

**APPROVED MINUTES**  
**James Monroe Museum and Memorial Library Board of Regents**  
**October 19, 2016, 10:00 AM**  
**Jepson Executive Alumni Center**  
**University of Mary Washington**

**Regents Present:** G. Scott Walker, Chairman; Peter Broadbent, Vice Chairman; G. William Thomas, Jr., Art Buswell; Troy Paino; Fred Rankin; James Lucier; Mary Lucier; Helen Marie Taylor; Mary Randolph Corbin; Kerry Johnson; Patrick McSweeney; Rita Thompson, Justin Logsdon.

**Regents Absent:** Barbara Micou; Porter Blakemore; Charles McDaniel; Erma Baker.

**Others Present:** Scott Harris; Lynda Allen, Joe Shubert, Mary Anna Broadbent, Jarod Kearney.

**Welcome and Call to Order**

**G. Scott Walker, Chairman**

Chairman Walker called the meeting to order at 10:09 AM.

**Introduction of New UMW Officials:**

Mr. Fred Rankin, Rector University of Mary Washington Board of Visitors

Dr. Troy Paino, President University of Mary Washington

Mr. Walker introduced Dr. Paino and Mr. Rankin. They each took a moment to share some information about themselves. Dr. Paino and his family are new to the area. He was previously the President of Truman State University. Dr. Paino discussed briefly some of the changes Truman State went through while he was President. Mr. Rankin is new to the position of Rector, but he is not new to Fredericksburg, where he has lived for 24 years. He recently retired as the CEO of Mary Washington Healthcare.

**Approval of Minutes, Meeting of April 13, 2016**

**Mr. Walker**

There was a brief discussion of the minutes, during which Mrs. Corbin commended the thoroughness of the minutes.

With no changes proposed, the minutes stand approved as presented.

**Museum Director's Report Summary**

**Scott H. Harris, Director**

Mr. Harris summarized his report, which is attached to these minutes.

Mr. Harris provided an update on museum activities. The Museum is exploring offering programming on every First Friday. The events will make use of the newly renovated interior space of the museum. The offerings will expand beyond trivia nights and will include a variety of activities, such as author talks and movie nights.

The 27<sup>th</sup> Annual Welsh Festival on September 17 was a success. The Welsh Society and the Museum were both very pleased with the outcome. Trolley usage was high, bringing a large number of Family Weekend visitors from the UMW campus to downtown. The festival is now one of the oldest cultural festivals in Fredericksburg, and one of the only Welsh Festivals in the country.

The 29<sup>th</sup> Annual James Monroe Lecture will be on November 10 at 7:00 PM, featuring Dr. James Broussard, Professor of History at Lebanon Valley College. He will speak on the evolution of the two-party system in Monroe's era. This and other events will be part of the academic programming related to the bicentennial of Monroe's election and presidency. The lecture is supported in part by the James Monroe Memorial Foundation, the UMW Department of History, and the Friends of the James Monroe Museum.

Mr. Harris provided an update on the exhibits and exhibit spaces at the Museum. A great deal of redesign and construction work was done over the course of a few months to make better use of the museum space. Due to the National Historic Landmark status of the building, there were limits on the structural changes that could be made. The functions of the *Making of a Revolutionary* gallery and the orientation gallery were switched. The switch required a new framing system to be created for the *Making of a Revolutionary* panels. The repurposing of the rooms opened up the larger room, revealing a considerable portion of the book collection, and creating a multifunctional space for indoor programming in the new orientation gallery. The orientation space also includes the gallery space used for changing exhibits. The Museum's current Bowley Scholars, Jackie Downes and Kelly Haynes, assisted with the design and preparations for the gallery renovations.

During the renovations the Museum was closed for only two days, and offered free or discounted admission on days when the work caused disruption to the visitor experience. The staff is very pleased with the end result of the gallery changes.

Only two of the original panels in the *Making of a Revolutionary* gallery could not be fit into the slightly smaller room. The content of those two panels is now being addressed using the short video presentation, *Monroe at War*. The two panels that were removed are being kept in storage.

Finally, one of the goals driving the renovations was to allow for a more active changing exhibit schedule. Museum staff will now be able to mount more diverse exhibits, as well as have the opportunity to exhibit more artifacts from the existing collection, or on loan from other sites.

The original hardwood flooring remains intact underneath the new laminate flooring, so that if desired, it can be restored at a later date.

There was a brief discussion of James Monroe's original book collection, and the other books in the Museum's collection. Mr. Harris stated that the Museum owns about 40 of James Monroe's books featuring his personal bookplate. The remainder of the books in the Museum's collection are those that Laurence Gouverneur Hoes collected which he thought to be representative of

books from Monroe's era. The Museum's book collection consists of between 1300 and 1400 titles, which would have been about the size of Monroe's original library.

