

NEH Application Cover Sheet (PE-277137)

Preservation Education and Training

PROJECT DIRECTOR

Jennifer Ortiz
Museum Services Manager
617 East South Temple
Salt Lake City, UT 84102-1177
USA

E-mail: jenniferortiz@utah.gov
Phone: 8012457288
Fax:

Field of expertise: Museum Studies or Historical Preservation

INSTITUTION

Utah Division of Arts & Museums
Salt Lake City, UT 84102-1777

APPLICATION INFORMATION

Title: *Utah Community Preservation Program (UCPP)*

Grant period: From 2021-03-20 to 2024-02-28

Project field(s): History, General

Description of project: Utah Field Services seeks a NEH Preservation and Access Education and Training grant to establish a new Utah Community Preservation Program (UCPP). This project will develop, implement and test a comprehensive set of virtual and on-site, culturally appropriate, training and mentorship activities, designed to elevate the preservation literacy (knowledge and skills) of museum/collections stewards across Utah through more than 1,000 engagements. After the three-year project period ends in early 2024, Utah Field Services (UFS) will sustain UCPP.

BUDGET

Outright Request	347,604.00	Cost Sharing	168,059.00
Matching Request	0.00	Total Budget	515,663.00
Total NEH	347,604.00		

GRANT ADMINISTRATOR

Jennifer Ortiz
617 East South Temple
Salt Lake City, UT 84102-1177
USA

E-mail: jenniferortiz@utah.gov
Phone: 8012457288
Fax:

Project Impact and Significance of Humanities Collections Served

Utah Field Services (UFS) is a partnership between the Utah Division of Arts & Museums' Office of Museum Services and Utah Humanities' Center for Community Heritage. Separately and together, these agencies support statewide efforts to preserve and improve access to humanities collections by offering support and technical assistance to Utah's museums and collecting institutions, including grant funding, training, onsite assessments, and mentored project assistance in a wide range of museum operations, preservation, and interpretation topics.

Utah Field Services seeks a NEH Preservation and Access Education and Training grant to establish a new **Utah Community Preservation Program (UCPP)**. This project will develop, implement and test a comprehensive set of virtual and on-site, culturally appropriate, training and mentorship activities, designed to elevate the preservation literacy (knowledge and skills) of museum/collections stewards across Utah through more than 1,000 engagements. After the three-year project period ends in early 2024, Utah Field Services (UFS) will sustain UCPP.

Historically, UFS has provided programming that is reactive to the immediate needs expressed by its constituents. However, the need for a more strategic approach to solving the limits to staffing -- and therefore reach -- is apparent. A systematic approach to planned offerings that allows for collecting institutions to engage with our respective offices on a calendared basis, along with dedicated staff focused solely on their success, is crucial.

NEH grant funds will be the catalyst that empowers UFS to build capacity and enhance the knowledge and experience of UFS staff and partners so that new ground can be broken. As is the case nationally,¹ the challenge of preserving and making accessible Utah's large and diverse cultural holdings is enormous, and the need for knowledgeable museum/collections stewards in Utah is significant and ongoing. NEH's grant funds will ensure that cost and time barriers are broken down so that we can engage as many participants as possible. UCPP will empower UFS to expand beyond museums to include other institutions holding collections, including historical societies, archives, libraries, tribal organizations and other types of non-traditional collecting community groups.

UCPP is designed to be as inclusive as possible for all interested museum/collections stewards; however, as the research indicates, there is an immediate need to focus on developing an effective training/mentorship program that includes culturally appropriate practices specifically geared toward small museums from rural and under-represented communities, including Utah's tribes. To aid UFS in this process, partnerships and collaborations with a range of state-level agencies (including Utah State Archives, Utah Division of Indian Affairs, Utah Division of Multicultural Affairs) will be leveraged.

