievement of its public purposes. It may not be operated for anyone's personal gain, though this does not preclude compensation or salary for persons working for the organization. It should be remembered that a healthy bank balance is not only legal, but desirable.

The point, then, is not whether an organization "makes money," but what it does with the money it makes. Because the term "nonprofit" is often misleading, another description--"not-for-profit"--has gained popular usage because it refers back to the purpose of the organization. This alternative more correctly emphasizes the intent of this type of organization to operate for reasons other than the generation of profits. The nonprofit classification is essential in order to file for tax-exempt status.

A nonprofit corporation is granted certain powers to carry out its stated purposes. These include the powers: (These powers are automatic and need not be listed in the articles of incorporation.)

- To exist perpetually
- To have a corporate seal
- To elect officers, appoint agents, and fix compensation
- To make and alter bylaws
- To purchase, receive, and take gifts and bequests, or otherwise acquire, hold, own, and improve real and personal property
- To sell, convey, lease, and transfer property
- To acquire, hold, and dispose of securities
- To lend money for corporate purposes
- To make contracts, incur liabilities, borrow money, and issue notes
- And, in general, to have and exercise all powers necessary to effect any and all of the purposes for which the corporation was formed

THE NECESSARY OPERATING DOCUMENTS

The guidelines by which your organization is established require proper documentation. The articles of incorporation must be filed in order to become legally recognized as a nonprofit corporation. Bylaws, although not mandatory for incorporation, provide a flexible framework for general management procedures and should be drafted concurrently with the articles of incorporation. It should be noted that both of these documents are required if the organization plans to file to tax exemption (see Section). Written standing rules, while not required, serve as a useful reference for the daily operation of the organization. The following is a brief description of each document.

Articles of Incorporation

A nonprofit corporation comes into existence when its articles of incorporation are properly filed with the Utah State Department of Commerce. These articles provide an official statement of the purpose's powers, and general structure of the corporation. It is important that careful thought is given to goals and plans before the drafting of articles of incorporation since the wording of this document could affect the organization's legal ability to peruse its aims. As with any legal document, it would be advisable to have the counsel of an attorney in writing and or reviewing the articles before filing. A sample of a complete set of Articles of Incorporation follows in Appendix A.

Bylaws

An organization's bylaws establish the normal working rules for its governance. They should be simple and flexible. Too much detail will involve the organization in endless discussions of minutiae, and likely as not, illegal actions by the board for some minor infractions of bylaws procedures. However, particular care should be taken concerning the definition of voting members and all election proceedings in regard to the board of directors. The size of the board (except for minimum and maximum limits), method of election, officers, fiscal year, and other such details should appear only in the bylaws. In this manner, any amendments in operating procedures can be effected by simply changing the bylaws without also having to legally amend the articles of incorporation with the Utah State Department of Commerce/Div of Corporation office. See Appendix B for an example of organizational bylaws.

Standing Rules

An organization may decide to adopt standing rules which serve as general in-house operating and management procedures. These may be used to specify guidelines for meetings, attendance of board members, organizational structure (standing committees, for example), and duties of the executive staff and board members. The standing rules, like the bylaws, may also be amended as needed by vote of the board without having to file for legal amendment as is required for the articles of incorporation.

DRAFTING THE ARTICLES OF INCORPORATION

The following general suggestions may aid you in the drafting process. The information required in the articles of incorporation is outlined below.

Corporate Name

Select a name which is not substantially or deceptively similar to that of any other corporation. In most cases, including the name of your town or county in the title will eliminate confusion. Special care should be taken if a museum already exists in the community or if towns and counties have similar names.

Period of Duration

Since museums are seldom organized for a fixed period of time, the word "perpetual" is usually inserted. This is not merely an exercise in positive thinking, but will prevent the museum's corporate privileges from lapsing automatically at some future date. Refer to the paragraph on "Dissolution" in this section should your organization find it necessary to disband.

Purposes

This section serves as a statement of the museum's reason for being. It should reflect the forethought of the organizers and not be transplanted from other models without careful tailoring to the specific needs of the museum. The purpose statement should indicate in general terms the areas of intended activity without being unnecessarily restrictive. It is advisable to express the proposed activities of the museum in broad terms of "education." This will help make it clear that the museum falls within one of the three purpose categories--educational, charitable, and religious--which can be considered for federal tax exemption under section 501 (c)(3) of the Internal Revenue Code. It should also include a statement that it is organized as a non-profit corporation.

Bylaws

A museum's intent to use bylaws as a framework for its operating procedures should be stated in the articles of incorporation. A statement of how bylaws are to be amended by the members or by the board should also be included in this section.

Classes of Members

A nonprofit corporation may choose to have one or more classes of membership, (for example: "patron," "associate," and individual," or other terms which reflect various dollar requirements and privileges). Since thoughts on this matter may change with experience, it would be wise to defer any formal statements on the subject to the bylaws where amendments can be made much more readily. This can be done by simply inserting the phrase "as determined in the bylaws" at this point in the articles of incorporation.

Board of Directors

This section of the articles will list the names and street addresses of persons (at least three) who will serve as an initial board of directors. These may be chosen at the discretion of those organizing the museum since a formal election cannot be held until the corporation is legally formed and bylaws are adopted. The size of the subsequent elected board may be expanded to a larger size as determined in the bylaws. Typically, boards of new museums number seven to fifteen.

The board of directors or trustees, both of which terms are acceptable, is the body responsible for the legal and financial operation of the corporation. As a rule, the board meets regularly to review the work of the organization, to determine policy, to review the financial status, to plan, and to maintain the activities of the organization in light of its purpose and mission. In the case of nonprofit organizations, members of the board often have the additional responsibilities of raising funds and working on committees for the projects of the organization.

Registered Office and Registered Agent

Every nonprofit corporation must have a registered office and registered agent on file with the Department of Commerce (Required by the Constitution of Utah, Article XII, Sec. 9). This is to designate where and to whom legal notices concerning the corporation are to be delivered, and must be stated in the articles of incorporation. The registered office can be the office, if any, of the museum, or of an attorney or businessperson. A street address is required; a post office box will not be accepted. The registered agent can be an individual or another corporation operating at the designated address. Since a fee is involved for each change of a registered office or agent it is advisable to make choices which are likely to remain stable over a reasonable period of time.

Amendments

The following is a brief outline of amendment provisions for the articles of incorporation. It is strongly recommended that the Division of Corporations and Commercial Codes be consulted before finalizing the articles and any subsequent amendments.

Fundamental changes in the organization may require a change in the articles of incorporation. Provisions should be stated within the incorporating document as to how amendments are submitted and voted upon--either by 2/3 of the membership if your museum had classes or categories of members, or by 2/3 of the board if your museum has no membership categories.

The amended articles must then be executed in duplicate by the museum, verified by one of the principal officers and must state the following:

- The name of the corporation
- The amendment so adopted
- The manner of the vote (either by membership or board)
- The date of the meeting for the vote, and
- An acknowledgment that the amendment received 2/3 of votes of the appropriate voting body

The duplicate originals must be submitted to the State Department of Commerce/Div or Corporation office for final ratification of amendment. Certificate of amendment, together with the duplicate original of the articles of amendment shall be returned to your organization.

Dissolution

State law requires the incorporators to include "provision(s) for distribution of assets on dissolution or final liquidation and any provision which is to be set forth in the bylaws." Since there are no owners of a nonprofit corporation, the public alone is understood to benefit from its operation. For example, if a nonprofit corporation ceases its activities, the members cannot simply divide up corporate property or unobligated monies among themselves. Rather, these assets would be turned over to similar organizations working toward the same kinds of public objectives.

Although the dissolution process is not difficult, there are a number of regulations on the matter. The foregoing is a brief summary of the process and consultation with the Department of Commerce;s office or an attorney is advised should you find it necessary to dissolve the corporation.

Additional Provisions

This section in the articles allows for the insertion of any additional provisions which the incorporators may wish to make. A good rule of thumb is not in include any specific provisions already covered by general purpose statements and powers. It would, however, be desirable to include in this section clauses suggested by the Internal Revenue Service (see IRS Publication #557, "How to Apply for Recognition of Exemption") which clearly restrict the corporation to tax-exempt activities. The presence of these provisions may aid in rapidly obtaining favorable tax determinations.

Incorporators

The person or persons, aged 21 or over, who are carrying out the process of forming the corporation should be listed in this section along with their street address. This will involve signing and acknowledging the articles of incorporation before a notary public. The person or persons acting as incorporators may or may not also be board members.

Acknowledgement

The final portion of the articles of incorporation is the legal format for the acknowledging signature(s) of the incorporator(s) and the notary's seal.

Summary

In summary, the articles of incorporation must include the following:

- Corporate Name
- Period of Duration
- Purposes
- Bylaws
- Membership Classification
- Board of Directors
- Registered Office and Registered Agent
- Amendments
- Dissolution
- Additional Provisions
- Incorporators
- Acknowledgment

INCORPORATION FILING PROCEDURES

In order to file the articles of incorporation with the State Department of Commerce, they must be signed and notarized. The Articles of Incorporation must be in duplicate with **original signatures on one copy** which have been notarized. A $20.00 filing fee (made out to the State of Utah) must be remitted with the Articles of Incorporation to:

State of Utah
Division of Corporations and Commercial Code
160 East 300 South/Box 45801, Salt Lake City, UT 84145-0801
(801) 530-4849

If the Department of Commerce finds that the articles of incorporation conform to law, and the fee is paid, he/she will endorse on each of the duplicate originals the word "filed" and the date of the filing; file one of the duplicate originals in his/her office; issue a certificate of incorporation to which the other duplicate original will be affixed. The certificate of incorporation, with the duplicate original of articles of incorporation, shall be returned to your organization. Upon the issuance of the certificate of incorporation, the corporate existence will begin and the certificate documents that all conditions necessary for incorporation have been met by the incorporators.

FILING FOR TAX EXEMPTION

Essentially, tax exemption means that income related to the nonprofit purposes of the corporation will not be taxed by the federal government (Internal Revenue Service) and/or the State of Utah (Tax Commission). You must file separately with each of these agencies to obtain this status. As previously stated, tax exemption enables your organization to receive contributions which can be tax-deductible for the donor. Your organization also becomes eligible to apply for grants from government agencies such as the Utah Office of Museum Services.

To avoid errors in filing for this status, your applications should be reviewed by an accountant or an attorney who is familiar with this process. You may also contact both the Utah Tax Commission and the IRS if you need assistance.

State Tax Exemption

In Utah, Corporate income tax is known as the franchise tax. Any organization whose registered office is in Utah and is not organized for profit may qualify for exemption from franchise tax under Utah Corporate Franchise regulations. This tax exemption releases the organization from filing returns and paying taxes on income related to its nonprofit purposes. The Utah Tax Commission will provide (free of charge) a copy of "Utah Corporation Franchise Tax Regulation No. 18," which describes state tax exemption criteria in detail.

To qualify, you must submit the following:

- An affidavit showing the character of the organization, the purpose for which it was organized, its actual activities, the sources and the disposition of its income, whether or not any of its income is credited to surplus or may inure to the benefit of any private stockholder or individual and, in general, all other facts relating to its operation which affect its right to exemption;

- A copy of the articles of incorporation;

- A copy of the bylaws of the organization;

- The latest financial statement showing the assets, liabilities, receipts, and disbursements of the organization.

These materials should be mailed or delivered to:

Utah State Tax Commission
Heber Wells Office Building
160 East 300 South
Salt Lake City, Utah 84134
(801) 530-4848

Federal Tax Exemption

To receive tax exempt status from the Internal Revenue Service, your organization must qualify as what is called a "501 (c) (3)" corporation. That designation refers to the section in the Internal Revenue Code which concerns nonprofit corporations organized for educational, charitable, or religious purposes. Chapter 3 of the IRS Publication 557 (Appendix C) discusses the rules and procedures necessary to apply for tax-exempt status. You must submit a completed IRS for #1023, (Appendix D), which is fairly complex, to:

Internal Revenue Service
160 East 300 South
Salt Lake City, Utah 84134
(801) 530-4848

You may find it necessary to consult an accountant or attorney in preparing the application, and quite often the IRS will require additional information before issuing the ruling on your organization's status. In general, you will not receive notification of tax-exempt status sooner than three months after submitting the application.

ANNUAL REPORTING REQUIREMENT

Incorporation

As a corporation recognized in the State of Utah through the State Department of Commerce office, your organization must file an annual report to maintain the corporate status. The Department of Commerce's office provides a simple one-page form for the annual report. (Appendix E).

If you have received your nonprofit status:

- Your completed annual report (pink copy) will be accepted between January 1 and March 1 of each year.
- There is a $10.00 annual filing fee

The annual report forms are available at:

Utah State Department of Commerce
Division of Corporation
160 East 300 South
SLC UT 84111
(801) 530-4849 ext 1

The completed forms should be returned to the same office. Failure to file an annual report will result in suspension of your corporate status.

State Tax Exemption (Utah Tax Commission)

Currently, there are no annual reporting requirements for a nonprofit corporation which has received its state franchise tax exemption. However, the Utah Tax commission will, from time to time, require the corporation to file an affidavit, on a form which will be furnished, revealing the corporation's current status.

Federal Tax Exemption (Internal Revenue Service)

A nonprofit museum organization which has received its federal tax exemption under the "501 (c) (3)" IRS code must file both IRS form 990 and Schedule A (supplementary information form) to maintain its tax-exempt status, (Appendix F). Both are due annually by the 15th day of the fifth month after the organization's accounting period ends.

Printed instructions (Appendix C) and general information concerning the filing of these forms can be obtained from:

Internal Revenue Service
Heber Wells Office Building
160 East 300 South
Salt Lake City, Utah 84134
(801) 530-4848

Completed forms must be mailed to:

Internal Revenue Service Center
2540 Washington Blvd Suite 101
Ogden Utah 84401
(801) 626-3685

SAMPLE OF ARTICLES OF INCORPORATION

NOTE: *Please remember that the following Articles of Incorporation are only an example. While all the basic legal requirements have been included, it should only be used as a general guide for developing Articles of Incorporation which are most suited to the purpose of your organization. It is recommended that an attorney be consulted as you go through this process.*

ARTICLES OF INCORPORATION

OF

THE SAMPLE MUSEUM, INC.
A Nonprofit Corporation

The undersigned, acting as incorporators of the Sample Museum, Inc., organized and incorporated under the "Utah Non-Profit Corporation and Cooperative Association Act," Adopt the following Articles of Incorporation for such corporation:

ARTICLE I

NAME

The name of the corporation is the Sample Museum, Inc.

ARTICLE II

PERIOD OF DURATION

The period of duration of said corporation is perpetual.

ARTICLE III

PURPOSE OF THE CORPORATION

This is a nonprofit corporation organized and to be operated exclusively for educational purposes as that term is used in section 501 (c)(3) of the Internal Revenue Code of 1954, as amended; specifically to educate the general public to foster, promote and increase public knowledge and appreciation of the museums by all citizens in Sample County. The corporation shall not be operated for the purpose of benefiting any one person or group but shall be operated for the museum community as a whole. The corporation shall have all the powers of nonprofit corporations which are now or hereafter may be authorized and granted by law.

ARTICLE IV

BYLAWS

The Trustees of the corporation may adopt Bylaws by which the corporation will be operated. The bylaws may be amended by the membership at large, in which case the Bylaws so adopted may be amended or repealed by the membership.

ARTICLE V

MEMBERSHIP

The qualifications for membership, the number of members and such other matters pertaining to membership as shall be necessary or desirable shall beset forth in the Bylaws.

ARTICLE VI

BOARD OF TRUSTEES

The number of Trustees of this corporation shall be not less than three (3) nor more than fifteen (15). The number of Trustees shall be determined by the Bylaws. The Trustees shall hold office after election for a term of three (3) years ending with the date of the third next annual meeting, except that one-third of the Trustees shall be initially elected for a period of one (1) year and one-third of the Trustees shall initially be elected for a period of two (2) years. Trustees shall continue in office until their successors are elected or appointed and qualify. The Governing Board may appoint Trustees to succeed those whose office expires or becomes vacant for any cause. A majority of the Governing Board may remove a Trustee with or without cause.

ARTICLE VII

REGISTERED OFFICE AND REGISTERED AGENT

The address of the initial registered office of the corporation is as follows:

Ms Janet Johnson
1 West Main Street
Sample City, Sample County, UT   ZIP

ARTICLE VIII

AMENDMENT OF ARTICLES

The Articles of Incorporation may be amended from time to time in any and all respects as may be desired, as is provided by law. The amendment or amendments shall be made by the membership at a meeting thereof upon and by receiving a vote of two-thirds of the members.