Mr. Harris shared details of the current political memorabilia exhibit, *Conduct in the Public Service: Artifacts of Politics and Government from the Collection of the James Monroe Museum*. He described it as an eclectic collection of political memorabilia, which offers insight into our political culture through the years. The items were gathered by Laurence Gouverneur Hoes throughout his lifetime. The artifacts range from Monroe's time all the way up to the Reagan-Bush era.

Mr. Harris offered an update on the Museum's marketing efforts, including how it addressed the Pokemon Go craze that swept through museums across the world over the summer. In the end, Mr. Harris said, the purpose of their strategy was to remind people that they could have a real experience in the museum by looking up from their devices.

Mr. Harris discussed the Museum's revenue figures. The income from membership, rentals, and program fees decreased from the previous year. However, it may prove to have been largely due to errors in data entry related to budget codes. The Museum staff is currently researching the entries to verify the numbers and Mr. Harris will report back on the updated findings.

Lynda Allen was introduced by Mr. Harris as the new fulltime Public Programs Coordinator. Staff is currently working to fill her previous position of Office and Store Manager. With the creation of the new position there has been a reorganization of duties, including moving the responsibility of maintaining the Friends of the James Monroe Museum memberships to the purview of the Office Manager. Mrs. Corbin pointed out that memberships make wonderful gifts for friends and family.

Mr. Thomas inquired about the status of renovation plans for Seacobeck dining hall on campus, specifically the potential for a portion of it to be used by the Museum. Dr. Paino addressed the question, explaining that the renovation plans have not been finalized and that a change in the funding requirements state that it needs to have more of an academic focus in order to be eligible for funding. The plan will be revised pending current discussions. Dr. Paino has received feedback on potential uses for Seacobeck from many campus perspectives. Dean Richard Finkelstein shared that the Commonwealth of Virginia requires a certain percentage of the building to be used for academic space in order to receive funding for renovations. Mr. Thomas stressed that the Regents are in agreement on the importance of a space for a physical presence for the Museum on campus. It would provide an opportunity to have a Monroe scholars program, as well as provide a space for Monroe artifacts to be exhibited on campus.

Mr. Walker discussed the high volume of visitors brought into downtown Fredericksburg by the city-wide First Friday events, indicating that it is an excellent opportunity to attract new visitors who might not normally come to the museum otherwise. Mr. Harris also pointed out the increased number of residents in the nearby neighborhoods due to new construction. The Museum is working toward being positioned to be a community resource for those new residents.

## **Old Business**

### **Progress on Museum Work Plans (FY16 and FY17)**

**Mr. Harris**

Mr. Harris discussed the FY16 revenues of the Museum. Total revenue came to \$55,304. The final number will likely be somewhat higher following a staff review of the FY16 data. The Museum is still working toward a goal of \$75,000 in revenue per year. Visitation was up about 10% from FY15. Income from FY16 is down approximately 25-30% from the previous year. The drop was influenced by fewer rentals, the cancellation of events, and possibly glitches with the sequencing of membership renewals.

Mrs. Taylor inquired about the benefits of membership in the Friends of the James Monroe Museum. Mr. Harris replied that membership benefits include the use of the facility for private events at a discounted rate, discounts in the Museum Store, discounted admission to events, free admission to the museum, and depending on membership level, special guided tours. There followed general discussion of other museums in Fredericksburg that draw from the same visitor base, as well as some discussion of the Fredericksburg Museums Council, of which Mr. Harris is currently the president.

Mr. Harris offered a brief update on the StEPs program, to be elaborated on further later in the meeting. The Museum staff completed the self-study program. One area of focus for the Museum that was highlighted due to the process is outreach and educational programming. The new position of Public Programs Coordinator will allow for more staff focus on both areas. Additionally, the new position allows for more time for the curator to focus on exhibit planning, which will also contribute to more in-depth educational offerings.

The Museum joined the Sites of Conscience organization. It will provide an opportunity to address more challenging issues in the Monroe legacy such as slavery and Indian removal as well as subjects such as civic responsibility. It will also allow for further involvement by other University departments in the Museum's programming. Mrs. Corbin encouraged the staff to consider sharing any materials developed for the Sites of Conscience programming with area high schools for their use in the classroom. Additionally, she suggested that the staff look at the possibility of a feature article in Mary Washington Today focused on the new programming.

Mr. Harris discussed the Museum's invitation to participate in an online presidential exhibit through the Google Cultural Institute. The exhibit will go live in January 2017. He shared that the Google Cultural Institute offers free space for online exhibits, as well as the structure and IT support. Mr. Harris was pleased to share that the Museum's two Bowley Scholars are helping to develop the multimedia exhibit, which will be available to a worldwide audience.