How UCPP will Preserve and Improve Access to Utah's Humanities Collections

The Utah Community Preservation Program (UCPP) will preserve and improve access to Utah's humanities collections through the following activities:

1) Virtual and On-Site Education and Training

This project will develop and implement a reliable, regular calendar of virtual and regional on-site training activities specifically targeted to small museums/collecting institutions from rural areas throughout Utah. Virtual training will be readily available to collecting institutions throughout the state, while in-person training will utilize an experiential approach, where

¹ Institute of Museum and Library Services, [Protecting America's Collections: Results from the Heritage Health Information Survey](#), 2019.

participants “learn by doing” through individual assignments that meet their own institutional needs. Training topics will include the following (*see Attachment 7 for detail*):

- Preventive preservation best practices
- Preservation and access strategies for a range of object types (digital media, archival, 2D and 3D objects, textiles, artwork, etc.)
- Ethical, legal, and culturally appropriate practices (e.g., managing material from under-represented communities, restricted/sacred material, community stewardship, etc.)
- Risk assessment and disaster preparedness and response
- Collection advocacy and fundraising

2) *Community Preservation Team (CPT)*

Using a community-based approach to establish a statewide network of personnel trained in collections care best practices, this project will develop and support a Community Preservation Team (CPT) which will connect stewards from small, rural areas to professionals and colleagues from around the state. As Community Preservation Team members, this cohort will be responsible for “deepening the bench” of individuals in Utah who are professionally trained and available to consult on collection care matters.

The **significance** of what UCPP aims to accomplish is profound. Utah has a vast holding of hidden cultural materials that are essential to the American story. The collections of Utah’s museums/collecting institutions are widely dispersed across a broad geography throughout the state. However, as the following data set will demonstrate, the lack of a cohesive knowledge and skills base presents substantial preservation and accessibility barriers.

The State of Utah is just one of two states in the nation that lack both a state heritage museum and collections management facility. Without such facilities, Utah’s material culture is distributed among small local institutions, which capture local history and culture and provide residents with a sense of community. Residents want cultural resources to be maintained locally because these collections contain their community’s collective memory. Utah’s local collections complement the holdings of the state’s major institutions and collectively they represent the comprehensive narrative of Utah’s historical, cultural, and artistic experience. This rich cultural heritage is valued for its diversity and size, and its ability to tell the story of Utah -- a crossroad to the West.

This distributed state collection model, however, is not without risks. The Logan Daughters of Utah Pioneers Museum, for example, holds an enormous rag rug hand-made by the women of Cache Valley for the opening of their religious temple in 1884. Incredibly significant, but improperly stored for decades in the museum’s basement, the rug suffered major water and pest damage that could have easily been avoided had the museum personnel been trained in preventive preservation techniques. Or the Western Mining & Railroad Museum’s singular collection of *The Helper Journal* newspaper, which tells the story of people who worked in the underground coal mines between 1880 and 1950, and exists nowhere but the museum. Evaluated during the museum’s first preservation assessment, this collection became an immediate priority for prompt digitization. At the Uintah County Heritage Museum, objects belonging to and made by Chipeta (wife of Ute leader Ouray, who was force marched from her traditional Uncompahgre lands in Colorado to a reservation in Utah), require preservation assessment, stabilization, and tribal consultation. Then there is “Charlie,” the 83-pound custom-built rubber raft that was the first inflatable raft used on the Colorado River System by Buzz Holmstrom and Amos Burg in 1937. Housed at the John Wesley Powell River History Museum, “Charlie” requires fundraising and conservation in order to stabilize it for public display. Without a more comprehensive program of preservation assessments, consistent preservation training, and actively alert eyes and ears on the ground in Utah’s collecting institutions, these types of collections will remain hidden and imperiled. Arguably, the stories

that collections like these tell about Utah are under-represented regionally and nationally, making the need for the UCPP all the more urgent.

Utah Needs Preservation and Access Education and Training

The *Utah Connecting to Collections*² (UC2C) 2010 statewide survey revealed that Utah's widely dispersed local institutions generally lack the technical expertise and resources to adequately preserve their irreplaceable holdings. Although the *2018/2019 Utah Museums Survey*³ does show that inroads have been made in bringing training and educational opportunities to the state's museum personnel, the findings of the UC2C survey have not changed substantially in the decade since its publication:

- Utah's cultural heritage is housed in the publicly accessible collections of 250+ museums, 55 city/county libraries, 21 college and university libraries, 29 county offices, and 93 archives. (This does not include collections held by tribes or non-traditional collecting community groups.)
- The geographic distances between Utah's 448 collecting institutions are vast, and the state's few preservation professionals are isolated in urban areas.
- Most of Utah's cultural heritage institutions are small to medium sized.
- In the 2010 survey, over 56% of respondents believed that less than half of their collection was being maintained in adequate storage conditions.
- About 72% of the state's cultural heritage institutions lacked institutional disaster plans in 2010. Similarly, findings from the 2018/2019 Utah Museums Survey, showed only 30% of respondents having an Emergency Plan.
- Utah collections are susceptible to natural disasters, but are also at risk due to negligence and inadequate housing or storage. 30% of museums responding to the 2018/2019 Utah Museums Survey indicated that collections issues were one of the top 3 challenges facing their organization.
- About 78% of Utah's cultural heritage institutions have no staff members with formal conservation or collections care training. Indeed, more than 80% of Utah museums reported having 4 or fewer paid staff in the 2018/2019 Utah Museums Survey.
- Budget size per organization in Utah is among the lowest in the nation with 85% of the state's heritage institutions spending less than \$10,000 annually on any form of collections care. 45% of museums surveyed in the 2018/2019 Utah Museums Survey indicated that they had annual operating budgets of less than \$25,000.

While the field of Utah collecting institutions is broader than just museums, statistics for the museum sector are indicative of the issues faced in the state. A "small museum"⁴ is defined as having an annual budget of \$250K or less, or 0-3 paid staff members. According to the 2018/2019 Utah Museums Survey conducted by Utah's Office of Museum Services (OMS) cited above, at least 45% of Utah's museums have operating budgets under \$25K, well below the national threshold. When that figure is increased to \$300K, it includes 71% of Utah's museums. Further, 54% have no full-time paid staff, while 32% operate with 1-3 full-time paid staff. By either measure -- budget or staff size -- the majority of Utah's museums are small by national standards.

According to the same OMS survey, most of Utah's museums steward cultural collections: 69% are historical in nature, and another 8% focus on art. Many exist as single-room galleries, are plagued by microscopic budgets, and operate with all-volunteer staff who are highly motivated to collect and preserve cultural material, but do not have access to professional education and training. For these reasons, most of Utah's museum collections stewards are unfamiliar with preservation principles and

² Lyrasis, [Utah Connecting to Collections Project Final Report](#), 2010.

³ Utah Division of Arts & Museums' Office of Museum Services, [Annual Museum Survey, 2018/2019](#), 6/12/2019.

⁴ American Association for State & Local History, ["What is the Definition of a Small Museum Survey Results"](#), 2007.

techniques, and this knowledge gap imperils the successful preservation of Utah's humanities and cultural heritage.

Geographic distances in Utah are considerable, with 60% of the state's museums located in rural areas, some more than 300 miles from the state capital in Salt Lake City. (In the 2018/2019 Statewide Museums Survey, 79% of respondents identified their museums as either "suburban" or "rural").

Moreover, Utah has few conservators in the state who engage in private work. The lack of conservation programs in the Intermountain West, combined with few trained collections professionals in the state, means that Utah's bench of trained collections management and preservation professionals is narrow and concentrated on the Wasatch Front. For example, all five members of the American Institute for Conservation living in Utah are within 50 miles of Salt Lake City.⁵

With a combined staff of three, Utah Field Services' delivery capacity currently relies on sporadic collaboration with other state agencies and contract assistance from professionals already employed in the state's larger institutions. Given these staff limitations and Utah's vast geography, service delivery for collections care has lacked consistency/longevity/sustained impact.

For the past ten years, Utah Field Services (UFS) has laid extensive groundwork in improving knowledge of collections care methods, as well as mentoring projects that have empowered individual organizations to better their preventative conservation practices. UFS has internalized a philosophy of "learning by doing," and its most recent programmatic efforts have focused on mentored projects and programs that emphasize a hands-on, community-based approach.

UFS has had great success implementing projects such as the Collections Technical Assistance Program, an intensive pilot that provided grant funding as well as mentored consulting to address collections challenges identified by each participating museum. The Museum Interpretation Workshop Program uses traveling museum exhibitions and intensive, hands-on training to guide museum staff through issues related to interpretation in their organizations. Similarly, the StEPs-UT program is a multi-year effort aimed at mentoring a cohort of museums through AASLH's Standards and Excellence Program, resulting in improved practices in all 6 program modules, including Collections Stewardship. Additionally, Utah Field Services has on-hand a robust offering of workshop curricula and materials which are deployed on request. *(See Attachment 7 for more information on current and past programs offered by UFS.)*

However, a dedicated, sustained outreach effort is required to bridge the gaps of knowledge, expertise, and hands-on needs that the state's collections currently and collectively face. Through the development and execution of these (and other) projects, UFS staff has learned that the focus on deep impact and organizational change through mentored work is most effective within Utah. By engaging organizations more holistically and focusing on making institutional change, UFS staff have stepped beyond a model that allowed only for training of individuals without any connection to their deeper work or organizational success. Instead, UFS staff members have focused on work that is dedicated to building capacity at these organizations, strengthening them in the long term.