ARTICLE IX

DISSOLUTION

Upon dissolution of the corporation, the assets of the corporation shall be applied and distributed as follows, provided that in no event shall any assets of the corporation be distributed to or inure to the benefit of any of the members or Trustees of the corporation:

A. All liabilities and obligations of the corporation shall be paid, satisfied and discharged, or adequate provision shall be made therefore.

B. Assets held by the corporation upon condition requiring return, transfer or conveyance, which condition occurs by reason of dissolution, shall be returned, transferred or conveyed in accordance with such requirements.

C. All assets remaining after the distributions set forth in the foregoing paragraphs A and B, including assets received and held by the corporation subject to limitations permitting their use only for charitable, religious, eleemosynary, benevolent, educational or other purposes for which a corporation may be formed under the Utah Nonprofit Corporations Act, but not held upon a condition requiring return, transfer or conveyance by reason of the dissolution, shall be transferred or conveyed to one or more domestic or foreign corporations, societies, or organizations engaged in activities substantially similar to those of the corporation and operated exclusively for educational purposes as that term is used in section 501 (c)(3) of the Internal Revenue Code of 1954, as amended, pursuant to a plan of distribution adopted as provided in Utah Code Annotated Section 16-6-64 (1953).

ARTICLE X

ADDITIONAL PROVISIONS

In addition to the powers granted corporations under the laws of the State of Utah, the corporation shall have full power and authority to make distributions, in keeping with corporate purposes, to organizations that qualify as exempt organizations under Section 501 (c)(3) of the Internal Revenue Code of 1954 (or the corresponding provisions of any future United States Internal Revenue Law).

It is provided that no part of the net earnings of the corporation shall inure to the benefit of, or be distributable to, its members, trustees, officers, or other private persons, except that the corporation shall be authorized and empowered by pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes herein set forth. No substantial part of the activities of the corporation shall not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of any candidate for public office. Notwithstanding any other provision of these articles, the corporation shall not carry on any other activities not permitted to e carried on (a) by a corporation exempt from federal income tax under Section 501 (c)(3) of the Internal Revenue Code of 1954 (or the corresponding provision of any future United States Internal Revenue Law) or (b) by a corporation, contributions to which are deductible under Section 170 (c)(2) of the Internal Revenue Code of 1954 (or the corresponding provision of any future United States Internal Revenue Law).

ARTICLE XI

INCORPORATORS

IN WITNESS WHEREOF, the incorporators below named have caused these Articles of Incorporation to be made, entered into and signed by this 24th day of January, 1994.

Ms Janet Johnson	49 Dutch Elm Drive	Sample City ZIP
Mr Fred Forest	59 Lumber Lane	Sample City ZIP
Mr Daniel Davis	69 Community Avenue	Sample City ZIP

TYPICAL BYLAWS OUTLINE

1. Name of the museum and governing organization
2. Purpose(s)
3. Board of Directors (trustees, or equivalent policy setting body)
    a. Number, qualifications, and terms of office
    b. Nomination and election procedures
    c. Removal procedures
    d. Filling of vacancies
    e. Place, time number, and requirements for announcing meetings
    f. Quorum requirements
    g. Committees
4. Officers
    a. Number and method of election or selection
    b. Powers and duties
    c. Removal procedures
5. Members (if any)
    a. Classifications
    b. Dues and benefits
    c. Meetings and provisions for notice and a quorum
6. Advisory Bodies (if any)
    a. Appointment procedures and requirements
    b. Powers and duties
7. Financial Provisions
    a. Definition of fiscal year
    b. Authority to sign checks and transfer funds
    c. Authority to enter contracts
    d. Authority to accept gifts and donations
    e. Budget preparation and financial reporting requirements
8. Amendment Procedures

NOTE: Constitutions and bylaws are not window dressings or mere legal formalities. You'll suffer if you put anything into governing documents that you don't intend to live by. And it helps to draft such documents as clearly and precisely as you can, so that those who will be legally responsible under them can understand their requirements unmistakably from the outset.

SAMPLE BY-LAWS:

BY-LAWS
UTAH MUSEUM SERVICES ADVISORY BOARD*

As approved by the Advisory Board of the Utah Office of Museum Services on March 16, 1994.

ARTICLE I
NAME

The name of the organization shall be the Advisory Board of the Utah Office of Museum Services, herein referred to as the Board.

ARTICLE II
AUTHORITY

The Board is organized under Utah state law (UCA 9-4-1005) for the following purposes:

A. To be the advisory making body for the Office (Office of Museum Services)

B. In consultation with the Director of the Office:

  1. To recommend policies and write rules governing the office grants program.
  2. To recommend eligibility guidelines for grants administered through the Office.
  3. To recommend policies and make rules governing the awarding of grants to assist Utah's eligible museums.

C. To advise the Director in the pursuit of the purpose of the Office, in accordance with Utah state law (UCA 9-4-1002-2), to assist Utah museums in improving their ability to care for and manage collections, develop quality educational resources such as exhibitions, collections, and publications and provide access to collections for research.

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ARTICLE III
MEMBERSHIP

The Board shall consist of eleven (11) members, appointed by the Governor, with the advice and consent of the Senate, to staggered four-year terms, in accordance with Utah sate law (UCA 9-4-1004). In accordance with that section:

A. At least six members will be qualified, trained and experienced museum professionals, three of whom shall have a minimum of five years continuous paid work experience in a museum and be drawn from a list proposed by the Utah Museums Association.
B. Other members will be persons with an interest in Utah's museums; and
C. Members shall provide representation from throughout Utah.
D. Members may be reappointed for one additional term only, unless the governor determines that unusual circumstances warrant a further term.
E. Members of the Board shall serve without compensation, but they may be reimbursed for expenses incurred in the performance of their official duties.

The members of the Board shall hold their offices until their successors are duly appointed.

The Director of the Office shall be an ex-officio, non-voting member of the Board.

ARTICLE IV
MEETINGS

The board shall meet at least quarterly at a time and place determined by the Chair. Additional meetings may be called at any time when deemed appropriate by the Chair. Meetings shall be open to the public, according to the Open and Public Meetings Act (UCA 52-4). Meetings may be closed when required, in accordance with UCA 52-4-4 and 52-4-5.

All meetings shall be called by giving no less than 10 days notice to the members of the Board. Meeting dates shall be set at the previous meeting when possible. Notices of meetings shall be accompanied by an agenda and minutes from the Board's previous meeting.

Six members of the Board are a quorum for the transaction of business (UCA 9-4-1004-6). The business of the Board shall be governed by simplified parliamentary procedures as adopted by the Chair. A majority vote of a quorum shall be required to adopt Board action. The Chair shall vote only when that vote is necessary to break a tie.

ARTICLE V
SUPPORT

The Office shall provide staff support for Board Meetings. The Office shall provide staff support for Committee meetings and other Board activities only upon request by the Board Chair and with approval of the Director of the Office. Support activities for Board meetings include, but are not limited to:

A. Attending the meetings of the Board;
B. Providing adequate notice of Board meetings in accordance with state law and Board By-Laws;
C. Keeping a record of the proceedings of the Board; and
D. Maintaining and being the custodian of all documents and information filed with the Board; and
E. Performing other duties as directed by the Board Chair in carrying out the duties of the Board.

ARTICLE VI
OFFICERS

The officers of the Board shall be a Chair and a Vice Chair. The Chair shall be appointed by the Governor according to the Utah state law (UCA 9-4-1004-5). The Vice Chair shall be elected by the Board. The Chair shall serve in that capacity for a term of two years at the pleasure of the Governor. The term of the Vice Chair shall coincide with the term of the Chair. The Vice Chair shall serve as the Chair in the absence of the Chair for a properly called Board meeting. In the absence of both officers at a properly called Board meeting, a quorum of the members shall select a temporary chair from members who are present.

ARTICLE VII
DUTIES OF THE BOARD

A. The Board shall determine the direction for the Office and render advice to the Director concerning the duties of the Office in accordance with UCA 9-4-1005 and UCA 9-4-1003, including, but not limited to:
    1. Developing and coordinating programs, workshops, seminars and similar activities designed to provide training for staff members of the Utah museums;
    2. Advising state and local government agencies and employees regarding museum related issues, including museum capital development projects;
    3. Providing to Utah museums technical advice and information about sources of direct technical assistance;
    4. Assisting and advising Utah museums in locating sources of training for their museum staff members;

ARTICLE VII
DUTIES OF THE BOARD
(continued)

5. Undertaking scholarly research as necessary to understand the training needs of the museum community and to assess how those needs could best be met; and
6. Administer a state Museum Grants Program to assist eligible Utah museums.

B. Promote an understanding and appreciation of Utah's museums so that they are fully integrated into the cultural, educational and economic aspects of Utah's communities for the benefit of Utah's citizens and visitors.

C. Approve the formation of Board and advisory committees and either appoint members to these committees or authorize the Chair to appoint members.

D. Review the Office's budget request and make recommendations regarding funding to the Department of Community and Economic Development, Governor and Legislature, and otherwise assist the Office in securing funds for its activities not funded through the legislature.

E. Board members shall:
1. Accept committee assignments, including accepting the chair of committees, as delegated by the Board Chair.
2. Coordinate all Board-related activities through the Board Chair or appropriate committee chairs.
3. Excuse themselves from actions taken by the Board and by its committees whenever they serve as officers of organizations that benefit from Board actions, or when they have a personal, family or fiduciary interest in the action or otherwise have a conflict of interest, or when failure to do so results in an appearance of a conflict, and otherwise abide by Utah state policy regarding conflict of interest.
4. Support the office staff but shall not in any way interfere in the day to day activities of the staff programs.
5. Have access to office equipment, resources and staff only when the activities involved aid in the advancement of official office programs.

ARTICLE VIII
IMMUNITY

Board members, for purposes of the Utah Government Immunity Act, are state employees and are thus protected by that Act, provided they are acting as Board members and that their acts or failures to act are not due to fraud or malice (UCA 63-30).

ARTICLE IX
COMMITTEES

The Board may authorize the formation of Board and advisory committees and either appoint members to these committees or authorize the Board Chair to appoint members. All committee Chairs and Members serve at the pleasure of the Board Chair.

A. Executive Committee
   The Executive Committee shall be appointed by the Board Chair and shall include Board Officers and Committee Chairs. The Board Chair shall serve as Chair of the Executive Committee. Members of the Executive Committee shall serve until a successor has been appointed or as long as they chair a Board committee. A majority of members shall constitute a quorum and a majority vote of a quorum shall be required to approve Executive Committee action. The Chair shall vote only when that vote is necessary to break a tie.
B. Board Standing Committees
   The Board may authorize the formation of Standing Committees, made up of members of the Board. Standing Committees are given a specific mission by the Board and are authorized until disbanded by a majority vote of the Board. Members of Standing Committees are appointed by the Board Chair, with the approval of the Board. All assignments of Board members to Standing Committees shall continue until the end of their current Board term or until they resign their committee appointment. Members can be reappointed to committees.
C. Board Task Committees
   The Board may authorize the formation of ad hoc Task Committees, made up of members of the Board. Task Committees are given a specific task to accomplish and a specific time frame in which to accomplish the task. Task Committees are disbanded by a majority of the Board at the completion of the task. Members of Task Committees are appointed by the Board Chair, with the approval of the Board. All assignments of Board members to Task Committees are until the completion of the task or until the end of their current Board term, or until they resign their committee appointment.

D. Advisory Committees
   The Board may authorize the formation of Advisory Committees, made up of those who are not necessarily members of the Board. Advisory Committees may function like task committees or they may function like standing committees. The Chairs of Advisory Committees are appointed by the Board Chair. Members of Advisory Committees are appointed by the Board Chair in consultation with Advisory Committee Chairs. Advisory Committees include at least one member of the Board. Members of Advisory Committees serve until the completion of their assigned Task or for a predetermined term, or until they resign their committee appointment.

ARTICLE X
AMENDING BY-LAWS

The By-Laws may be amended or altered at any meeting of the Board by a vote of two-thirds of the members present, provided notice of the proposed changes have been mailed to each member not less than ten days prior to such meeting.

Questions to evaluate FORMAL STRUCTURE

1. Do governing documents clearly outline the purpose of your museum?
2. Does your museum periodically reevaluate its statement of purpose, constitution and bylaws to insure that its purpose remains relevant?
3. Does your museum maintain an operational manual to deal with job descriptions and personnel policies?
4. How is your board of trustees elected? How is it rotated?
5. How effective is the overall relationship between your board of trustees and your director? your museum?
6. Does the board distinguish between the creation of policy and the administration of your museum?
7. Do board members actively raise funds for your museum or make personal financial commitments?

Section III: ADMINISTRATION

Museums have been developed and operated successfully by volunteer directors, but it is recommended that you seek a director who has formal training and experience in museum work, and that your director be paid. It makes no more sense to turn over a community museum to an inexperienced volunteer to manage than it would to turn over the local high school or public library to an untrained person.

Almost all museums, no matter how many paid professional staff members they have, also use *volunteers* to carry out valuable, sometimes essential, functions. Under proper supervision, volunteers can help with almost anything--driving busloads of school children to the museum, guiding tours through the museum's exhibits, taking tickets, helping with research, keeping records, or providing accounting services, legal counsel, and fund-raising leadership. Your plan should designate what parts of your programs can be carried out with the help of volunteers, so that provision can be made for recruiting and preparing them. Successful museums treat volunteers with as much care and respect as professional staff.

It can be as useful to have job descriptions for volunteers as for paid staff. All candidates for volunteer work need to be interviewed concerning experience, abilities, and interests, and each may legitimately be asked to provide references to check for such qualities as dependability and honesty. It is recommended that, in accepting a volunteer, the museum put on paper in advance an agreement specifying what the volunteer will do, how many hours will be worked per week, and at what times of day or night that individual will be on the premises. Volunteers must be given work that is meaningful and satisfying to them as well as useful to the museum. Once they agree to do those things, however, they need to understand that the museum will depend on them. To be accepted, volunteers should agree on joining the staff, to be routinely evaluated, and to keep their work to high standards of performance.

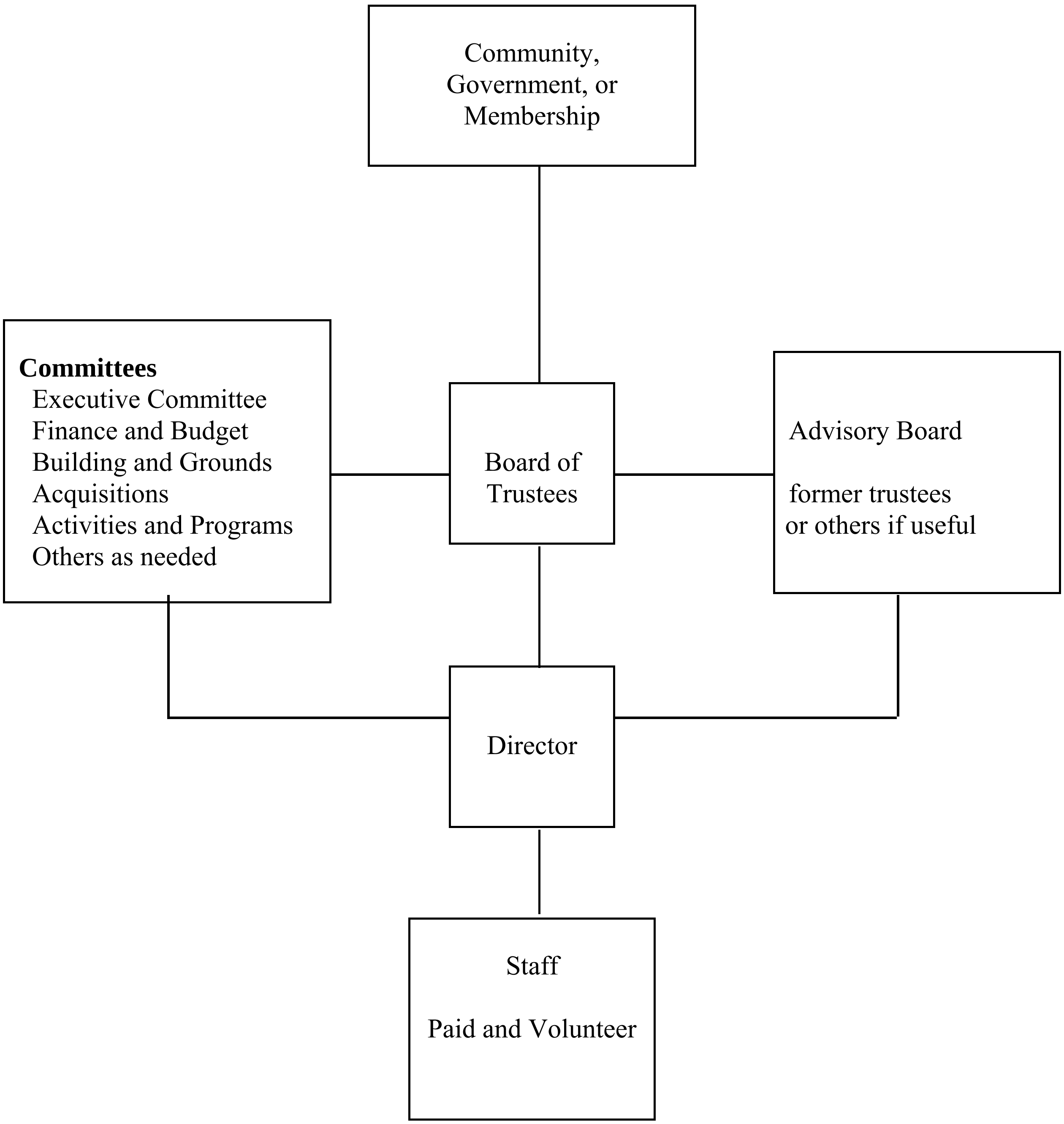
SAMPLE JOB DESCRIPTION

Job Title:	Director

Classification: (if part of a government organization)

Education:	Bachelor's degree minimum and advanced degree preferred in museum studies or a discipline related to the museum's mission and collections.
Experience, skills and knowledge:	Organizational and administrative ability. Ability to initiate programs, train and motivate people, coordinate activities, speak publicly, and deal effectively with the public, private groups and community organizations. Considerable knowledge of and interest in the subject matter dealt with by the museum. Should understand museum development and be able to communicate that understanding to the Board and others outside the museum field. Minimum of five year's experience in museum work. Previous managerial or supervisory experience preferred.
Job Description:	1. Responsible for orientation, training, work assignments, motivation,and evaluation of other staff and volunteers. 2. Responsible for development of plans and budgets for consideration by the Board and implementation of approved plans for budgets. 3. Responsible for establishing and maintaining appropriate records, forms, procedures and practices relating to collections, personnel, purchasing and general administration. 4. Responsible for building security, visitor safety, and maintenance of facilities and equipment. 5. Responsible for developing and carrying out all on-going activities and special programs of the museum with budgets and policies authorized by the Board. 6. Attends all meetings of the Board and its committees, maintains liaison with them, provides financial and other reports as requested by the Board, and maintains public relations broadly in the community.
Compensation:	Includes salary, medical insurance, retirement plan contribution, sick leave, vacation time, and paid opportunities for professional development such as attendance at annual meetings of relevant professional associations.