Museum staff continues to work on programming relating to the bicentennial of James Monroe's presidency, including his presidential tours. The new traveling exhibit, "In the Spirit of the People: James Monroe's 1817 Presidential Tour of the Northern States," will travel to some of the same communities that President Monroe traveled to during his northern tour. Some of the potential sites and cities for the exhibit include, the West Point Museum, several places in Philadelphia including Braintree, Monroe County, Michigan, and several sites in New England and Pennsylvania. The current number of sites being approached to display the exhibit is 12-14.

There are two copies of the exhibit that will travel independently so that it can be available to two different sites at the same time. There was general discussion about the books written about the presidential tours, one written in 1817, one after the second round of tours, and the first volume of *The Papers of James Monroe*, edited by Dan Preston. At the time of the tours, it was considered an important event when the president came to your community. Mr. Harris shared that he has contacted FedEx to see if they would be willing to sponsor the shipping costs.

Dean Finkelstein suggested coordinating the traveling exhibit openings with the advancement office, especially for sites like Philadelphia and Boston.

The staff of *The Papers* was partners on the creation of the exhibit. They provided much of the knowledge of the documentation of the tours. Museum Studies students contributed additional research, and created the layout for the panels. They were fabricated here in Fredericksburg by Creative Color. Mr. Harris described the design and how it is structured so that it can be easily broken down and shipped. The exhibit panels were on display on September 24 at the Capital Square Fair in Richmond. The Library of Virginia has already asked to display the exhibit.

Mr. Thomas inquired about a symposium at the White House Historical Association that had mentioned at a previous meeting. Mr. Harris shared that he has been in conversations with the Association about the symposium and that the Museum will be part of it in some capacity. There will be a meeting of Presidential sites in DC next year, which the Museum will be part of. Mr. Harris has also been in touch with William Seale, Editor of the journal *White House History*, as Mr. Harris was asked to submit an article focused on Monroe's relationship with the French for the journal. Additionally, there is a space in Decatur House that Mr. Harris is hoping to use for a small exhibit of artifacts from the Museum. An event with the Arts Club of Washington is also being considered in relation to bicentennial celebrations.

Mr. Harris then addressed the FY17 work plan. The Museum staff has already completed much of the FY17 work plan. Realignment of staff duties has been completed. That realignment will allow for more research time in relation to curatorial duties. The bicentennial planning is well underway. The renovations and switching of the orientation and *Making of a Revolutionary* galleries have been completed. Educational outreach will be more of a focus in FY17.

Colonel Buswell inquired about having the traveling exhibit displayed in the Colonial Beach Town Hall after it's done with its travels, to coincide with the opening of the James Monroe birth house. It would provide an opportunity for publicity for both. Colonel Buswell stated that conservatively the birth house would be opening in two years.

Mr. Thomas requested that future meetings include an update either in person or in writing from Dan Preston on the work of *The Papers of James Monroe*. Mr. Harris agreed and offered an update on their work. Earlier in the year there were negotiations with the University of Virginia to move the Papers to UVA. The discussions revolved around a long term commitment to the completion of the project. The negotiations fell through and for the foreseeable future *The Papers* will remain at UMW. The latest volume of *The Papers*, which begins to focus on Monroe's time as Secretary of State, has recently been sent to press and will be available by next spring.

## **Update on James Monroe Presidential Bicentennial Commemoration**

**Mr. Harris**

This item was previously addressed in the presentations of the Director's Report and the update to the FY 2017 Work Plan.

## **Review of Museum's StEPS Self-Study** (report attached to these minutes) **Mr. Harris**

The American Association for State and Local History (AASLH) developed the Standards and Excellence Program (StEPS) for History Organizations. It is a self-study program to be done at the site's own pace. It is designed for small and mid-size organizations to assess and improve their operations. Mr. Harris was marginally involved in the development of the program. The staff has moved through the substance of the program and has found that the Museum is doing well based on the program standards. Based on the program's method of evaluation, most of the Museum's operating practices are at the level of Better. StEPS helps evaluate the mission statement, stewardship, outreach, as well as other aspects of operations and procedures.

Mrs. Taylor inquired about how other sites, such as Montpelier, might access the program. Mr. Harris offered to contact the staff at Montpelier to offer information about the program.

Two areas for improvement spotlighted during the process were public programming, and visitor surveys. The Museum will be developing a multi-year marketing plan in support of new programming, especially with the approaching bicentennial programs. The Museum will also develop a code of ethics. In terms of items such as mission, vision, and operating policies the Museum scored High and Works Effectively. Going through the process proved to be a good endorsement of current policies and procedures.

There was general discussion of possible methods of obtaining visitor feedback.

Since so much of FY17's work plan has been accomplished already, Mr. Rankin asked what could be added to the work plan for FY17. Mr. Harris responded that the Museum will be further exploring the power of online resources to reach niche audiences and to increase the diversity of the Museum's audience.

There were several questions regarding the Google Cultural Institute. Mr. Harris clarified that there is no fee for participation and that Google offers in-kind contributions in the form of the physical online structure and technical aspects of the site. The Museum's 360° virtual tour will be updated to reflect the new layout of the galleries, which Google will be assisting with.

Ms. Thompson inquired about programming for schools. Mr. Harris indicated that programs for schools, including field trips to the Museum as well as visits to classrooms by staff members, will be included in the planning for educational outreach over the next two years. Field trips are much more difficult for schools to manage now due to budgetary constraints. There are currently lesson plans available through the Museum's website for 4<sup>th</sup>-6<sup>th</sup> grades and 9<sup>th</sup>-12<sup>th</sup> grades. Making classroom presentations available to area schools is an opportunity the staff plans to explore, with the goal of sharing the museum and Monroe's legacy with more students. There has been growth in diversity in tour groups that visit the museum.

There was a brief discussion of groups that have recently visited the museum, including a homeschool group, a group of middle school students from Washington State, a seniors' summer camp, a Minnieland summer camp, docents from the Ronald Reagan Library, and a Road Scholars group. Mr. Walker pointed out that the sizes of groups that can visit the Museum are limited by the available space.

There was discussion of a set of furniture formerly owned by Camilla Hoes Pope which the James Monroe Memorial Foundation was approached about purchasing. Mr. Harris offered to follow up with Bill Beck to get more information regarding the furniture.

### **New Business**

#### **Consideration of Artifact Loan to Herbert Hoover Presidential Library and Museum**

**Jarod Kearney, Curator**

Mr. Kearney displayed for the Regents a snuff box from the Museum's collection. The Herbert Hoover Presidential Library and Museum is planning an exhibit, *C-SPAN's American Presidents: Life Portraits* and requested a personal item from JMM to be included in the exhibit. Mr. Kearney suggested a snuff box with inlaid ivory that belonged to James Monroe. The length of loan will be April–November 2017. It will be a fairly high profile exhibit, so having an artifact from our collection included will provide free publicity and increased public awareness of Monroe and of the Museum.

Mr. Broadbent motioned for approval of the work plan, seconded by Colonel Buswell. The motion passed unanimously.

#### **Election of Chairman and Vice Chairman**

**Mr. Walker**

Mr. Walker asked for nominations for Chair.

Mr. Broadbent nominated Mr. Thomas for Chairman. Mrs. Corbin nominated Mr. Walker for Vice Chairman. Mr. Walker asked for any further nominations from the floor. There being none, the motion to approve the slate of candidates was made by Mrs. Corbin, and seconded by Colonel Buswell. The motion passed unanimously.

### **Adjournment**

With no further business to come before the Board of Regents, Mr. Walker adjourned the meeting at 11:37 AM.



## THE JAMES MONROE MUSEUM

908 Charles Street, Fredericksburg, VA 22401 540-654-1043 [www.jamesmonroemuseum.org](http://www.jamesmonroemuseum.org)  
An historic property administered by the University of Mary Washington

### MEMORANDUM

**TO:** Board of Regents, James Monroe Museum  
**FROM:** Scott Harris, Director, James Monroe Museum *SHH*  
**DATE:** October 19, 2016  
**RE:** Director's Report and Update on FY 16 and FY 17 Museum Work Plans

I am pleased to present the following report on the activities of the James Monroe Museum since the last meeting of the Regents.

#### Public Programs and Outreach

The Museum's annual schedule of public programs faced some unaccustomed challenges over the summer and early fall. First Friday History Trivia, a popular program for the last several years, experienced two cancelations. The first program, in May, contended with heavy rain that kept all but a handful of participants from showing up. The concluding trivia night in October was postponed due to a major power outage in downtown Fredericksburg. The October event is tentatively scheduled for January, 2017 in the Museum's newly renovated multipurpose gallery (described in detail later in this report). Despite these challenges, the trivia nights in between remained a popular feature.



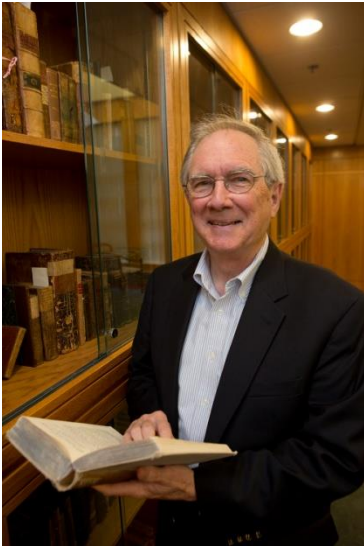




Another perennial favorite, the Fredericksburg Welsh Festival, enjoyed one of its best results ever on September 17. The 27th annual installment of this collaboration with the Welsh Society of Fredericksburg drew some 1,600 attendees who enjoyed music, dancing, children's activities, cultural presentations, and an array of craft vendors. The Museum also repeated its successful "pop-up" display on the UMW campus the same day during Family Weekend.