BASIC ORGANIZATION CHART



Questions to evaluate ADMINISTRATION

1. Does a director's position exist and how is this position funded? What is the experience and training of the director?

2. Do staff members have training or experience in their fields?

3. Does the size of the staff seem adequate for the needs of your museum?

4. Are salaries and fringe benefits commensurate with other museums or service organizations within the region?

5. Is the staff aware of available professional training/educational programs, and are they encouraged to take advantage of these?

6. In what areas of operation is staff most needed?

7. In what areas of museum operation are volunteers most active?

8. In what areas are volunteers most needed?

9. How are volunteers recruited, and do they represent a broad cross-section of the community?

10. Does your museum provide each volunteer with a job description and training program?

11. Does your museum reward volunteers for their service? If so, how?

Section IV: FINANCIAL PLANNING

What does your museum require in *financial resources*? What will each program, each part of the plan, including staffing, cost to carry out over time?

Some expenses are more or less fixed, necessary expenses for doing anything at all. General overhead expenses are in this category--such things as facility maintenance (heat, light, custodial, and security costs); basic personnel (at least the director's salary and fringe benefits); and care of collections, whether stored or on exhibit.

Other expenses are *out-of-pocket*, incurred only if a particular special project is undertaken, such as construction costs of a new exhibit, transportation costs for a particular "outreach" activity, mailing costs of a special promotion, or printing costs for a new publication or brochure.

Your museum plan needs to provide for reasonably dependable sources of funds for general, on-going operating expenses and to show what additional sources of funds the museum will try to tap for additional "out-of-pocket" expenditures.

Sooner or later, in the plan and in annual budgets, you will need to estimate the costs of everything connected with the museum and calculate which source of revenue can realistically be expected to cover each cost. Will the county tax appropriations pay for staff salaries and fringe benefits? Will the city government provide utilities, maintenance, and security for the museum's building? Will membership dues or admission charges be necessary to cover other operating costs? Should certain special projects with heavy out-of-pocket costs be undertaken only if grants from corporations, foundations, or individuals are secured particularly for them? Will acquisitions each year depend on the success of an annual fund-raising event? Will interest from the endowment fund pay for research, conservation, or other things? Will additional fund raising be necessary to raise an endowment fund to provide interest income in each year's budget? Will a special capital-fund drive be needed for building renovation or expansion? And, if special fund raising is required, who will do it? When? And how will fund raising itself be financed? The plan is not complete until you identify realistic sources of funds for all on-going activities and special programs and budget for fund raising itself.

In this kind of planning, it is useful to visit other museums to learn what different kinds of functions cost them, and to use outside museum consultants if you have no professional director yet. Business executives on your board also may have experience that they can be asked to contribute in estimating costs, evaluating alternative sources of supplies, judging the cost-effectiveness of operations and proposals, and maintaining financial controls. Your goal, of course, is not that of a business--to make a financial profit; rather, you are trying to produce a cultural payoff for your community on its investment in the museum. Nonetheless, the museum is like a business in being unable to operate very long at a financial loss. Unless some wealthy individual is willing to underwrite your losses every year, financial planning will as necessary for your museums as for the local car dealership.

Once a financial plan to provide the necessary resources for a museum is agreed upon by a board, all board members have responsibility to see that the necessary funding is secured. That may mean soliciting private contributions, lobbying for government funds, calling on corporations and foundations, and giving generously oneself. No responsible staff overspends its budget and then blithely expects the board to make up the difference. Similarly, no responsible board approves a financial plan and budget and then leaves it to staff people to find the money. And no museum lasts long without planning in detail how it will finance its operations.

TYPICAL MUSEUM BUDGET LIST

Each museum is unique, so the budget process will vary, according to the type of museum and programs provided by the museum. Therefore, the following basic budget list should not be considered as all-inclusive. Carefully consider all sources of potential income for your museum and all expenses for the programs you plan for the next year.

INCOME:
Contributions
Membership Dues
Admissions
Museum Store Sales
Special Events
Program Income
Interest from Investments

EXPENSES:
Salaries
Payroll Taxes
Fringe Benefits
Conservation
Utilities
Maintenance
Office Supplies
Supplies for Educational Program
Exhibit Expense
Insurance
Museum Store Expense
Publications (PR, brochure, etc.)
Vehicles (maintenance, gas and oil)
Cleaning Supplies
Consultant Fees
Professional Memberships and Subscriptions
Staff Travel

Remember to budget all up-front expenses for any special event, museum store stock, and programs or publications from which you expect income later.

Questions to evaluate FINANCE

1. Does the museum's financial support seem to meet the needs of the museum?

2. Are there continuing efforts to raise the level of financial support? If so, what are they and are they effective?

3. Has the museum been successful in applying to businesses, foundations, state, and federal funding agencies?

4. Does an adequate financial reporting system exist and are museum accounts regularly audited?

5. Does a clear fiscal policy and plan exist and does the budget reflect rue operating costs?

6. What is the museum's greatest financial strength? weakness?

Section V: FACILITIES MANAGEMENT

Whether you are building a new structure for a museum or adapting an old one, analysis begins with a list of each kind of activity you may need to carry on within it. Does your facility have space for offices, storage of collections, storage of supplies and materials, exhibits, a meeting room, shops for fabrication of exhibits and for cleaning and conservation of objects, a kitchen for such uses as catering receptions, an archive and research library, space for training volunteers, an audiovisual theater, and maybe a gift shop? Save yourself from the initial mistake of supposing that exhibit space is the primary consideration. Storage and work areas should equal or exceed exhibit space. The rule of thumb for allocation of space in museum structures is 40 percent for exhibits, 40 percent for storage, and 20 percent for offices and other activities.

Knowing that, now analyze the utility of the space in any building you may be offered. For example, does the space present serious problems for exhibit presentations, flow of visitor traffic, and security? Does the space allow for proper ranges of temperature and relative humidity or the protection from direct sunlight that museum collections, on exhibit or in storage, need to prevent deterioration?

If at all possible, enlist both an architect and an experienced museum professional to help you analyze an existing building for problems that may cause you grief and cost you money if you do not deal with them before starting a museum operation. Does the roof need replacing? Is the building made of something such as masonry that may enable you to use if for a museum for at least fifty to a hundred years? Is there insulation in it that will hold down utility bills? Can the wall surfaces be easily cleaned and used for museum purposes? Will the floor coverings long survive several thousand visitors a year, tracking in mud and moisture from rain and snow? Can the climate be controlled with affordable air conditioning and heating units? Does the electrical wiring meet commercial standards and government codes? Are there enough circuits for lighting exhibits, galleries, offices, and program areas as well as outside lights, security systems, evening receptions and programs, and shop equipment, without risking blown fuses or fires? Is the plumbing adequate for public restrooms and water fountains, as well as for the kitchen? What about the paint? Surfaces need to be attractive but also easy to lean and maintain.

Please avoid the assumption, however, that a history museum has to be in an old building. Unused space in a brand-new, reflective-glass-and-steel building is just as acceptable for history museums as it is for others. Whatever kind of museum you plan, a new building can more readily be made to suit your needs--but again, only if you analyze them carefully. Ideally, you will choose an architect who has museum-design experience. Since such architects are few, it is recommended that you look for one who at least is willing to study the special problems of museum design in consultation with museum professionals.

One final word of caution: It is easy to think of the building as the museum itself and invest the bulk of your resources in what is only housing for collections and programs. Be sure your budgeting takes both these essential expenditures into consideration early on.

HIGHLIGHTS OF THE AMERICANS WITH DISABILITIES ACT

Who are the Disabled?

The Americans with Disabilities Act (ADA) provides comprehensive civil rights protection for "individuals with disabilities." An individual with a disability is a person who has a permanent or temporary physical or mental impairment, *real or perceived*, that limits one or more of the "major life activities."

1. Examples of physical or mental impairments include orthopedic, visual, speech, and hearing impairments; cancer, heart disease, and diabetes; mental retardation and emotional illness; HIV disease; and drug addition and alcoholism.

2. Examples of "major life activities" include functions such as caring for oneself, performing manual tasks, walking, seeing, hearing, speaking, breathing, learning, and working.

What facilities and buildings are covered by the ADA?

Title II and Title III regulations of the ADA cover:

1. "Public Accommodations:" public accommodations are private entities that own, operate, or lease places of public accommodation. Examples include restaurants, hotels, theaters, convention centers, retail stores, shopping centers, laundromats, pharmacies, professional

offices, museums, libraries, parks, amusement parks, public and private schools, day care centers, and health spas.

2. "Commercial Facilities:" commercial facilities are non-residential facilities, including office buildings, factories, and warehouses, whose operations affect commerce.

3. "Public Entities:" public entities include any State or local government and nay of its departments, agencies, or other instrumentalities. All activities, services and programs of public entities are covered, such as State legislatures and courts, town meetings, police and fire departments, motor vehicle licensing, and employment.

Are any facilities not covered by ADA regulations?

Exceptions to the law include:

1. Private clubs.

2. Religious entities, including places of worship.

3. Private homes, if used exclusively as a residence. The ADA applies to any portion of a residence that is used as a place of public accommodation, including doors, walkways, corridors, and toiletrooms, or any other part of the residence, interior or exterior, that is used by the customers or clients of that public accommodation.

4. Places of lodging located in buildings that do not contain more than five rooms for rent or hire and that are actually occupies by the proprietor of the establishment as the residence of the proprietor.

What is generally required by the ADA for buildings and facilities?

The ADA requires that all newly constructed and altered portions of buildings and facilities for public accommodations, commercial facilities, and public entities be barrier free. The ADA also requires the removal of architectural and structural communication barriers in existing facilities where "readily achievable." Readily achievable means "easily accomplished and able to be carried out without much difficulty or expense." What is considered "readily achievable" must be determined on a case-by-case basis in light of the available resources.

1. Examples of architectural barriers include steps, sidewalks without curb cuts, close furniture or fixture arrangements, narrow doors, and toilet facilities without grab bars.

2. Examples of structural communication barriers include telephones mounted out or reach for wheelchair users, signs mounted out of sight for wheelchair users, absence of braille markings on elevator buttons, and alarms that provide only audio signals.

3. Examples of "readily achievable" barrier removal measures include installing ramps and making curb-cuts at sidewalks and entrances; rearranging tables, chairs, vending machines, display racks and other furniture; widening doorways; installing grab bars in toilet stalls; relocating telephones and signs; adding raised letters or Braille to elevator control buttons; and installing alarms with flashing or strobe lights.

What if barrier removal is not readily achievable?

If removing existing barriers is not readily achievable, alternative measures must be taken to make good, service,s and programs accessible to disabled persons.

Examples of alternative measures include providing goods and services at the door, sidewalk, or curb; relocating a service to an accessible location; providing delivery of goods at an individual's home or at an alternative accessible site; and providing an aide or personal assistant to enable an individual with a disability to obtain goods and services.

Are elevators required for all multi-story buildings?

Installing an elevator in an existing building is not required if the building is less than three stories or has less than 3,000 square feet per story, unless the building houses a shopping center, a shopping mall, the professional office of a health care provider, a terminal, depot or other station used for specified public transportation, or an airport passenger terminal.

Are historic buildings excluded by the ADA?

Historic buildings which are used for public accommodation, commercial facilities, and public entities are **not** excluded from the ADA. The law allows certain exemptions for "qualified historic" buildings. "Qualified historic" is defined as being listed on the National Register of Historic Places, or a state or local register. Qualified historic buildings or sites do not have to achieve full compliance with the requirements of the law if it is determined that doing so will "threaten or destroy the historic significance of the property." If it is determined through consultation with the State Historic Preservation Office, local government accessibility officials, individuals with disabilities, or organizations representing individuals with disabilities, that the historic significance of a building would be threatened or destroyed in achieving full compliance, the following alternative minimum standards may be used.

1. At least one accessible route to an accessible entrance.
2. An accessible entrance.
3. If the facility has toilet rooms, at least one accessible toilet facility along the accessible route.
4. Access to all of the public areas on the same level as the accessible entrance.

5. All signage, displays and written information should be located where it can be seen by a seated person.

Who will enforce the ADA and its regulations?

Because the ADA is a civil rights law rather than a building code, enforcement is accomplished through litigation. Individuals may bring lawsuits in which they obtain court orders to stop discrimination caused by architectural barriers. Individuals may also file complaints with the Attorney General who is authorized to bring suit in their behalf in cases of general public importance or where a "pattern or practice" of discrimination is alleged.

Is any financial assistance available for removing barriers?

Tax incentives are available to absorb the costs of accessibility alterations. The Internal Revenue Code allows a deduction of up to $15,000 per year for expenses associated with the removal of qualified architectural barriers.

Questions to evaluate FACILITIES MANAGEMENT

1. Are building and grounds in good repair and well-maintained?

2. Are there provisions for access and circulation for the disabled?

3. Does the museum contain roughly equal amounts of exhibit and support space? Does the space meet the museum's needs?

4. Is there adequate insurance on the building and contents?

5. How is the museum protected against burglary, theft, vandalism and natural disaster?

6. Are there attendants or guards in the museum during visiting hours?

7. Are there written procedures to be followed in case of fire, theft, visitor illness, accidents or natural disaster?

Section VI: COLLECTION MANAGEMENT

Every museum needs to develop a *collections policy*. The collections policy is a tool for sticking with your mission statement against a lot of otherwise confusing pressures. For example, suppose your museum's formally established mission is to preserve evidence of the history of your city. But then one day someone in your community comes in to announce that he wants to give the museum all the mounted wild-animal heads he has been accumulating. What is your response?

What do you do when one of your museum's trustees wants to give you a collection of excellent paintings by a fine nineteenth-century artist, or if ten years after a businessman has given his exquisite, locally made furniture to your museum, his heirs decide the want the collection back and claim it was only on loan?

In all those instances, you can say, "No, I am sorry, I would like to help you, but it is against the museum's collections policy." But you can do that only if you have a written, board-endorsed collections policy.