The next public program on the museum's calendar is the 29th Annual James Monroe Lecture on November 10 at 7:00 PM in the Digital Auditorium of the Hurley Convergence Center on the UMW campus. Dr. James H. Broussard, professor of history at Lebanon Valley College, will discuss the evolution of the two-party system in Monroe's era.





## Exhibits

The Museum has been a bit of a construction zone in recent weeks as the functions of two gallery spaces were switched to make better use of our limited space. Our largest interior room, located in the portion of the museum added in the 1960s, now houses the exhibits used for visitor orientation. This room also remains our changing exhibit area, and can also be utilized for public programs and receptions. New laminate flooring encapsulates the original hardwood floor, permitting a return to that surface if desired in the future. Exhibits covering James Monroe's early life, college years, and experiences during the Revolutionary War were relocated to the former orientation gallery. This space received new carpeting, and the presentation is augmented by a four-minute video program, *James Monroe at War*. A few finishing touches remain to complete our exhibit realignment, but the overall effect already seems to be effective.



Curator Jarod Kearney oversaw the design and installation of the exhibit changes. Rockwood Homes of Fredericksburg was the project general contractor. The museum thanks owner Kevin Meade and craftsmen Dean Barnhart and Geoffrey Bryan for their usual excellent work, as well as subcontractors Flowers Metal Fabricating, Fredericksburg Hardwood Flooring, JS Masonry, and Sherman Williams.



The new gallery arrangement was completed in time to host a special exhibit tied to the current presidential election season, and to the bicentennial of Monroe's election in 1816. *Conduct in the Public Service: Artifacts of Politics and Government from the Collection of the James Monroe Museum* showcases the diverse and eclectic assemblage of political memorabilia collected over many decades by the Museum's founding director, Laurence Gouverneur Hoes. The exhibit, which features not only Monroe-related items but others from elections throughout the 19th and 20th centuries, runs until March 31, 2017.





## Marketing and Media Presence

The Museum continued its usual combination of media releases, paid advertising, and social media marketing over the summer. In the latter area, brief attention was paid to the Pokemon Go craze that swept the world beginning in July. While the fad did not result in significant Museum visitation, it did give us a chance to have some fun and remind the public that looking up from one's cell phone and experiencing real artifacts could also be a useful activity.



## Financial Information

**NOTE: The following figures reflect comparative fiscal year activity through the end of Fiscal Year 2016:**

- Combined revenue from admissions (including “Fredericksburg Timeless” block tickets), store sales, and donations rose from \$26,990 in FY 2015 to \$31,477 in FY 2016, an increase of more than 16%. Museum visitation of 7,875 was up more than 10% from the FY 2015 total of 7,148.
- Year-to-date Friends of the James Monroe Museum income from memberships, program fees, and rentals is \$23,827, which is a decrease of 33% over previous FY.

## **FY 16 Museum Work Plan Update:**

**1. Raise \$75,000 in Museum revenue from admissions, store sales, facility rentals, program fees, and donations during the fiscal year.**

As reported above, total revenue and support for FY 2016 was \$55,304.

**2. Complete institutional review via the American Association for State and Local History StEPS program, examining the following evaluation categories: Mission, Vision, and Governance; Audience; Interpretation; Stewardship of Collections; Stewardship of Historic Structures and Landscapes; Management.**

The review process was completed in August. A separate report is attached.

**3. Continue development and implementation of Museum outreach educational programs for elementary and secondary school groups based on Virginia Standards of Learning (SOLs). Utilize, as appropriate, Museum staff and interns; UMW Department of History faculty; Papers of James Monroe staff; and Fredericksburg Public Schools teachers and curriculum specialists.**

This goal continues to be in process owing to recent reallocation of Museum staff functions.

**4. Explore feasibility of the Museum becoming a member of the International Coalition of Sites of Consciences.**

The Museum formally joined the Coalition in September. Our first initiative within this interpretive framework is expected to be a presentation on the Monroe administration's relations with Native American groups paired with a colloquium on Native American issues today.

**5. Develop and implement work plan for James Monroe Presidential Bicentennial (JMPB), to commence in 2016 with activities aligned to the Presidential election.**

As described above, the Museum's special exhibit of political memorabilia, *Conduct in the Public Service*, is part of the bicentennial initiative. This year's James Monroe Lecture on the two-party system is another element. In addition, the traveling panel exhibit on Monroe's 1817 tour of the northern states, *In the Spirit of the People*, has been fabricated. The exhibit, a joint project with the Papers of James Monroe, was created by UMW museum studies students.

## **FY 17 Museum Work Plan Update:**

**1. Grow Museum revenue from admissions, store sales, facility rentals, program fees, and donations to \$75,000 during the fiscal year. Estimated FY 2016 total revenue is \$65,000.**

In process.

**2. Conduct internal assessment of Museum staff position descriptions and classifications to produce maximum cost-effectiveness.**

The assessment was conducted in the spring and summer of 2016. A new full-time, classified position of Public Programs Coordinator was created, combining most duties of the former part-time Membership and Special Events Coordinator, plus educational programming formerly supervised by the Curator. The Curator will focus greater attention on collections research and a more robust schedule of changing exhibits. Administrative support of the Friends of the James Monroe Museum was assigned to the Office and Store Manager position.

**3. Formally launch James Monroe Presidential Bicentennial commemoration with General Assembly resolution, political memorabilia exhibit (James Monroe Museum), and Northern states tour traveling exhibit (selected venues).**

The first of these activities is in the planning stage; the other two, as noted above, have been implemented.

**4. Switch functions of Museum's Orientation Room and "Making of a Revolutionary" gallery to gain additional changing exhibit capacity and indoor public programs space.**

This project was completed considerably ahead of schedule.

**5. The ongoing effort to create outreach educational programs will continue in FY 17.**



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### MEMORANDUM

**TO:** Board of Regents, James Monroe Museum  
**FROM:** Scott Harris, Director *SHH*  
**DATE:** October 19, 2016  
**RE:** Summary of Findings from StEPS Self-Study

StEPs (Standards and Excellence Program for History Organizations) is an institutional self-study program designed by the American Association for State and Local History (AASLH) specifically for small- to mid-sized history organizations, including museums. Through a workbook, online resources, and an online community, organizations enrolled in StEPS assess their policies and practices and benchmark themselves against nationally recognized standards.

The program is divided into six sections that can be addressed in any order. In each section, organizations can identify their current practice as Basic, Good, or Better. Each level has its indicators, allowing organizations to set realistic goals and tackle challenges in small, manageable steps. The six sections are:

- Mission, Vision, & Governance
- Audience
- Interpretation
- Stewardship of Collections
- Stewardship of Historic Structures & Landscapes
- Management

Beginning in 2014, the James Monroe Museum began the process of completing StEPS sections as time and resources permitted. The Museum's small staff, and the intensive pace of institutional activity over the last few years, resulted in several interruptions of the process. This is a common reality among history organizations similar in size to the Museum, which is why StEPS is neither a timed exercise nor one that must be completed in a proscribed order.

The summary that follows gives a brief description of each of the six StEPS sections and assessment of the Museum's situation relevant to standards in each section. Where appropriate, specific items that can improve the Museum's level of practice (to Basic, Good, or Better) are noted.



## Section 1: Mission, Vision, and Governance

The Mission, Vision, and Governance section addresses:

- Mission
- Governing documents
- Governing authority
- Governing authority's role in financial management, policy development, and strategic planning
- Ethics
- Support groups

**MVG Standard 1: The institution has a clear understanding of its mission and communicates why it exists and who benefits as a result of its efforts.**

The museum has a clear **mission statement** that is grounded both in interpreting the legacy of James Monroe and supporting the educational mission of UMW. The mission statement was most recently revised and approved by the UMW Board of Visitors in December, 2013. The museum meets Better practices within this standard.

**MVG Standard 2: All aspects of the institution's operations are integrated and focused on meeting its mission.**

The museum meets Better practices in this standard

**MVG Standard 3: The institution's governing authority and staff think and act strategically to acquire, develop, and allocate resources to advance the mission of the institution.**

The museum generally meets Better practices within this standard through relevant sections of the UMW Strategic Plan and Institutional Effectiveness Report. *One element that is lacking is a demographic survey of museum visitors that can provide data useful in allocation of resources, marketing, and programming. A draft survey is being developed by museum staff.*

**MVG Standard 4: The governance, staff, and volunteer structures and processes effectively advance the institution's mission.**

The museum meets Better practices in personnel policies and evaluation, financial accounting, and governance structure. *One element for consideration is evaluation of part-time museum guides (an optional, but not required, practice within Commonwealth of Virginia personnel policies).*

**MVG Standard 5: The governing authority, staff, and volunteers have a clear and shared understanding of their roles and responsibilities.**

As with other standards, the museum meets Better practices. Much of this standard deals with governing authority procedures, in our case those of the Board of Visitors. *One element that is lacking is a distinct **code of ethics** for the museum. This is another common policy of American museums, and staff will prepare a draft code of ethics for the James Monroe Museum to be considered by the Board of Regents, administration, and Board of Visitors.*

**MVG Standard 6: There is a clear and formal division of responsibilities between the governing authority and any group that supports the institution, whether separately incorporated or operating within the institution or its parent institution.**

Financial support for the James Monroe Museum is provided in part through the Friends of the Museum and other donations managed by the UMW Foundation. The structure and operating policies that exist between the University and the Foundation ensure that the museum meets Better practices within this standard.