Often, when a group begins to operate a museum, one of the great temptations is to accept any old or valuable object, just to fill exhibit space. But a museum is not a community attic, and most particularly it is not a depository for white elephants. The collections policy starts with your mission statement and then spells out the kinds of things the museum wants and does not want, outlines what procedure must be followed for deciding whether to accept a gift or approve a purchase, and specifies what procedure must be followed for discarding anything or letting it for any reason leave the museum. Sometimes, museums specify that the director or a special acquisitions or collections committee, or the entire governing board of the museum, must formally approve before any object an be accepted, purchase,d sold, traded, lent, thrown out, or given away. That helps prevent any arbitrary action by any negligence or bad judgement. It also helps prevent hurt feelings, angered former supporters, and even lawsuits.

As a general rule, it is also recommended that the collections policy forbid accepting objects if donors place conditions on the use or ultimate disposition of those objects. Fewer disputes are likely if material is accepted on loan only for brief, specified periods of time, for use in some special exhibit or study. Otherwise, the museum should seek full title to anything it accepts or purchases, including the right to dispose of the item by sale, trade, or whatever, at the museum's discretion.

Additionally, the museum should avoid gifts that come with restrictions that limit the museum's ability to exhibit effectively. Gifts can give a museum future headaches if donors insist that all items in their collections be forever displayed together, or that a donated artifact be put on permanent exhibit. So the collections policy should also identify unacceptable restrictions on gifts.

Finally, the collections policy should specify what is to be done once an item is accepted. When an object arrives, formal record-keeping needs to begin. An *accession sheet* will identify the source and nature of each new object or collection, following which condition evaluations and documentary research should proceed as soon as possible. *Registration* is what museum people call this kind of record-keeping. Without it, things will be as hard to keep track of in the museum as they are in the average basement or attic.

Because museums differ, no one collection policy should absolutely duplicate any other. Each policy should, however, spell out rules for acquisitions (accepting gifts and loans and making purchases), for deaccessioning (removing objects in any way from the museum), and for control of collections (arrangements for their registration, care, and use). Ideally, a collections policy might cover all the following:

- Acquisition policies and procedures
- Documentation and care procedures
- Loan and borrowing provisions
- Security and insurance
- Access and disclosure commitments and conditions
- Ethics to be observed by staff and trustees
- Deaccession rules

Conservation, too, is an on-going function, because whether your collections are in storage, being studied, on exhibit, or otherwise in use, they need protection from insects, extremes of and fluctuations in temperature and relative humidity, excessive levels of light, airborne pollutants, deliberate or inadvertent vandalism, or any one of a number of other things, depending on the materials of which the artifact is made. A conservation program may be difficult for the non-professional to plan. In that case, what you should do is plan to obtain expert advice by engaging a consultant to help you plan good, general, overall protective conditions for your collections, including methods and procedures for evaluating the physical condition of each object when you get it and then periodically thereafter.

To keep your museum from spreading misinformation or trivia regarding your collection, please also plan for continuing research. Research means asking owners or donors everything they know about an object when it comes into the museum, then checking that information with other sources. It means documenting the basic facts about what an object is, while also studying the historical, artistic, or scientific context into which the object fits and which illuminates its significance.

Your plan should also provide for interpretive activities--possible devices you want to use to extend the educational reach of your collection. Some of the activities you may consider are publications, audiovisual productions, guided tours, self-guiding tours--through electronic devices and pamphlets--lectures, films, school programs, presentations to community groups, newspaper articles, programs on radio and TV, all of which can be part of the museum's overall interpretive program. You may plan to publish catalogues when you open new exhibits, for example, or create traveling displays to meet curricular needs of school programs. And as for exhibits, some can be permanent such as those that tell the basic story of your community, and others can be temporary such as a six-month special show on some particular group, event, or facet of life in your region. And from time to time, you may plan to bring in traveling exhibits from other museums as well.

Exhibit preparation, however, takes special planning. It is really an art, requiring imaginative combinations of artifacts with well-written labels, graphic material, and attractive layouts or showcases. Sound, light, and color all may enhance the effect of an exhibit or detract from the artifacts if not sensitively handled. Also, too much information can frustrate visitors as badly as too little.

GUIDEPOSTS FOR COLLECTING

From AASLH Technical Leaflet 6

The following information is designed to help and guide local historians, historical societies and history museums in developing collections of three-dimensional materials relating to the history of their communities.

Historical museums are encouraged to collect objects to supplement written and printed sources found in manuscripts, records, books, pamphlets and newspapers. Guidelines are laid down for those in charge of history museum collections. Recommendations are made concerning the random collection of everything offered as gifts by donors. Emphasis is placed upon the establishment of collections that can be used effectively for research, exhibits and loans.

REASONS FOR STARTING A COLLECTION

Two major reasons for starting a historical collection are:

1. **To preserve historically significant objects that might otherwise be lost or destroyed**

   While some objects should be collected to keep them from being lost or destroyed, such collecting should be kept to a minimum. Each item so acquired should be carefully studied to decide whether it should be made part of the permanent collection or transferred to another collection where it can be used more effectively. Random collecting of objects merely to preserve them fills up valuable storage space and uses up the time of curators that should be devoted to more important matters.

2. **To preserve objects that can be used effectively for research, exhibits, or loans**

   To be used effectively for research, exhibits, or loans in a local history program, the objects must have a direct bearing on the significant parts of the community's history. Determination of the significant parts of the locality's history, which in turn determines the kind of objects to collect, should take place before collecting is done.

POINTS TO REMEMBER

There are five major points to consider in starting and expanding a good historical collection. They are:

1. Determination of scope or extent of the collection;
2. Availability of objects within the defined scope of the collection;
3. Usability of the collection;
4. Technical problems of ownership.

1. Determination of the scope or extent of the collection

Whether the collection is being started or is already in existence, its scope or extent should be clearly defined. Such a statement should be approved by the governing board of the museum or society. Those responsible for dealing with donors and for accepting or rejecting objects should have the statement in writing for their guidance.

Points to consider in establishing the extent or scope of a collection are:

A. *Geographical boundaries*--The geographical boundaries of the town, county, village or city are a good beginning for determining the extent of the collection. But when the complexity of the locality's history is considered, it is clear that the geographical limitation can be only the beginning, and not the sole limiting factor. History, in its broadest meaning, is the story of all of man's experiences. It is obviously impossible to collect objects which illustrate every thing done by each person who has lived or is living in even the smallest community.

B. *Periods*--Certain periods in a locality's history are more significant than others, but determining the key periods takes considerable study. For instance, the period of exploration and settlement will probably be included in the definition of the extent of any collection, but strong consideration should be given to the periods of industrial growth and change, to population shifts, and to education. Furthermore, the great social and economic changes of the past 25 years will be important to future historians. It is easier to collect objects relating to a new activity when the activity starts instead of waiting for several years and then trying to obtain pertinent materials. Not everything collected has to be an antique.

C. *Subjects*--The history of the community will determine the subjects around which the collection is built. Such subjects may include, but are not restricted to, settlement, transportation, business, manufactures, agriculture, education, and the arts. Some subjects have a definite ending date while others will continue to the present. For instance, "Settlement" will have a terminal date while "Business" will not.

It is startling to find how many related topics can be developed from a major subject. For example, the subject of "Transportation" may lead to the acquisition of materials dealing with settlement, Indian affairs, military events and agriculture. How far the main subject is developed should be carefully planned to keep the collection from branching out into too many minor little-related fields.

2. Availability of objects within the defined scope of the collection

Availability of materials is a major consideration in defining the collection. There are two parts to the problem of availability: scarcity and super-abundance. While nearly every collection would be strengthened by having a selection of mint $100 gold pieces or examples of every chair made by John Belter, such acquisitions will be quite scarce. Concentrate on collecting what is available.

Super-abundance is more of a problem than is scarcity, but it can be controlled if the extent of the collection is clearly defined.

3. Usability of the collection

Although some objects are collected to prevent their loss or destruction, such acquisitions should be held to a minimum. They should be acquired with the intention of exchanging them or transferring them to another collection where they can be used effectively.

A history collection, to be really significant, should provide materials for the following purposes:

A. *Research*--A good collection should provide materials for research. This research may be for the preparation of scholarly articles by the staff, or it may be done by specialists who consult the collection for materials not available elsewhere.

Quite often the small historical collection has important materials for research by specialists. Such materials are often called "study collections". For example, a study collection might consist of 500 photographs, sketches, architectural drawings and scale models of a lock system on the Erie Canal. Obviously, all of those objects cannot be exhibited in a general history museum or society, but they are very important to the specialist on the Erie Canal.

The danger in forming special study collections is that they sometimes overshadow the main collection in importance and weaken its use in a general program of research, exhibits, and loans. This situation can be avoided if the main collection is carefully defined and new acquisitions fit into the defined limits of the collection.

B. *Exhibits*--The main collection should include materials for exhibits that show the significant parts of the community's history.

Good exhibits require objects that are related to each other or which show sequences of developments. For example, an exhibit on lighting devices cannot be effectively developed unless the collection includes representative examples of several different kinds of lighting devices. An exhibit of 15 candle molds with minor differences that only an expert can detect and appreciate means little to school children or to the public. To be really significant, an exhibit on lighting devices should include a variety of items such as camphor lamps, kerosene oil lamps, bayberry candles, matches, rush lamps, electric bulbs and miners' lamps.

On the other hand, a good exhibit on early settlement requires a variety of objects. Some of them would be a musket and powder horn, fireplace implements, woodworking tools such as axes, planes and hammers, clothing, dishes and books. These objects are not similar but when put together in an exhibit tell the story of how the early settlers lived.

C. *Loans*--Readily available materials, with little or no monetary value, should be collected even if they duplicate items already in the collection with the idea of lending them to schools or other museums.

4. Technical problem of ownership

Clear and absolute title to each article collected is urgently recommended. Consult your attorney about the wording of a gift agreement. You need a clear title for several reasons. Sometimes a donor requires special exhibit facilities for his/her objects, and demands their return when every nail, pin, letter and printed inscription do not meet his/her specifications. Too often this kind of situation hurts the collecting agency's public relations, particularly in small communities.

Lack of clear and absolute title to every item often leads to another problem. The museum stores and preserves materials for many years and then has the donor or his/her heirs appear with a letter which states the objects were left at the museum "until called for." Storage of such items takes up valuable space and consumes the time of curators. Although possession might be nine points of the law, a local history collection is dependent on the good will of local donors, and disputes over the ownership of materials should be avoided. A business-like explanation of the policy to accept only outright gifts is the best way to deal with donors. If the prospective donor does not want to give the materials outright, accept them as a loan if they can be used, and return them when the period of the loan ends.

Elimination of Objects

Eliminating objects from a collection is never easy, but it is necessary if the collection is to be used effectively. Here are some points to consider as the collection grows and objects in it are being studies for disposition.

1. Basic principles for disposing of materials

A. *Disposition* of materials should be decided by the governing board of the society or museum. It should be carried out within well-defined policies, which must be fully enforced if the collection is to be a significant part of the local historical program. But the policies should not be interpreted to justify keeping every article in the collection regardless of its condition or usability.

B. *Method*--How the materials are disposed of is also the responsibility of the governing board. It must decide whether the items are to be returned to the donor, destroyed, sold or transferred to another collection. Legal considerations and public relations will determine the method of disposition.

2. Specific suggestions

A. *The items lying outside the defined scope or extent of the collection.* Quite often a donor insists that the museum take all or none of his/her gifts. This leads to the acquisition of articles that have little or no significance in the local history program. For example, a notable local person offers a number of articles that illustrate the origin and growth of the canning industry in the town. But at the same time he/she may also offer an irrelevant collection. Obviously the former materials are worth obtaining and keeping while the latter are not. Yet the donor may say "all or nothing."

After explaining to him/her the desirability of transferring his/her irrelevant collection to another museum, and after making it clear that the collection will go to another museum, the gifts may be accepted. Keep in mind the need to have good relations with local donors who are, after all, the principal sources for new materials. Another part of the problem of disposing of items lying outside the scope of the collection involves materials already in the permanent collection. Sometimes items have historical significance, but do not relate directly to the community's history. For example, a Dutch bronze cannon dated 1655 would have little significance in a history program for Buffalo, which was not settled until after 1800, but it would be important in a history program for Albany, which was settled by the Dutch.

B. *Items inappropriate for research, exhibit or loan.* In this category are single items or parts of items that either cannot be identified or cannot be related to items already in the collection. Every effort should be made to identify such materials before disposing of them. But it is important to recognize that it is difficult to make much use of articles such as silver loving cups, bricks, odd wagon wheels or fragments of wood from the first settler's house.

C. *Items damaged beyond economical repair*. Here, careful consideration should be given to the kind and extent of the damage. The possibility of acquiring the same item in better condition is also important to keep in mind. Of course, some items will be kept despite their condition. For example, a Brown Bess musket excavated from a local fort built during the Revolution would be retained even though it was badly rusted.

A word of caution is in order in determining the disposition of damaged materials. Quite often the damaged part cannot be seen.

Another consideration in evaluating damaged or incomplete items is that of the cost of repair or restoration. Here the ultimate use of the item, its intrinsic value, and its historical significance have to be reviewed. For example, a badly damaged oil painting of Lewis Cass done by an unknown artist might cost $1200 to restore. Cass is important in Michigan history but of little significance in New York state history. Can you afford $1200 to restore a painting of a man who has no direct relationship to your local history? Or would it be better to send the portrait to the Detroit Historical Society?

D. *Items potentially more useful in another collection*. Many single items are acquired which can be used more effectively in another collection. For instance, suppose the Buffalo Historical Society obtained a Civil War sword with the inscription "Capt. John Smith, Binghamton, New York, for services at Gettysburg, July 1-3, 1863." Civil War swords are not rare and most collections include one of them. In this instance, it would be good if the Buffalo Historical Society arranged for the transfer of the sword to the Broome County Historical Society at Binghamton.

Another consideration in the transfer of materials is the advisability of keeping items in collections where there are similar items. For example, suppose the Madison County Historical Society acquired a pair of shoes worn by the Shakers. Such a Shaker item would be important in the Shaker Museum at Old Chatham but would be of little use to the Madison County Historical Society.

Of course, many single items have a high intrinsic value or are closely related to some part of the community's history and will be retained, but retention of such items should be the exception and not the rule.

E. *Items duplicated many times in the collection*. Sometimes many duplicates are collected because they are readily available. Where a school services program is under way, it is good to acquire duplicate items because of the possibility of breakage or loss.

As a rule, however, duplicated items should be transferred to other collections, sold or exchanged. Retention of several of the best specimens should be sufficient to meet any demands for research or exhibit. There are several good reasons for disposing of duplicates. They take up storage space, cost money to preserve, consume valuable time to record, and, finally, some other collection probably is without them and can use them.

ACCESSIONING OBJECTS

A museum receives objects into its collection through donation or purchase. The formal collection policy of the museum should be referred to for guidance whenever an object is considered for donation.

A deed of gift is signed for each accession that is accepted into the collection. See Appendix for sample. An accession is defined as an object or group of objects given by one person at a single time. The *Deed of Gift* transfers ownership to the museum. All of the objects in the donation are listed and the donor or donors sign it. Someone from the museum with the proper authority signs for the museum. A copy of the *Deed of Gift* is given to the donor and a copy is retained for the museum's object files.

NOTE: The museum staff should not make appraisals of donated objects. It is considered a conflict of interest by the IRS to do so. The donor should receive an appraisal from a licensed appraiser.

The donation is assigned the next accession number in the accession book. The donations are listed in the order in which they are donated to the museum. The accession number, date, short description of the object, and donor name and address are listed in the book. Accession numbers usually consist of three parts: the year the object was obtained, the number of the accession in that year, and catalog numbers of the object.

Example: 94.5.1-12. The object was donated in 1994. It was the fifth accession or donation of that year, and there were 12 objects in the donation.

For those objects discovered in the collection without a donor or documentation or the year of donation is unknown, you may want to created a *no donor list*. This list does not have a year designation, but rather it starts with "0", meaning no year of donation.

After accessioning the object, the next step is to make an object file. The accession number is written on the file tab and the *Deed of Gift*, correspondence, and any other materials are put into the file. The file is kept in accession number order, and all future correspondence, research, or other paperwork is placed in this file.

CATALOGING

Objects should be cataloged as soon as possible after they are accessioned. It is very easy to put off cataloging and often vital information is lost. The cataloging process consists of:

1. Cataloging
2. Filling out the condition report
3. Marking the object with its accession number
4. Photographing the object
5. Storing the object

In preparing catalog cards, the following information should be included:

Accession Number: This is the number assigned to the object at the time of donation.

Accession Date: The date the object was donated. It is the date on the *Deed of Gift* and in the accession book.

Cataloging Date: The date the object is cataloged.

Source: The donor's name and address.

How Acquired: Was the object donated, purchased, a bequest, or unknown?

Dimensions: Measure the object in inches and centimeters, usually at its highest, widest, and deepest points.

Category and
Classification: Usually each type of museum (art, history, natural history, etc.) has its own list of categories and classifications.

MARKING THE OBJECT

Every object is to be marked with its accession number. You should mark the object in an inconspicuous spot where it will not be rubbed off. There is a marking methods guide in the Appendix which explains where the number should be placed.

Marking Instructions for Wood, Metal, and Glass

Paint a strip of white acrylic paint directly on the object just large enough to hold the number. When dry, write the number on the paint strip with black ink. After it is dry, cover the number with a coat of clear lacquer.

This method is used for wood, metal, glass, and leather. Each object should be carefully examined before a decision is made on where to apply the number. Sometimes with glass, the white paint will show through. Try writing the number directly on the glass and covering it with a layer of lacquer; or apply some lacquer and write the number on it.

Use this system for leather unless you feel that the paint would damage the object. In that case, write the number of a small tag and attach it to the object.

Marking Instructions for Textiles

Textiles are marked by using a strip of cotton twill tape. The number is written on the tape and the ends are folded under to protect the textile from any damage from the ink. Another method is to paint a strip of white paint on the tape and write the number on the tape. A coat of clear lacquer is painted over the number and the paint. The number is more legible using this system. The tag is sewn onto the textile on one corner. It is sewn at the zipper edge in pants and skirts, at the opening of the collar for dresses, blouses, and shirts. The tags are sewn on with ball point needles using silk or 100% cotton thread.

Marking Instructions for Paper

Paper objects are marked with a soft lead pencil. In books the number is marked inside the back cover. Documents are marked in the lower right hand corner. Drawings and prints are marked in the lower right hand corner or on the back.

ARTIFACT CATEGORIES AND CLASSIFICATIONS

from *Nomenclature* by Robert Chenhall

Category 1: Structures
- A Building
- B Building Fragment
- C Site Feature
- D Unclassified Structure

Category 2: Building Furnishings
- A Bedding
- B Floor Covering
- C Furniture
- D Household Accessory
- E Lighting Device
- F Plumbing Fixture
- G Temperature Control Device
- H Window or Door Covering

Category 3: Personal Artifacts
- A Adornment
- B Clothing
- C Clothing, Footwear
- D Clothing, Headwear
- E Clothing, Outerwear
- F Clothing, Underwear
- G Clothing, Accessory
- H Personal Gear
- I Personal Symbol
- J Toilet Article

Category 4: Tools and Equipment
- A Acoustical T&E
- B Agricultural T&E
- C Animal Husbandry T&E
- D Armament T&E
- E Armament T&E, Firearm
- F Armament T&E, Edged
- G Armament T&E, Bludgeon
- H Armament T&E, Artillery
- I Armament T&E, Ammunition
- J Armament T&E, Body Armor
- K Armament Accessory

Category 6: Transportation Artifacts
- A Aerospace Transportation
- B Aerospace Transportation Equipment
- C Aerospace Transportation Accessory
- D Land Transportation
- E LTE, Animal-Powered
- F LTE, Human-Powered
- G LTE, Motorized
- H Land Transportation Accessory
- I Rail Transportation
- J Rail Transportation Equipment
- K Rail Transportation Accessory
- L Water Transportation
- M Water Transportation Equipment
- N Water Transportation Accessory

Category 7: Art Objects
- A Commercial Decorative Art
- B Original Art

Category 8: Recreational Artifacts
- A Game
- B Public Entertainment Device
- C Recreational Device
- D Sports Equipment
- E Toy

Category 9: Societal Artifacts
- A Behavioral Control Device
- B Ceremonial Artifact
- C Exchange Medium
- D Governmental Artifact

Category 10: Packages and Containers
- A Product Package
- B Unclassified Container

Category 11: Unclassified Artifacts
- A Artifact Remnant

B Function Unknown

CATALOG INFORMATION

Accession Number: ____________________

Accession Date: _______________________ Cataloging Date: ______________________

Source (Donor): ____

Address: ____

____ Phone: ______________________________

How Acquired: ____

Dimensions: Width Length Height Diameter Weight

English: ______ ______ ______ ______ Lbs: ________

Category: ____________________________ Classification: _________________________

Object: ____

Principal Materials: ____

Color: _________________________ Date made or manufactured: _______

Description: ____

____

____

Condition: ____

____

Background History (Provenance): ____

____

Location: ______________________ Cataloger: __________________________________

Cost/Value ____________________ Date of Insurance Appraisal: ____________

COPYRIGHTS

The following guidelines are given for objects being accessioned into a collection and that have a copyright:

1. Pay special attention to possible copyright issues when acquiring objects for the collection.

2. The revision of the federal copyright law became effective January 1, 1978. This law emphasizes that copyright exists at the moment of creation and resides with the creator, unless otherwise changed. Donation of the object does not necessarily transfer the copyright.

3. When an object that appears to be covered by copyright is donated to the museum, it is important to establish whether or not the museum wants the copyright. If it does, find out who holds the copyright and if it passes to the museum upon donation. If the museum does not want the copyright or if the copyright is acquired by the museum, it should be so noted on the *Deed of Gift*.

4. If the holder of the copyright does not wish to transfer copyright, you should negotiate for limited use of the copyright where it pertains to regular museum functions. These functions might include: the right to reproduce the object in exhibit catalogs; the right to print postcards or posters for sale; and the right to grant reproduction rights for educational publications.

5. The results of any negotiations will be noted on the *Deed of Gift*.

LOANS

Incoming Loans

An incoming loan form is filled out when the museum borrows an object from another institution or person. A copy of the loan form is in the Appendix. The lender's name and address, purpose of the loan, method of shipment to the museum, the value of the object, and the dates of arrival and departure are filled out. The loan form is signed by the lender and the appropriate representative of the museum. The lender gets a copy and a copy is kept in the current incoming loans file.

Outgoing Loans

An outgoing loan form is filled out when an object is being loaned by the museum to another institution or person. A copy of the loan form is in the Appendix. The borrower's name and address, purpose of loan, method of shipment, and dates of shipment from and to the museum are filled out. Accession number is included in the description of objects. A value for the object is recorded on the form for insurance purposes. The borrower and the appropriate representative of the museum sign the form. One copy goes to the borrower and one is filed in the current outgoing loan files.

MUSEUM
Address

L O A N A G R E E M E N T
Incoming

Name of Lender/Owner ________________________________ Telephone _____________

Address ____

City ____________________________ State _ Zip ___________________

Date of arrival to Museum ___________________ Date to be returned ___________________

Purpose of loan ____

Method of shipment ____

Description of Items: (Attach Continuation Sheet, if necessary) ___________________

Item Condition Value

____

____

Objects loaned to the museum (name) will receive the same degree of care and preservation given to objects owned by the Museum. Objects will be insured by the Museum. The insurance policy contains the usual exclusions of loss or damage due to such causes as earthquake, war, flood, gradual deterioration, faulty or defective workmanship or nuclear damage. A certificate of insurance will be sent upon request.

If the Lender elects to maintain his/her own insurance, the Museum must be supplied with a certificate of insurance naming the Museum as an additional insured or waiving rights of subrogation.

Costs of transportation and packing will be borne by the Museum unless the loan is at the Lender's request. The Lender will assure that said objects are adequately and securely packed. Objects will be returned packed in the same or similar materials as received.

Unless otherwise notified in writing, the Museum will release the objects only to the Lender. In the Museum's efforts to contact the Lender, within a reasonable period following the expiration of the loan, are unsuccessful, the objects will be placed in storage at the Lender's risk and expense. In case of change of legal ownership during the period of the loan, the new owner is required to establish his legal right by proof satisfactory to the Museum.

Lender ____ Date _____________
Signature

Museum (name) ___________________________ Title _____________ Date _____________
Signature

Questions to evaluate COLLECTIONS MANAGEMENT, CONSERVATION AND EXHIBITIONS

1. Are the museum's collections of value to the population group served?

2. Are collections appropriate to the purpose of the museum?

3. Does the museum have an adequate cataloging system?

4. Are collections records kept in a secure place? Are duplicates kept elsewhere?

5. Is the size and quality of storage space adequate?

6. How are the museum's collections made accessible to the public?

7. Do collections appear to be in generally good condition?

8. Are collections protected from detrimental effects of light, and drastic changes in temperature and humidity?

9. How are exhibitions lighted?

10. Does the museum personnel have training in the handling of objects?

11. Does the museum utilize the services of outside conservators?

12. Are exhibition areas sufficient for the museum's purpose?

13. Are exhibitions designed and presented in an attractive and informative manner?

14. Is there a program of changing exhibitions? If so, who decides what exhibits the museum will have?

15. Does the museum send out traveling exhibitions? If so, what types of exhibits? Who uses them?

16. Is there a written policy on loans from the museum's collections and on objects borrowed by the museum?

Section VII: PROGRAMS

MUSEUM TOURS

Excerpt from Smithsonian Institution Traveling Exhibition Service (SITES)

A good exhibition is in essence a story. It should have emotion and connect with the visitor. It should have relevance to the visitor's life. It also has structure: a beginning, a middle, and an end. Most importantly, it has a plot or a theme. The objects in an exhibition tell a story. For each visitor that story may be different. Your job as an "Interpreter" is to find a theme that is relevant to the visitors and provide them with an opportunity to tell their story.

The visitor's experience can be enhanced and made more meaningful with some simple and easy preparation. Good interpretive programs stimulate a dialogue. Whether it is a tour, a gallery activity guide, or pre-visit classroom materials, these are simply tools to elicit the visitors reactions, opinions, memories, thoughts, and conclusions. In developing these interpretive materials and programs, always keep in mind that the "meaningful experience" is one that is interactive. In other words, it involves two-way communication and critical thought--not simply a lecture or an informational brochure.

Think about it--creating meaningful experiences for visitors is an investment. When visitors are actively engaged in looking and talking about the exhibition from their own point of view, they will take with them a deeper understanding of the exhibition themes. A successful interpretive programs serves as a catalyst for life long learning. After visiting an exhibition, the visitors continue to think about the issues raised in the exhibition and apply this new learning to their everyday life.

The Role of the Docent, Explainer, Interpreter, or Tour Guide

The person who gives exhibition tours could have many different titles. They can be paid or unpaid members of the staff. This does not change the essential role that this person plays in structuring and stimulating meaningful visitor experiences.

Before we define the role of the interpreter, let's think for a moment of the role that the exhibition plays in our lives. An exhibition gives us an opportunity to slow down. To really take a close look at something that we recognize but have never really considered. Exhibitions also tend to raise the level of importance of the subject matter. If you put a Styrofoam cup in an exhibition case and asked people to really look at it and think about it, the may begin to see that this object tells us about our culture and about ourselves as Americans that they never thought about before.

Your role as an interpreter is to be a bridge between the cultural values of the objects and the visitor who brings with them their own values and perspective. Your task is to connect the exhibition to the everyday life of the visitor. In raising issues, asking questions, telling stories, eliciting memories, you are bringing the exhibition to life. You are involving the visitor in the themes, issues, and objects presented in the exhibition in an active dialogue and thinking process. If the result of your tour is that a visitor comments, "I never thought about it that way" or "I never realized how much my experiences with objects in the exhibition have shaped my life", you have done your job.

Remember, you are playing the role of the facilitator, not the expert. Although you must know the content of the exhibition very well, you must also know how to use that knowledge to shape a conversation rather than a lecture.

Speak From the Heart and Listen From the Heart

Before you begin to put a tour together, look at the objects presented in the exhibition. Be a visitor! What aspects of the exhibition most interest you? What objects immediately catch your eye? Remember the moments when you looked at the objects. The ideas and thoughts that you first had will guide you in developing your tour.

Know the Audience

Remember, visitors to exhibitions are looking to learn something and to have fun. Don't assume that your visitors are "blank slates." Even a group of kindergartners bring experiences and knowledge with them. You must remember that each individual is different and each group is different. This is one of the most difficult aspects of preparing tours. You never know exactly what to expect from the group. The key is to be flexible in your presentation and take time to give an orientation in which you ask basic questions to learn from the group what their expectations are and what they are "bringing" with them in terms of previous experiences, ideas, knowledge, and perceptions.

But don't forget the fact that people want to have a good time during their visit. Creating a fun experience for visitors will ensure an appreciation for the values and issues presented by an exhibition.

Activity Suggestion: Visitor Observation

Before you get started planning your tour, it is a good idea to begin to understand who visits the site and who potentially will visit the exhibition.

Spend some time watching visitors go through an exhibition. Watch visitors move through the exhibition. Ask yourself the following questions:

Who is visiting?
Are they men, women, children, families, senior citizens, school groups?
What are their reactions?
Are they having conversations with each other?
What aspects seem to be most popular?
Why are they visiting?
Are people visiting alone or in a group?
Are different sections of the exhibition more popular for a youth audience?
For an adult audience?

Building Your Tour

One of the most frustrating aspects about preparing tours is that cannot use all the information and knowledge that you've gained through your research. It is impossible to stuff all that information into one 30-45 minute tour. And besides, do you really want to funnel all that information into your visitor's head? Do you think they can really use all that information? You have probably had learning experiences that were overwhelming and quite frankly boring because there was too much information in too little time and most of the information was not what you needed or wanted to know. This is sometimes called "information anxiety" or "information overload". You know when this is happening in museums when you feel yourself getting very tired, your mind drifts to the grocery shopping list or your next meal. This is exactly what you want to prevent during your tours.

The goal is to get your visitors excited about the exhibition. If you overwhelm them with terminology, dates, and historical facts that have no relevance to them, they will most likely forget this information before they even walk out the door. If you instead, inspire them, excite them, and engage them in a conversation by welcoming them to share their own experiences, ideas, and memories, and waving in the information when relevant, you are in a better position to challenge them to apply this new knowledge and understanding to their lives.

Selecting a Theme

A good tour is not a string of facts and information, but rather a well-organized exploration of a primary theme under which there are sub-themes that are related. The first step in preparing your tour is to select a primary theme. Your theme will guide you in structuring your tour and selecting the objects and issues to discuss.

Activity Suggestion: Selecting a Theme

Start by listing the aspects about the exhibition that really excite and inspire you. Look for the objects and issues that evoke emotion. How can those aspects and objects be formulated into a theme?

Once you select a theme, ask yourself:

Does my theme answer the "so what?" question?
Why should people care about this theme?
Is my theme broad enough so visitors can apply it to their lives?
How can I challenge visitors to apply this theme?

The Power of Objects to Tell Stories

What makes an exhibition different from simply reading a book? The answer is the objects. Objects and artifacts are not mute--they have stories to tell and it is your role as an interpreter to evoke those stories. You have a unique opportunity during your tours to teach visitors how to closely examine objects and artifacts to find their stores. by encouraging looking and structuring a series of questions, you are teaching "visual literacy." Although the term literacy has traditionally referred to written word, it is a helpful metaphor for a valuable skill that you can build among the visitors.

An exhibition gives us an opportunity to look at and examine some objects that may be familiar but that we've never really took the time to critically analyze. You may also want to add objects to a "hands-on" collection that can be carried with you on the tour.

Activity Suggestion: Object Exploration

To begin to explore the power of objects, design an "object-based exploration" for yourself. Choose an object in the exhibition and take yourself through the following activities and questions:

<u>Visual Examination</u>
Look closely at the object and describe it:
What color is it? What material is it? Does it look old or new? Does it look heavy or light? If there is writing or images, describe them.

<u>Cognitive Memory Questions: What Do You Already Know About the Object</u>
Do you recognize the object?
What is it and what is its' function?
Has its' function changed over time?
Is there anything significant about the wording and images on the object?
What time period do you think it is from?
Why do you think it is shaped/designed the way it is?

<u>Critical Examination and Conclusions</u>
What was the designer of this object thinking? What do you think their objective was?
What does the object tell us about American culture (or the culture from which it originates)?
If you could re-design the object, would you make changes? Why or why not?
Compare and contrast the object to objects from the past or to the present?
Why is this object in the exhibition?
What story does this object tell?

Asking Questions

"Are there any questions?" is typically the only question asked during a tour--and it is typically at the very end of the experience. Have you noticed that there are usually very few and often no questions asked?

You probably noticed that the object exploration was conducted mainly by asking questions. One very effective way to engage your tour group in a dialogue is to use the "inquiry method". Although this takes some practice and is much more difficult than simply lecturing, it is well worth the effort. Not only do questions involved the audience, they set the tone of the tour to be one of informal discussion, and for you, the interpreter, to learn from you audience as well as them learning from you.

There are different types of questions that elicit various levels of response based on the type of thinking that goes into formulating the answers. For example, asking "What is this object?" is a very different type of questions than "If you could re-design this object how would you change it?" The thinking required to answer each questions is either based on what the visitor already knows (the cognitive "baggage" that they bring with them to the tour) or asks them to formulate a response based on new thinking and new knowledge. The goal of your tour should be to ask different types of questions, laying new information on the knowledge that the visitor brings with them and then challenge them to make a "knowledge-based" evaluation.