## Section 2: Audience

The Audience section addresses:

- Marketing and PR
- Audience and visitor research
- Community relations
- Visitor services

**AUD Standard 1: The institution identifies current and potential audiences it serves, and makes appropriate decisions in how it serves them.**

The Museum generally meets most Basic and Good practices in terms of knowledge of its audiences. School programs are evaluated through teacher surveys, as are some of our other public programs. To achieve Better status, all public programs should be evaluated, and a comprehensive survey of daily "regular" visitors must be developed.

**AUD Standard 2: Regardless of its self-identified communities, the institution strives to be a good neighbor in its geographic area.**

The Museum meets Better practices in most indicators, including collaboration with colleague museums, local tourism departments, and community organizations. Examples of the latter include joint programs with the Welsh Society of Fredericksburg, Central Rappahannock Regional Library, and Riverside Center for the Performing Arts.

**AUD Standard 3: The institution demonstrates a commitment to providing the public with physical and intellectual access to the institution and its resources.**

In addition to maintaining a seven-day-per-week schedule for the Museum nearly year-round, public programs on and off-site have expanded greatly over the past five years. These efforts help the Museum meet most of the Better practices for this standard.

**AUD Standard 4: The institution regularly promotes the institution and its activities and thinks strategically about how it shares information.**

The Museum maintains at least Good practices for most indicators relevant to this standard. Creation of a multi-year marketing plan would allow the Museum to achieve Better status.

**AUD Standard 5: The institution is committed to providing a high level of basic visitor services and makes continued improvements in the delivery of those services.**

The Museum meets most of the Better practices in this standard, including visitor access to facilities and services and hospitality training for all staff. Frontline visitor services staff (Museum Guides) regularly receive training and take field trips to other museums and historic sites to learn from colleagues.

## Section 3: Interpretation

The Interpretation section addresses:

- Programs
- Exhibitions
- Publications

### **INT Standard 1: The institution asserts its public service role and places education at the center of that role.**

Better practices are prevalent in this standard, befitting the Museum's essentially educational nature and its affiliation with the University of Mary Washington.

### **INT Standard 2: The institution clearly states its overall educational goals, philosophy, and messages, and demonstrates that its activities are in alignment with them.**

The Museum's mission and vision statements place education at the forefront of its reason for being, and these statements are the foundation for all interpretive programming. Better practices are achieved for most indicators.

### **INT Standard 3: The institution understands the characteristics and needs of its existing and potential audiences and uses this understanding to inform its interpretation.**

In this standard, the Museum maintains Good practices, and would reach Better by more in-depth visitor surveys and evaluation.

### **INT Standard 4: The institution's interpretive content is based on appropriate research.**

Research practices rate as Good throughout, and achieve Better through utilization of such resources as the UMW faculty and scholars at the Papers of James Monroe.

### **INT Standard 5: Institutions conducting primary research do so according to scholarly standards.**

Ditto above.

### **INT Standard 6: The institution uses techniques, technologies, and methods appropriate to its educational goals, content, audiences, and resources.**

Better practices are consistently evident, especially with the ongoing addition of more audiovisual components to exhibits and a greater array of children's activities.

### **INT Standard 7: The institution presents accurate and appropriate content for each of its audiences.**

Better practices are achieved throughout this standard, particularly through development of grade-specific lesson plans for schools.

### **INT Standard 8: The institution demonstrates consistent high quality in its interpretive activities.**

Limited program evaluations and anecdotal evidence from visitor comments indicate that the Museum achieves at least Good practices within this standard a majority of the time. As noted elsewhere, a comprehensive visitor survey would yield more information and should elevate practices to the Better level.

### **INT Standard 9: The institution assesses the effectiveness of its interpretive activities and uses those results to plan and improve its activities.**

Ditto above.

## Section 4: Stewardship of Collections

The Stewardship of Collections section addresses:

- Policies
- Management
- Planning
- Institutional archives
- Collections care and preventive conservation
- Conservation treatment and documentation
- Research
- Public access
- Emergency preparedness

### **COLL Standard 1: The institution owns, exhibits, or uses collections that are appropriate to its mission.**

Collections are particularly appropriate to the Museum's mission, and are utilized in ways that consistently evince Better practices.

### **COLL Standard 2: The institution legally, ethically, and effectively manages, documents, cares for, and uses the collections.**

The Museum achieves Better practices in virtually all areas associated with this standard. Notable elements supporting this conclusion are an up-to-date collections inventory and computerized collections database; a collections management policy approved by the UMW Board of Visitors (governing authority); and policies pertaining to conflicts of interest and ethical practices mandated for Commonwealth of Virginia agencies. One element that is lacking is a specific code of ethics for the Museum, which staff will develop for review and approval.

### **COLL Standard 3: The institution's collections-related research is conducted according to appropriate scholarly standards.**

Practices within this standard generally achieve Good status, primarily because of limited staff time for in-depth research. Reallocations of staff functions in 2016 were designed in part to permit the curator to devote more time to collections-based research.