Types of Questions

There are different types of questions that can be used to reach a goal of deeper and deeper critical thought. These questions can be "layered" during your tour so that by the end of the tour, the questions that you ask involve using new knowledge to formulate new perceptions and understanding.

Aschner/Gallagher System of Classifying Questions

Cognitive/Memory Questions
Ask for what you already know or can see. Answers involve simple recall and are either right or wrong.
Example: How is this object used? Does anybody know what type of object this is?

Convergent Questions
Ask you to do something with the information you already have or can see. Find similarities, differences, patterns, and relationships. They ask you to categorize, to organize information, to find central them.
Example: How is this object different/similar from the one we las saw?

Divergent Questions
Ask for new ideas, for inferences. They are open-ended, meaning there is no one right answer. To answer one must gather information from past experience, link it to information being explored in the exhibition and create new understanding and interpretations.
Example: Why do you think we see this object used as a symbol? What symbolic message does it send?

Evaluative Questions
Ask for judgments, choices, or conclusions. Answers must not be casual opinions; to be valid they must come at the end of time spent considering the subject.
Example: Do you think it is worth the effort to preserve this object? Why/Why not?

The Concept of "Wait Time"

When you are using questions as an interpretive tool in your tour, you must also employ the concept of "wait time". Studies have shown that when teachers ask questions in the classroom they wait less than 2 seconds for a response before they give the answer. Although it sometimes can be uncomfortable to wait in silence, it is important to give your visitors time to think to answer the question you have posed. Count to your self at least 8 seconds before moving on. You will find that often the most interesting responses come after a longer "wait time."

Logistical Concerns

Time and space are the two main logistical concerns to consider. The difficulty with doing "dialogue-based" tours is that if you are successful, your audience is engrossed in conversation and you may not get to everything you hoped to cover. Keeping to a time schedule is important, not just because it is what you advertised, but because people will get tired. If your tour goes over time you might want to conclude and ask people if they would like to stay longer to discuss other issues (this may not apply to school groups as they are usually on a stricter schedule).

Space limitation is important to consider because it directly affects your ability to look at objects and examine them in the path that makes sense for your theme.

The ideal number for group tours is usually no more than fifteen people. This allows for a group conversation with full participation. However, you cannot always control this (especially with school groups). Remember that you can always use the dialogue approach no matter how large the group is, you just may not be able to cover as much material with a large group.

You may also want to thin creatively about how you can split groups up into smaller sub groups. Plan another activity for the first group while the other half is on their tour.

Communication Techniques

We communicate with each other on a daily basis and most of the time it comes easy to us. However, most of us feel a little nervous about presentations or lectures. Once you begin to think about your tour as a conversation rather than a lecture, you can begin to visualize it as a less formal exchange and, hopefully, your will be a bit more relaxed.

Although there are some basic communication skills that you might want to strengthen as you prepare to give tours, remember that you already have many of these skills--they just need adaptation for the use of tours. Following is a list of communication tips that will help you to strengthen your communication skills.

NON VERBAL COMMUNICATION

You say as much with non-verbal communication as you do with words. You want to work on staying focussed on your audience throughout the tour, because if you are distracted, lose your train of thought, or get nervous, the visitors can pick up on it through your non-verbal communication.

Eye Contact

Establishing and maintaining eye contact with your visitors is one very important way to connect with them. Make sure that it is natural and that your are not trying too hard--you may wind up staring at them which makes most people feel uncomfortable. Using good eye contact will also give you clues as to whether you are keeping the interest of your audience. Try to maintain eye contact with the whole group and respond to quizzical, distracted, or bored looks on people's faces.

Facing the Audience

Because tours are less formal than lectures, the audience is often scattered around you rather than seated in chairs, theater style. This is good because it breaks down the wall between you and the visitors and creates a more comfortable, easy-going environment in which you are a peer rather than "the expert." The down side to this is that sometimes members of your tour can not hear you because they are standing to your side or even behind you. Try to place yourself in a position where the entire audience can see your face.

Gestures

Most of us use hand gestures to emphasize a point. If it is something you do naturally in conversation, then continue to do it during your tour. Just be careful not to get too close to the objects. Remember you serve as a model for appropriate museum behavior so leaning on objects or touching the glass cases is not a good idea. Be careful that your gestures during tours are not distracting--don't put your hands in your pockets, jingle coins, fidget, twist rings, shuffle o sway back and forth. Make sure that you exhibit good posture as slouching sends a signal that your are not professional.

Smile

A smile is a non-verbal message that puts people at ease--especially at the beginning of your tour. It is also the best way to show that you are having a good time--and if your are, chances are your visitors are too.

VERBAL COMMUNICATION

Voice Clarity and Range

Your voice can be used to create a lively and exciting presentation by ensuring that it is clear and loud enough for visitors to comfortably hear. You can also vary your voice to show emotion or the emphasize a point. Make sure that you don't sound "canned" like a commercial but that your range in voice is natural and engages the audience.

Volume

You may not need to raise the volume of your voice during tours especially if the acoustics in the room are good and you have a manageable sized group (15 people or fewer). If you do not have an ideal environment or naturally have a soft voice, you may want to practice in the space before your tour. Have a friend stand in different places and at varying distances while you speak to learn how to adjust your voice so they can hear you.

Enunciation

Sometimes it is not the volume of your voice that is most important but the way in which you enunciate or articulate words. You want to make sure you are not mumbling or letting your voice drift off at the end of words or sentences.

Verbal and Non-Verbal Pause

You want to make sure that you are clear in your verbal presentation and don't clutter your tour with "um" "you know""like" or other types of pauses that disrupt the flow. Your tour should have a smooth flow. If you find that you can't find the right word at the right time, don't be afraid to have a silent pause while your gather your thoughts. Often this silence seems much longer than it really is and it does not interrupt the tour.

Activity Suggestion: Building Your Communication Consciousness

Very Often we are not aware of our non-verbal and verbal communication style. Everyone is different and you want to develop your own communication style for your tours. However, you want to eliminate any distracting aspects of your style before you begin giving tours. One way to practice is by recording your voice and/or video taping yourself.

develop a short (5-minute) lesson or speech and record yourself. Critique yourself based on the above checklist. Work on ways to eliminate the distracting things that you may do by trying to catch yourself before they happen. Soon you will find that you will strengthen the positive aspects of your style and eliminate the distractions.

STRUCTURING YOUR TOUR

A tour, like a good story, has structure. It has a beginning, middle, and an end. Following is a list of the various components of a tour.

Introduction

it is important to welcome your visitors and create a comfortable environment for them. There may be some time before the tour officially begins when you can mingle amongst the group to begin to get to know them. You can ask where they are from, how they found out about your site and the exhibition, what their expectations might be. This may also be a time to ensure that visits to the restroom, coatroom, and water fountain are taken care of. To start your tour, you would of course introduce yourself and who you are. It will probably help if you wear a name badge. You will also introduce your site briefly so people know where they are.

It is important to provide an **advance organizer** or an overview of how you plan to spend the next hour. Let the visitors know your strategy or your plan.

Example Advance organizer

"We have about forty-minutes to spend in the exhibition. We'll stay here for a few moments and then we'll go through the exhibition and conclude on the other side of the room. I have chosen to focus on the theme of . . . But before we begin, I want to ask you a question." (see orientation).

You may also want to tell visitors that the tour will not be a lecture, it will be a conversation and that you will be asking them questions as well as giving information.

Orientation

The orientation is different from the introduction in that you are beginning to engage the visitors' mind at this point. The goal of your orientation is get a sense of the knowledge that the visitor has brought with them and to get them excited about learning more. You can do this in any number of ways. A good way to start is to ask them a "hook" question that anyone can answer and that does not have "right" or "wrong" or "yes" or "no" answers. These questions also get people talking and bring the m in or "hook" them to the theme.

Theme Development

The Body of your tour is focused on developing your theme. Remember that your tour should not be a disjointed string of facts and information but a focused exploration of a them. Make sure that there are clear **transitions** from one part of the exhibition to the next. Reintroducing your theme as you leave each part of the exhibition and providing mini "advance organizers" for the next part of the exhibition will help with the flow of the tour.

Conclusion

The conclusion of your tour is as important as the introduction. Without a good conclusion, you've missed an opportunity to make your theme relevant and apply it to the world outside of the exhibition--you also leave the visitors hanging. It's like missing the end of a good movie. The conclusion should tie it all up. It should re-visit the theme and challenge the visitors to continue thinking and looking for examples of your theme in their lives. The conclusion is also a chance for you to test yourself and the visitors. You can ask the same question you asked in your introduction to see if thoughts, opinions, perceptions, even values have changed during the tour.

Checklist of a Successful Tour

Use the checklist below for self-evaluation or for formal evaluation of others' tours.

Y=yes NA=not used or not applicable NI-needs improvement

INTRODUCTION/ORIENTATION

Warmly welcomed visitors to the site/exhibition
Clearly introduced yourself and the site/exhibition
Dressed in a professional and neat manner
Created an informal and friendly environment
Gave an *advance organizer* that clearly oriented the group

TOUR MANAGEMENT/COMMUNICATION SKILLS

Physically orientated your self so visitors could see and hear
Focussed on tour/visitors despite distractions
Tour was the appropriate length of time
Spoke in a clear, audible voice and enunciated
Used voice to communicate enthusiasm and create interest
Non-verbal communication strengthened tour rather than create distractions
Gave all tour participants a chance to be involved

INTERPRETIVE TECHNIQUES

Chose a theme that was interesting and relevant
Used questions to stimulate dialogue and critical thinking
Gave visitors time to answer questions
Tour involved looking at the objects and examining them
Geared tour for the appropriate age level
Clearly introduced them and created good transitions throughout tour
Facilitated a dialogue amongst visitors
Effectively used storytelling techniques to involve visitors
Encouraged visitors to really look and examine objects

CONTENT

Was knowledgeable in the content of the exhibition
Clearly explained complex terms and topics
Provided opportunities for visitors to share their previous knowledge
Questionable statements or concepts:

What was the strongest aspect of the tour?

What was the weakest aspect of the tour?

ADDITIONAL NOTES

PROGRAMS FOR YOUTH AND FAMILY AUDIENCES

Expectations for Youth Audiences at Different Grade Levels

You may have had many experiences (both professionally and personally) with children at different age levels and have a very good idea as to what to expect from them. The following charts should reinforce your prior knowledge and might give your some new ideas.

Although each individual is different and brings with them various levels of knowledge and understanding, general information about children at each grade level is available.
Charts are base on Shoemaker, Marla K., "Watching Children Grow," *The Docent Educator*, (Vol. II, No. 1, Autumn 1992).

Grade/Age	Characteristics	Helpful Hints
Pre-Kindergarten - 2nd Grade	short attention span vivid imagination like to pretend physically oriented more than verbally oriented strongly identify with their name	Employ activities that allow children to discover things--don't tell them, ask them Provide children with objects to touch and describe (ask children to look at an object for a few seconds, then turn away and describe it). Ask children to solve a riddle. Tell stories. Give children a mystery object to find and describe.
3rd - 6th grade	love being challenged to find objects or clues avid observers eager to learn new things like to talk work well on independent assignments	

Grade/Age	Characteristics	Helpful Hints
6th - 9th grade (adolescents) 3rd - 6th grade 6th-9th grade (adolescents)	aware of their appearance peer centered like to work in groups distrusting of adults have an uninterested air about them--seem like they don't want to learn or don't care	Treat adolescents with respect and as adults. Give them group oriented assignments--worksheets can work well. Ask open ended questions that allow them to express their opinions. Ask pointed questions. Be sure not to take their whispers, giggling, and imitating too personally. Don't take ourself too seriously--keep your sense of humor. Give them some time to visit some or all the exhibition on their own without structuring their time. Never ask them to sit on the floor in a circle.

Grade/Age	Characteristics	Helpful Hints
10th - 12th grade (young adults) 3rd - 6th grade 6th-9th grade (adolescents)	strong opinions about what they find interesting and relevant to their lives longer attention span like doing activities alone or with friends peer centered often compelled to challenge the status quo	Let them express their opinions and provide opportunities for them to give feedback. Feel free to express our opinion and why you feel the way you do. Ask a provocative question or make a provocative statement at the beginning of the tour or program. Ask the same question at the end of the tour or program to test if opinions, values, perceptions have changed. Create a debate over a value-laden or emotional issue. Build in some flexible or free time to their visit. Employ them as volunteers to guide younger groups.

Grade/Age	Characteristics	Helpful Hints
Families	receive information from each other learn through conversation--social interaction composed of various ages generally have less time to spend at the site need to know where bathrooms, water fountains, food concessions are located	Be clear about the length of time the program/tour will take. Make sure you address both children and adults when asking questions. Be sensitive to the fact that adults accompanying children may not be their parents. Assign families a task and encourage adults and children to answer questions, solve problems, or examine an object together. Tell children that their "job" is to assist the adults in solving a problem or answering a questions. Don't be insulted if a family must leave midway through the program/tour.
3rd - 6th grade		
6th-9th grade (adolescents)		

PRACTICAL PREPARATION FOR YOUTH FIELD TRIPS

Tours are the most popular form of educational program for school group visits to exhibitions. You may already have a great deal of experience bringing school groups to your site, if so, the following checklist could be used as a reminder.

If you are planning to "market" an exhibition to schools, you may want to follow the guidelines below in preparation for student visits.

The first step in planning for schools to visit an exhibition is to publicize it to the schools. Send a brochure and a letter to the principals of the schools in your local area with at least a month prior notice. If you have the exhibition in the summer months, you can send the same information to youth group leaders, Girl and Boy Scout Councils, 4-H Clubs, summer camps, and local libraries.

Whether students will be formally guided through the exhibition by an interpreter or self-guiding, they will need to receive the following information prior to their visit:

1. hours of operation
2. directions/map
3. bus and car parking facilities
4. admission fees, if any
5. appropriate age/grade levels for the exhibition/program
6. telephone number and address
7. length of the program/visit
8. maximum and minimum number of students and number of required chaperons (suggest between 10 and 30 students with 1 adult chaperon per every 10 students)
9. brief and exciting description of the program
10. regulations about wearing name-tags, photography, food, etc.
11. a brief paragraph describing the on-site program and additional resources available to teachers and students
12. a free pass or, if admission is already free, an invitation for teachers to come for a preview visit (you may also want to schedule a teacher's open house prior to the exhibition opening or when it first opens).

DEVELOPING ON-SITE MATERIALS FOR YOUTH AND FAMILY AUDIENCES

If you are not planning to offer tours at your site, you may want to develop some materials that provide a self-guided experience for youth and family groups.

These written materials do not have to be expensive to produce and often can be developed on a computer and reproduced on a copy machine. They can be distributed to groups prior to their visit or they can be offered at your site.

Examples of on-site materials include:

Treasure hunts
Gallery activity sheets
Floor plans with a suggested self-guided tour that poses questions to think about

Example Gallery Activity Booklet

An example of a Gallery Activity Booklet follows. It can be sued directly out of the Manual or you can adapt it to suit the specific needs of your site and audience.

The following example is geared for families visiting with children ranging from 5 through 12 years of age. Younger children will require more assistance with the booklet and older children may want to complete this in teams. Visiting school groups can also use it in lieu or addition to a tour.

Directions for use:

1. Duplicate the following 4 pages on colored or white paper, double sided (back to back).
2 Fold each page in half and slip the inside page into the cover page.

Note: the page numbers are not in correct order in this Manual to ensure that they are in correct order when they are in correct order when duplicated.

3. Make sure you have plenty of pencils and clipboards available (you can make clipboards out of cardboard and binder clips).
4. You can divide groups of students into teams or partners to complete the activity booklet.

PRE- AND POST-VISIT ACTIVITIES

Activities and lesson plans that can be conducted in the classroom before or after a field trip really help to strengthen the learning of the subject matter. You may want to research your local school curriculum and gear lessons and activities to specific grade levels and subject areas that relate to the broad themes of the exhibition.

Pre- and post-visit materials that support the exhibition can be as simple as providing teachers with a glossary and brief suggestions for activities or can be as lengthy as developing a manual that accompanies the exhibition.

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Questions to Evaluate: PROGRAMS

1. Do programs relate to the stated mission/purpose of the museum?
2. Do programs indicate that the museum is utilizing its collections and resources in the best interest of the public?
3. Are educational programs organized for a variety of audiences (i.e., school groups, senior citizens, minorities, etc.)?
4. Are educational programs coordinated and implemented by volunteers or staff?
5. Does the museum participate in any type of joint educational programs with local schools, colleges, or other organizations?
6. Are museum collections available for research?
7. Does the museum maintain a library, archives, and/or photography collection? Are these open to the public?
8. Does the museum conduct research?
9. Does the museum have a publications program?

Section VIII: PROSPECTS FOR SUPPORT

It is important to analyze the *prospects for support* of your museum to assure its success in the future. If the public isn't interested in what your museum is doing and be and if no one in your community will contribute the necessary financial backing, *you can have excellent collections and an entirely appropriate building without being able to maintain a museum at all.*

Here is how to analyze potential support for your museum.

First, if you have been offered a collection, see whether whoever made the offer--perhaps a wealthy private donor or group--would also contribute an endowment fund to provide for care of the collection or rehabilitation and maintenance of the building. An *endowment fund* is a sum of money for permanent investment, the annual interest from which is used to support a museum's on-going operations and activities. Or if the original donor has given to the limit, would someone else establish an endowment fund?

Remember that the costs of acquiring a collection are only the start of a museum's expenses. Money must also be available for routine costs such as staff salaries, janitorial service, trash hauling, roof repair, heating and air-conditioning, lights, telephones, postage, typewriters and typewriter ribbons, building exhibits, and son on. If no endowment fund is available, or if interest from the one you have won't cover all the probable expenses, then ask whether your city or county or some other unit of government will appropriate tax or bond funds annually to support your museum.

If neither endowment funds nor public money will be available or adequate in amount, then regular, annual fund raising of some kind will be necessary. What prospects do you have for that? Can you recruit prominent individuals in your community to serve on your museum's board of trustees--people who are willing to contribute funds themselves every year and also persuade others to contribute? Or can you cover your budget from the proceeds of some special, annual fund-rasing event? In analyzing those options, take a close look at other nonprofit cultural organizations in your community. How many already support themselves through private fund raising? How well are they doing? If organizations already established are struggling to raise money, filling the community calendar with fund-raising events, or competing for the allegiance of wealthy individuals, how much chance do you have at a piece of the available pie?

Moreover, even if other cultural organizations are succeeding, what special fund-raising events might be available to you that they aren't already using--what kind of special fund-raising device is left that you can use for the museum?

Part of your analysis should include actually testing the waters. That is, once you have identified a clear public-benefit mission for your museum, you can then try visiting the kinds of people whose support you will need--business leaders, local philanthropists, elected officials, officers of civic clubs, influential newspaper publishers or broadcast executives, and other prominent citizens--to see if they share you enthusiasm and encourage you to seek community support. Additionally, you could even call a countywide or city hall public meeting, asking anyone interested in art, science, history, or whatever your museum will promote, to attend to hear about your plans and discuss the pros and cons of your project. If you get the word out well in advance and make the meeting sound interesting, the size of the turnout may itself tell you much about the prospects for your museum

Among other things, the turnout may help you analyze your chances for supporting the museum through *admission charges* and *membership dues*. Many museums charge entrance fees and attract membership contributions by offering special programs, free passes, or discounts on museum store purchases to members.

Analyze additionally the potential for contributions of value to the museum besides cash. Will local lawyers and accountants act as Friends of the Museum and handle the legal and financial needs of the museum without charge/ Will lumber yards and hardware dealers donate exhibit-construction material? Will the city or county help at least in providing custodial and security services? Will landscaping firms or garden clubs take care of the museum's grounds? And most important of all, will you be able to recruit an abundance or regular and capable volunteers? Almost no museum operates entirely with paid staff. Almost every museum enlists volunteers to guide visitors, assist with publicity and fund raising, help with research and collections inventories, or whatever else is needed.

SOURCES OF FINANCIAL SUPPORT

UTAH OFFICE OF MUSEUM SERVICES

The Utah Office of Museum Services (OMS) was created in 1993 and is within the Division of Arts and Museums. Its mission is to provide museums with technical assistance, professional training, and funding through a state Museum Grants Program. Please see Grants for a detailed description.

Office of Museum Services
300 Rio Grande Street
Salt Lake City, UT 84101
(801) 533-3589/3592

UTAH ARTS COUNCIL (UAC)

The Utah Arts Council is the nation's oldest state arts agency, created by the Third Utah Legislature in 1899. The Arts Council receives its funding from the Utah State Legislature and the National Endowment for the Arts. Programs include: Arts in Education, Artists' Services, Community State Partnership/Performing Arts tour, Design Arts, Folk Arts, Grants, Literary, and Visual Arts.

Grants are available to legally incorporated nonprofit organizations on a one-to-one match basis. Grant requests are reviewed by panel, committee, and UAC Board of Directors. Approval is based on the merit of the organization and its proposed projects, as well as the monies available.

Utah Arts Council
617 East South Temple
Salt Lake City, UT 84102
(801) 236-7547

UTAH HERITAGE FOUNDATION (UHF)

The Utah Heritage Foundation Low-interest Revolving Fund Loan Program consists of four separate loan programs:

PAST Program: A Salt Lake City-wide revolving fund for the restoration/ rehabilitation of historic residential buildings. TERMS OF LOANS: Interest rate is fixed at 1/2 of prime. Loans are amortized over 20 years with a five year balloon.

UHF/CDBG Program: A Salt Lake City-wide revolving fund for the restoration/rehabilitation of historic buildings, primarily residential, that are located within CDBG eligible areas of Salt lake City. These funds are used for the elimination of slum and blight conditions, as well as to rehabilitate vacant and underutilized homes. TERMS OF LOANS: Interest rate is fixed at 1/2 of prime. Loans are amortized over 20 years with a five year balloon.

UHF/Statewide Program: A revolving fund for the restoration/rehabilitation of historic buildings, primarily residential, that are located throughout the state of Utah. TERMS OF LOANS: Interest rate is fixed at 1/2 of prime. Loans are amortized over 20 years with a five year balloon.

UHF/Bank Partnership Program: A revolving fund for the restoration/rehabilitation of historic buildings located within the service markets of the program's participating banks (Key Bank of Utah and Bank One). Under this program, the banks service construction loans at a 9% fixed interest rate. The Utah Heritage Foundation buys down the interest to a 7% blended rate. TERMS OF LOANS: Interest rate is a 7% blended rate. First year rate is 5%, second year rate is 6%, third year rate is 7%, fourth year rate is 8%, fifth year rate is 9%. Loans are amortized over 20 years with a five year balloon.

Utah Heritage Foundation
Memorial Grove Park
PO Box 28
Salt Lake City, UT 84110-0028
(801) 533-0858, fax (801) 575-1245

UTAH HUMANITIES COUNCIL (UHC)

The Utah Humanities Council, established in 1974, increases public appreciation of the humanities and promotes understanding of human traditions, values, and issues through informed discussion. UHC accomplishes these goals in two ways, by initiating its own projects, and by helping launch the projects of others through a variety of services.

UHC awards grants to non-profit organizations, offers a Speakers Bureau, provides media discussion programs, and collaborates with other Utah cultural and educational groups.

The UHC is not a state agency but is supported by an annual grant from the National Endowment for the Humanities and by contributions from individuals, corporations, and foundations. A volunteer Board of Directors makes policy, evaluates programs, and judges grant proposals.

UHC provides grants to non-profit organizations to help support their work in bringing important humanities projects to the public. Organization grants include: Executive Director, Mini and Major Grants, Media Production, and Teacher Institute. Several grant opportunities are also available to individuals: Research Fellowship Grants, Teacher Incentive Program Grants, and Speakers Bureau Membership Competition.

UHC provides a Speakers Bureau of humanities scholars who are available, free of charge, to present lectures, demonstrations, and multi-media forums to non-profit organizations, study groups, book clubs, and community service committees. Media discussion programs are also free of charge to sponsors and include films, videotapes, audiotapes, exhibits, and books along with a speaker to lead a discussion.

Utah Humanities Council
350 South 400 East, Suite 110
Salt Lake City, UT 84111-2946
(801) 359-9670

UTAH STATE DIVISION OF HISTORY

Historic Preservation Grants

The Utah State Historic Preservation offers Historic Preservation Grants to assist with preparation of nominations to the National Register of Historic Places. Eligible projects include surveys of archaeological and historic resources; development of historic non-text documents as outlined in Utah's comprehensive planning program; development of public education or technical assistance programs for use on a statewide basis; development of restoration analyses, plans and specifications; and local preservation programs. Under the Certified Local Governments Program, when funding is available, grants are awarded for restoration of National Register listed properties.

Utah State History
300 Rio Grande
Salt Lake City, UT 84101
(801) 533-3503

AMERICAN ASSOCIATION OF MUSEUMS (AAM)/ INSTITUTE OF MUSEUM SERVICES (IMLS)

Museum Assessment Program

Map grants are one-time awards to provide museums an independent professional assessment of their complete programs and operation. The **MAP** grant enables an expert to perform an on-site review of the museum and to advise on long-range planning and other matters of concern to the museum.

MAP II is a program designed to serve as a follow-up to MAP. MAP II grants are also a one-time, non-competitive award. These grants will enable participating institutions to receive technical assistance on the care and maintenance of museum collections. Through an on-site evaluation by a museum professional, MAP II assists museums in assessing their needs and developing priorities for collections management and conservation.

MAP III, Public Dimension Assessment, provides the structure for a museum to identify and examine how well it is meeting the needs of its audiences and to improve the quality and variety of its public activities.

MAP Coordinator
American Association of Museums
1225 Eye Street, N.W., Suite 200
Washington, DC 20005
(202) 289-1818

INSTITUTE OF MUSEUM AND LIBRARY SERVICES (IMLS)

The Institute of Museum Services, an independent federal agency within the Executive Branch, was established by Act of Congress in 1976 to encourage and assist museums in modernizing their methods and facilities so that they may be better able to conserve the nation's cultural, historic and scientific heritage; and to ease the financial burden borne by museums as a result of their increasing use by the public.

The Institute of Museum Services is the only Federal agency which provides general operating support (GOS) for museums of all disciplines. GOS funds can be applied to the entire range of museum activities--exhibits, conservation, education, administration, security, maintenance, etc. These grants may also be concurrently applied in several areas of the museum's ongoing operational expenses such as accounting and auditing services, communications, legal expenses, salaries and wages, supplies and materials, transportation and delivery costs, insurance payments, normal repair bills, utilities, and the rental of land and buildings.

In 1997 the Institute of Museum Services was combined with Libraries to become the Institute of Museum and Library Services.

Institute of Museum and Library Services
1100 Pennsylvania Avenue, N.W.
Washington, DC 20506
(202) 786-0539

NATIONAL ENDOWMENT FOR THE ARTS (NEA)

The National Endowment for the Arts is an independent Federal agency created by Congress in 1965 to encourage and support arts and artists. Its mission is to foster the excellence, diversity and vitality of the arts in the United States and to help broaden their availability and appreciation.

The programs of the NEA include: Artists in Education; Challenge and Advancement Grants; Dance; Design Arts; Expansion Arts; Folk Arts; Inter-Arts; Literature; Test Program Support for Local Arts Agencies; Media Arts (Film/Radio/Television); Museums; Music; Opera-Musical Theater; State Programs; Theater; and Visual Arts.

The Museum Program funds projects of artistic significance in the museum field. All types of museums are eligible. Grants are offered in the areas of Special Exhibitions, Museum Collections and resources and Professional Development.

National Endowment for the Arts
Nancy Hanks Center
1100 Pennsylvania Avenue, N.W.
Washington, DC 20506
(202) 682-5400.

NATIONAL ENDOWMENT FOR THE HUMANITIES (NEH)

The National Endowment for the Humanities was created by Congress in 1965 as an independent grant-making agency to support scholarship, research, education and public programs in the humanities. Grants are made through five divisions--Education Programs, Fellowships and Seminars, General Programs, Research Programs and State Programs--and two offices, the Office of Challenge Grants and the Office of Preservation.

Within General Programs grants are awarded for Humanities Projects in Museums and Historical Organizations. These grants support travelling and permanent exhibitions, exhibitions based on the sharing of collections, and the creation of exhibition catalogues and guides to permanent collections. Awards are also made for institutional self-study, for programs that improve a staff's ability to interpret collections for visitors, and for the documentation and conservation of collections that will serve as the basis for interpretative exhibitions and programs in the humanities for the general public.

National Endowment for the Humanities
1100 Pennsylvania Avenue, N.W.
Washington, DC 20506
(202) 357-2257

NATIONAL TRUST FOR HISTORIC PRESERVATION

The National Trust for Historic Preservation was chartered in 1949 by Congress to hold historically significant property and to help Americans preserve buildings, sites, and objects important in history and culture.

The National Trust serves private preservation organizations, individuals, and governmental units at all levels through timely information, technical assistance, advice and, when the need is critical, grants and loans. It collects informatin on successful preservation projects, helps solve specific probems, provides guidance to those developing preservation programs, and initiates special projects that not only result in the preservation of trarget areas, but also yield techniques that can be used elsewhere.

Small matching grants help member organizations hire expert consultants to determine reuse plans for old buildings, fight legal battles, develop energy conservation plans for historic structures, upgrade historic districts and advise on numerous other problems. Other grants are awarded to increase preservation programs in public schools, colleges and universities, and to co-sponsor significant conferences with member organizations. Loans at low interest reates and favorable payback periods help buy, rehabilitate, and sell residnetial and commercial property in historic neighborhoods.

National Trust for Historic Preservation
1785 Massachusetts Avenue, N.W.
Washington DC 20036
(202) 673-4000

NATIONAL SCIENCE FOUNDATION (NSF)

The National Science Foundation is an independent agency of the Federal government established in 1950 to promote and advance scientific progress in the United States. The Foundation does this primarily by sponsoring scientific and engineering research and by supporting selected activities in science and engineering education.

The Foundation considers proposals for support of research in any field of science, including: astronomy; atmospheric sciences; biological and behavioral sciences; chemistry; computer sciences; earth sciences; engineering; information science; materials research; mathematical sciences; oceanography; physics; and social sciences. Interdisciplinary proposals also are eligible for consideration.

Forms and Publications
National Science Foundation
1800 "G" Street, N.W.
Washington, DC 20550
(202) 357-7861.

PRIVATE SECTOR FUNDING SOURCES

Foundations and corporations offer alternative sources of funding for museums. There are a number of publications that can provide direction to the prospective applicant. Some publications offer useful hints for defining funding needs and developing funding strategies. Others provide extensive listings of corporations and foundations, along with financial profiles, contacts, types of funding, size of grants, etc. Examples of these kinds of resources include: *Fund Raising for Museums: The Essential Book for Staff and Trustees*, by Hedy A. Hartman (The Hartman Planning and Development Group, Ltd., Bellevue, Washington); *The Foundation Directory*, edited by Loren Renz (The Foundation Center, New York); *Annual Register of Grant Support: A Directory of Funding Sources* (National Register Publishing Col., Inc., Wilmette, Illinois); *Guide to Corporate Giving 3*, edited by Robert A. Porter (American Council for the Arts, New York, New York); and, *Corporate Foundation Profiles* (The Foundation Center, New York).

Questions to evaluate MEMBERSHIP AND COMMUNITY SUPPORT

1. Does the museum receive financial support from the local community? Is this support consistent? How does the museum solicit this support?

2. Is community support reflected in the membership of a support/membership organization?

3. Does the membership organization have specific, stated purposes for its existence and does it raise funds for the museum?

BASIC INFORMATION ABOUT PRESS KITS

Press kits are designed to give detailed information about an event, issue, a person (like a political candidate), etc. Usually, press kits are issued to members of the media; however, kits may also be given to anyone you are trying to communicate with or influence.

Variety in press kits are endless. Press kits can be packaged and assembled in a number of ways. It is essential, however, for press kits to meet the self-interests of the audience that is being targeted. Since press kits are often used for members of the media, it is important to note the media's self-interest.

MEDIA'S SELF-INTEREST

1. They want newsworthy information, **not** advertisements disguised as editorial.
2. They want people to remember their deadlines. The media lives from deadline to deadline, and any effort to help reporters meet their responsibilities is greatly appreciated.
3. Information must be timely. An event that will take place in December isn't likely to receive a lot of coverage in May. Likewise, news that has come and gone won't receive a lot of press either.
4. Members of the press like thorough background information, and the names and numbers of people they can contact for more information. Nothing is more irritating than receiving a press kit that doesn't have enough information and no contact names and numbers to turn to for answers.

The more you try to meet the media's self-interests and needs, the greater your chances for press coverage. Other things to remember about press kits are:

PACKAGING

Packaging is not the most important aspect of a press it, but nonetheless, it is a vital point to remember. The packaging is the first thing the recipient sees; therefore, it must be neat and attractive. Paper clipping or stapling packets to be used as press kits is unacceptable.

The most basic packaging is a simple folder. The name of your organization must be on the front. By placing your name on the press kit cover, you help the recipient to stay organized, and reporters are more likely to look through the kit if they immediately know who it is from.