### **COLL Standard 4: The institution strategically plans for the use and development of its collections.**

The Museum has Good practices in this area, and could possibly attain Better status through a strategic collecting plan. However, current funding levels and space limitations are obstacles to development of such a plan.

### **COLL Standard 5: Guided by its mission, the institution provides public access to its collections while ensuring their preservation.**

Physical collections access, which is limited by available space, meets Basic and Good practices overall. Increasing use of virtual online tools such as social media and recent affiliation with the Google Cultural Institute offer opportunities to meet Better practices for this standard.

## Section 5: Stewardship of Historic Structures & Landscapes

The Stewardship of Historic Structures and Landscapes section addresses:

- Management
- Preservation
- Policies
- Research and documentation
- Public access
- Public safety

**HSL Standard 1: The institution owns or has legal responsibility for historic structures and landscapes that are appropriate to its mission.**

Better practices are achieved within this standard through the Museum's ownership by the Commonwealth of Virginia and administration by UMW.

**HSL Standard 2: The institution ethically and effectively manages, documents, cares for, exhibits, and uses its historic structures and landscapes.**

The Museum maintains mostly Better practices through its interaction with the UMW Facilities Services Department for building management and improvements. Care of collections housed in the Museum is practiced by staff.

**HSL Standard 3: The institution's research of its historic structures and landscapes is conducted according to appropriate scholarly standards.**

Prior research, including documentary investigation and archaeology, was carried out by the UMW Center for Historic Preservation and academic Department of Historic Preservation. The amount and quality of the information obtained resulted in Better practices for this standard.

**HSL Standard 4: The institution strategically plans for the maintenance, use, and development of its historic structures and landscapes.**

The Museum relies upon the UMW Department of Facilities Services, relevant Commonwealth agencies, and approved contractors for planning and maintenance that achieve Better practices in this standard.

**HSL Standard 5: The institution has identified and is implementing appropriate treatments of its historic structures and landscapes consistent with physical and documentary evidence, mission, and plans.**

Ditto above.

**HSL Standard 6: Guided by its mission, the institution provides public access to and interpretation of its historic structures and landscapes while ensuring their preservation.**

Better practices are achieved in this standard through the Museum's seven-days-per-week operating schedule nearly year-round. Included in these practices are provisions for rental use of Museum facilities governed by a contract and operating policies.

**HSL Standard 7: The institution considers and implements sustainable practices of energy conservation in the operations and care of its historic structures and landscapes that are compatible with the site's mission and preservation policies.**

The age and National Historic Landmark status of the Museum building permit relatively few opportunities for modification to achieve sustainable energy conservation, resulting in merely Basic practices within this standard. However, Museum staff practice materials recycling on a considerable scale.

## Section 6: Management

The Management section addresses:

- Fiscal responsibility
- Fundraising and long-term sustainability
- Space allocation
- Safety and security
- Facility care and visitor amenities
- Risk management
- Compliance with laws, codes, and regulations
- Institutional planning
- Job performance evaluation
- Records management and institutional archives

**MGMT Standard 1: The institution legally, ethically, and responsibly acquires, manages, and allocates its financial resources in a way that advances its mission.**

The Museum achieves Better practices through utilization of personnel and policies from various UMW entities, including the Department of Finance, Office of Advancement, and UMW Foundation. Oversight by various executive and legislative bodies of Commonwealth government also ensures Better practices.

**MGMT Standard 2: The institution operates in a fiscally responsible manner that promotes its long-term sustainability.**

Ditto above.

**MGMT Standard 3: The institution allocates its space and uses its facilities to meet the needs of the collections, audience, and staff.**

Space allocation is limited, and results in largely Good practices within this standard. If additional space is available in the future, either adjacent to the Museum or on the UMW campus, Better practices may be realized.

**MGMT Standard 4: The institution has appropriate measures to ensure the safety and security of people, its collections and/or objects, and the facilities it owns or uses.**

In addition to Museum staff responsibilities for safe and secure operations, various UMW departmental resources support Better practices within this standard. Museum and University emergency preparedness plans are in place, and the Museum's security and fire alarm systems are monitored by the UMW Police. Integrated pest management practices are carried out by Museum staff and a contracted firm.

**MGMT Standard 5: The institution has an effective program for the care and long-term maintenance of its facilities.**

The resources of the UMW Department of Facilities Services help the Museum attain Better practices.

**MGMT Standard 6: The institution is clean and well-maintained, and provides for visitors' needs.**

The Museum has a contract for weekly janitorial service, which correlates with Basic to Good practices. It is hoped that the operating budget will be able to increase this service level to at least twice weekly in the future. Notwithstanding this limited service, the Museum is clean and well-maintained for a building of its age and level of public activity.