Press kits can also come in very elaborate packages. For example, local blood banks have packaged their materials in mock blood bags. Creativity is good, but make sure your organization's desired image is reflected in its press kit covers.

INSIDE ARTICLES

Just like there is infinite variety in press kit packaging, there is also a wide range of possibilities of what can be placed inside. Because of this wide range, there is lots of room for mistakes. The foremost thing to remember is NO "FLUFF" NEWS! Each item must be carefully considered before being placed inside a press kit. If an item does not contribute to the understanding of something specific, it does **not** belong in a press kit.

Here is a list of some common items found inside press kits:

1. **News Releases**: These **must** be typed on your organization's letter head, and they **must** include the name and the phone number of the contact person. Include the date and a headline. News releases must also be written in inverted pyramid form with the most important information located at the top of the story. Include the who, what, when, where, why and how in the first two or three paragraphs of the release.

2. **Photographs**: Usually, four black and white glossies are sufficient (color slides may be substituted). Cut lines containing information about the photographs are always taped on the backs or the bottom edges of the photos.

3. **Previously Published Articles**: These help give additional insight into your organization or issue. Select these with care--make sure the articles are relevant.

4. **Promotional Items**: These include brochures, in-house publications, etc. Again, make sure these items are relevant for the purposes of the press kit.

5. **Backgrounders**: These are documents that help give a more detailed history of your event or issue. Like new releases, these **must** include contact names and telephone numbers.

6. **Fact Sheets**: These give quick, hard facts at a glance. Reporters often find this item useful because fact sheets are to-the-point and easy to read.

7. **Biographies**: These are placed in press kits only when appropriate. They can be helpful when the press kit is designed to bring publicity to a person or an event.

DELIVERY

Press kits are most effective when hand-delivered to a specific person or editor. Press kits can also be distributed during press conferences and special events. Additionally, it is appropriate to mail press kits, but make sure you address them to a specific person. Make sure you spell the name of the person correctly. Also, make sure that you know the gender of the person you are addressing. There are women in this world named Doug, and there are men named Kelly. There is nothing more offensive to a member of the press than to receive a press kit or news release with their name misspelled or their gender misidentified.

ADDITIONAL TIPS

1. PROOFREAD CAREFULLY!!! News releases and other materials that have errors get hung on the bulletin board in the news room to be laughed at--they are rarely published. Also, errors undermine your organization's credibility.

2. In order to increase the chances of media coverage, write your materials using Associated Press (AP) style. This is the style that the media uses most often. AP style books are available at most bookstores.

3. Press kits can be given to the broadcast media as well as the print media; however, be aware that the broadcast media has special needs. File footage and video news releases for television may need to be sent in addition to your press kit, and the radio may require audio tapes containing sound bites. Check with the broadcast media for their requirements and preferences.

Questions to evaluate PUBLIC RELATIONS

1. Does a good relationship exist between the museum and local newspapers, radio and television stations?
2. Are press releases forwarded to local media for dissemination of information? _______________
3. Has the museum taken advantage of free public service time on radio and television? _______________
4. Does the museum produce and disseminate information on its services? Does the museum have a standard information brochure?

CONCLUSION

"How will you keep your museum alive, dynamic, creative, and visionary?"

There used to be a colorful advertisement for museums--a big poster--in the London underground, with this message on it: "Local museums are treasure houses where unlikely objects--curious, ingenious, comic, even beautiful--lie stranded for our gaze. They indicate local pride and a sense of identity. More vividly evocative of the everyday past than our grander institutions, they deserve and reward our notice."

Stranded is hardly the right word, particularly if you put into a museum all the care that has been suggested in the preceding sections; but how true the rest of the poster's description can be. And how useful to remember, after so many technical considerations, that the intent of it all is truly to produce a treasure house. Caring for the things people treasure and explaining why people treasure them is the essential mission of museums, whether it is pursued through scientific description, intellectual education, or aesthetic appreciation. Remember also that it isn't always necessary to know why an ancient spearpoint, a face in an old photograph, the bones of some extinct animal, or a particular painting so captures the imagination and remains meaningful in people's lives long after they visit a museum. Know only that all the effort it takes to make a good museum is worthwhile if and when a museum experience gives someone pleasure, arouses emotions, or stimulates thought.

APPENDICES

RESOURCE ORGANIZATIONS

I. National Organizations

African-American Museums Association
420 Seventh Street NW
Washington DC 20004

American Arts Alliance
424 C Street NE
Washington DC 20002

American Association for State
& Local History
172 Second Avenue North Suite 202
Nashville Tennessee 37201

American Association of Botanical Gardens
& Arboreta
PO Box 205
Swarthmore Pennsylvania 19081

American Association of Museums (AAM)
1225 Eye Street NW Suite 200
Washington DC 20005

American Association of Youth Museums
Lutz Children's Museum
247 South Main Street
Manchester Connecticut 06040

American Association of Zoological Parks
& Aquariums
Oglebay Park
Wheeling West Virginia   26003

American Institute for Conservation
of Historical and Artistic Works (AIC)
3545 Williamsburg Lane NW
Washington DC 20008

Art Museum Association
270 Sutter Street
San Francisco California 94108

Association for Living Historical Farms
and Agricultural Museums
National Museum of American History
Washington DC 20560

Association of Art Museum Directors
1130 Sherbrook Street West
Montreal Quebec H3A 2R5 CANADA

Association of Railroad Museums Inc
33 Ashland Street
Manchester New Hampshire 03104

Association of Science Museum Directors
Field Museum of Natural History
Roosevelt Road and Lake Shore Drive
Chicago Illinois 60605

Association of Science-Technology Centers
1413 K Street NW
Washington DC 20005

Association of Systematics Collections
Museum of Natural History
University of Kansas
Lawrence Kansas 66045

Association of Volunteer Committees
of Museums of CANADA and the United States
PO Box 774 Station B
Ottawa Ontario K1P 5A0 CANADA

Canadian Museums Association
280 rue Metcalfe Street Suite 202

Ottawa Ontario K2P 1R7 CANADA
Council of American Maritime Museums
Maritime Museum
Po Box 636
St Michaels Maryland 21663

Council for Museum Anthropology
Lowie Museum of Anthropology
University of California
Berkeley California 94720

Institute of Museum Services (IMS)
1100 Pennsylvania Avenue NW Room 609
Washington DC 20506

Museum Reference Center
A & I Building Room 2235
Smithsonian Institution
Washington DC 20560

Museum Store Association
61 S Pine Street
Doylestown Pennsylvania 18901

National Endowment for the Arts (NEA)
1100 Pennsylvania Ave. NW
Washington DC 20506

National Endowment for the Humanities (NEH)
1100 Pennsylvania ve. NW
Washington DC 20506

National Institute for the Conservation
of Cultural Property
A & I Building Room 2225
Smithsonian Institution
Washington DC 20560

National Trust for Historic Preservation
1785 Massachusetts Avenue NW
Washington DC 20036

North American Indian Museums Association
Seneca-Iroquois National Museum
PO Box 442
Salamanca New York 14779

Smithsonian Institution
Traveling Exhibition Service (SITES)
Washington DC 20560

Society of American Archaeology
5545 NE Skidmore
Portland Oregon 97218

Society of Architectural Historians
1700 Walnut Street Suite 716
Philadelphia Pennsylvania 19103

U.S. Association of Museum Volunteers
1307 New Hampshire Avenue NW
Washington DC 20036

II. U.S. Regional Museum Organizations

Mid-Atlantic Association of Museums
PO Box 817
Newark Delaware 19715-0817

Mid-West Museums Conference
Jefferson National Expansion Memorial
11 North 4th Street
St Louis Missouri 63102

Mountain Plains Museum Association
Old Cowtown Museum
1871 Sim Park Drive
Wichita Kansas 67203

New England Museums Association
% Charlestown Navy Yard
Boston National Historical Park
Boston Massachusetts 02129

Southeastern Museums Conference
PO Box 3494
502 North Boulevard
Baton Rouge Louisiana 70821

Western Museums Association
700 State Drive Roon 130
Los Angeles California 90037

III. Regional Conservation Centers in the United States

Balboa Art Conservation Center
PO Box 3755
San Diego California 92103

Center for Conservation and Technical Studies
Fogg Art Museum
32 Quincy Street
Cambridge Massachusetts 02138

Conservation Center for Art and Historic Artifacts
264 South 23rd Street
Philadelphia Pennsylvania 19103

Intermuseum Conservation Association
Allen Art Building
Oberlin Ohio 44074

New York State Office of Parks, Recreation,
and Historic Preservation
Collections Care Center
Peebles Island
Waterford New York 12188

Northeast Document Conservation Center
100 Brickstone Square
Andover Massachusetts 01810-1428

Texas Conservation Center
Panhandle-Plains Historical Museum
Box 967 WT Station
Canyon Texas 79016

Textile Conservation Center
800 Massachusetts Avenue
North Andover Massachusetts 01845

Pacific Regional Conservation Center
Bishop Museum
PO Box 19000-A
Honolulu Hawaii 96817

Rocky Mountain Regional Conservation Center
2420 South University Boulevard
Denver Colorado 80208

Upper Mid-West Conservation Association
2400 Third Avenue South
Minneapolis Minnesota 55404

Williamstown Regional Art Conservation
Laboratory Inc
225 South Street
Williamstown Massachusetts 01267

IV. Local Agencies and Organizations

Utah Arts Council
617 East South Temple
Salt Lake City UT 84102-1177

Utah Cultural Alliance
PO Box 521613
Salt Lake City UT 84152-1613

Utah Division of Parks and Recreation
1636 West North Temple
Salt Lake City UT 84116

Utah Heritage Foundation
355 Quince Street
Salt Lake City UT 84103

Utah Humanities Council
202 West 300 North
SLC UT 84103

Utah Museums Association
PO Box 2077
Salt Lake City UT 84110

Utah Office of Museum Services
300 Rio Grande
Salt Lake City, UT 84101

Utah Preservation Consortium
Marriott Library
University of Utah
Salt Lake City UT 84112

Utah State Archive & Records Service
State Capitol-- Archives Building
Salt Lake City Ut 84114

Utah State Historical Society
300 Rio Grande
Salt Lake City UT 84101

Utah Statehood Centennial Commission
324 South State Suite 234
Salt Lake City Ut 84111

Utah Travel Council
Council Hall/Capitol Hill
Salt Lake City Ut 84114

Resources Regarding Americans with Disabilities Act:

U.S. Department of Justice
Civil Rights Division
Office of the Americans with Disabilities Act
PO Box 66118
Washington, DC 20035-6118
(202) 514-0301 (voice)
(202) 514-0383 (TDD)
(202) 514-6193 (electronic bulletin board)

Paralyzed Veterans of America
Department of Architecture and
Barrier-free Design
801 18th Street, NW
Washington, DC 20006
(202) 872-1300

State Historic Preservation Office
300 Rio Grande Street
Salt Lake City, UT 84101
(801) 533-3500

Clearinghouse on Disability Information
U.S. Department of Education
Office of Special Education and
Rehabilitation Services
Switzer Building, Room 3132
Washington, DC 20202

National Park Service
Preservation Assistance Division
P.O. Box 37127
Washington, DC 20013
(202) 343-9578

UTAH RESOURCE LIST
ADA Information & Referral: Access Utah Network
1-800-333-8824

Public TDD Relay Service: Utah Relay System
298-9484, 1-800-364-4128

ADA Technical Assistance: Regional ADA Info Center, CO

ADA Implementation Committee: Utah Governor's Council for People with Disabilities
350 E. 500 S. #201, SLC 84111
801-533-4128 (v/tdd)

TITLE I - EMPLOYMENT

Utah Governor's Committee on Employment of People with Disabilities
120 N. 200 W. #201, SLC 84103
538-4210 voice, 538-4192 TDD
Sherry Repscher, Director
Employer training & tech. asst., disability sensitivity programs, information and referral

Projects with Industry--Easter Seals of Utah
254 W. 400 S. #340, SLC 84101
531-0522 voice or TDD
Steve McVey, Program Coordinator
Employer training, job placement, tech. asst.
District offices located at Job Service Offices:
Training & tech. asst., job placement programs
So. County, 5735 So. Redwood Road
2669-4810 Page Petrucka
S.L. Metro, 720 S. 200 E.
536-7127 Lance Wallace
Provo, 1550 N. 200 W.
377-7882 Royal Tippetts
Logan, 446 N. 100 W. Box 307
752-5381 Thomas Jackson
Ogden, 480 27th St.
399-2192/2194 Joe Pistoia/Bill Vicars
Clearfield, 1579 S. State Street
773-83866 Bill Vicars
Moab, 91 E. Uranium Avenue
259-7124 Spencer Snow
Price, 685 E. 200 S.
637-3031 Dorothy Burt Mathis

Division of Services for the Visually Handicapped
309 E. 100 S. SLC 84111
533-9393 Bill Massey
Vocational rehabilitation services

Job Service--Utah Department of Employment Security
140 E. 300 S. SLC 84111
536-7451 Robert Brown, Program Specialist
Disability specialists available to work directly with employers and individuals with disabilities, call local Job Service Office (see local listings for Projects with Industry in previous column)

Utah State Office of Rehabilitation
Independent Living Services
538-7530 Duane Betourney, Program Director
250 E. 500 S. SLC 84111
533-6999, Wendy Pickard, Employer ADA trainer
660 S. 200 E. #400 SLC 84111

Division of Rehabilitation District Offices
Client support, rehab/career counselling, asst. technology, supported employment
Northern, 150 N. Washington blvd.
Ogden, 621-4672, Norm Penrod
Ogden, 856 24th Street
399-9231, Diane Russell
Downtown SLC, 180 S. 300 W #100
533-5165, Kevin Duffy
Central SLC, 638 Wilmington Avenue
533-5975, William Green
South SLC, 5138 S. State Street
533-5291, Blaine Simons
Provo, 150 E. Center Street
374-7724, Jack White
Eastern, 662 W. Price River
Price, 637-7734, Karl Kraync
Southern, 411 South Main Street
Cedar City, 586-9995, Jim Hilton

TITLE II - STATE & LOCAL GOVERNMENT

Governor's Office of Planning & Budget
116 State Capitol, SLC 84114
538-3764, fax 538-1547
Nancy Plant, ADA Coordinator
State government training, facility & programs review, complaint resolution, tech. asst.

Utah Governor's Council for People with Disabilities
350 E. 500 S. #201, SLC 84111
533-4128, Tamara Wharton, ADA Ombudsman
Training, tech. assistance, ADA library, complaint resolution, ADA "Train-the-Trainer"

TITLE III - PUBLIC ACCOMMODATIONS

Independent Living Centers
Four regionally local offices provide technical support to communities and individuals with disabilities through assisted technology, trans. services, client support, and facility reviews.

Local ILC offices covering the state:
Wasatch Front
Utah Independent Living Center
3445 S. Main St., SLC 84115-4453
466-5565, 466-9910 tdd, Deb Mair, Director
Northern Utah
OPTIONS for Independence
1095 N. Main St., Logan 84321
753-5353, Helen Roth, Director
Eastern Utah
Active Re-Entry
Box 931, 451 S. Carbon Av., Price 84501
637-4950, Terri Gibbs, Asst. Tech.
Southern Utah
So. UT Independent Living Center
206 N. 1000 E., St. George 84770
673-7501, Lori Cottam, Director

ASSIST - Architectural Consultants
218 E. 500 S. SLC 84111
355-7085
Advice to public facilities

TITLE IV - TELECOMMUNICATIONS

Public Service Commission
Box 45585, SLC 84145
530-6781, Joe Dunlop, Telecom. Analyst
ADA telecommunication issues and referral, TDD purchase for state/local government

Division of Services for Deaf and Hard of Hearing
Utah Community Center for the Deaf
5709 South 1500 West, SLC 84123
262-3931, fax 262-4123, Gene Stewart, Administrator
Asst. tech., devices and information
533-5997, Mitch Jensen, Interp. Services

Utah State Relay System
388 N. 400 E., Bountiful 84010
295-8245, Madeline Parkins
Training, public access services to TDD

TITLE V - MISCELLANEOUS PROVISIONS

ACCESS UTAH NETWORK--Utah Assistive Technology Program--Center for Persons with Disabilities, Utah State University
Logan 84233-6855, 750-2073
1-800-333-8824 toll-free
Troy Justesen and Brian Patchett
ADA Information and referral, assistive technology, accommodations, complaints

Legislative Coalition for People with Disabilities
254 W. 400 S. #340, SLC 84101
531-0522 Linda Smith, Director
Disability law updates, monthly meetings, legislative monitoring and advocacy

Utah State Parks and Recreation
1636 W. N. Temple, SLC 84116-3156
538-7221
Listing of accessible facilities