Utah has many documented challenges to the preservation of its humanities collections and the notable material culture that they represent: decentralized control of collections, large geographical distances, poor distribution in the state of professionals capable of this work or operating on the same page, as well as low staffing and limited coordination among the state-level institutions tasked with discrete parts of this overall preservation work. UFS staff is aware of these gaps in service, but currently lack capacity to facilitate a more coordinated, sustainable solution.

⁵ American Institute for Conservation, [Find a Conservator](#), accessed 6/9/2020.

The *Utah Community Preservation Program (UCPP)* is designed to address these challenges by building the human and educational infrastructure needed to foster collaboration among state level partners, create virtual and on-site training curriculum that meets the needs of a range of participants and is culturally appropriate, reach underserved rural areas and under-represented populations such as Utah's tribal communities, and broaden the number of people trained and engaged in this work going forward.

The successful implementation of the UCPP would result in better collections care by improving the skills and awareness of those responsible for their stewardship. Beyond the basic training offered, parts of the training curriculum are designed to incorporate mentored projects onsite so that training is carried through to actual institutional improvement outcomes. A consistently-delivered preservation curriculum will allow the rotating population of museum/collection stewards in the state to reliably access the preservation education they need. In addition, such a training curriculum, once established, will be adapted to expand beyond existing local partners (museums, archives and libraries), to those who have less often accessed services (tribes and other holders of community-based collections). Preservation assessments are an important first step for any collection steward and UCPP will expand access to these assessments to facilitate a stream of well-conceived preservation projects that are prepared to compete for funding from various sources.

UCPP aims to make a significant impact on building lasting and sustainable capacity to elevate a statewide knowledge base and skill set. This first phase of the UCPP will establish a training framework that can be strengthened and replicated region by region through the state over time. Creating a regular schedule of rotating introductory collections workshops is critical to ensuring continued care for the state's humanities collections. Utah's collection management and preservation professionals are concentrated on the Wasatch Front. But once trained, the regionally-based Community Preservation Team will join the roster of those who can be tapped for paid instruction and consultation, thus deepening the bench of individuals Utah Field Services can rely upon to increase coverage throughout the state going forward. Creating a broader network of trained individuals will infuse preventive preservation skills throughout the state. This investment will have a large impact on the preservation of Utah's multicultural heritage well into the future, and may well be a model for other states serving far-flung populations and institutions.

Methodology and Work Plan

The goal of the *Utah Community Preservation Program (UCPP)* is to preserve and improve access to Utah's humanities collections by elevating the preservation literacy of Utah's collections stewards.

Objectives:

- a. Increase the capacity of the Utah Field Services program by immediately hiring and orienting a professional conservator as a new Preservation Outreach Coordinator.
- b. By the end of Year I, develop and test virtual and onsite training activities that include regularly scheduled virtual and in-person regional workshops, as well as mentored project work.
- c. Collaborate with Utah agencies that have material culture preservation missions and constituents in need of UCPP's service offerings.
- d. Conduct preservation assessments for 20 participating organizations over three years.
- e. Connect new and existing available funding opportunities more directly to needs identified with preservation assessments and training.
- f. Deepen bench of knowledgeable local providers by engaging and training a committed group of Utah collecting institution personnel known as the Community Preservation Team (CPT).
- g. Over three years, reach approximately 80 collecting institutions from rural areas and increase the knowledge and skills of museum/collections stewards across Utah through more than 1,000 engagements.
- h. Communicate resources and training opportunities centrally and efficiently.

To meet these goals and objectives, the UCPP is designed with four parts (*see Attachment 4 work plan*):

Part I: Build Capacity to Establish UCPP by Hiring a Full-Time Preservation Outreach Coordinator.

In order to increase the capacity of Utah Field Services to develop the knowledge and skills that elevate the state's museums and collecting institutions personnel to preserve and make accessible their humanities collections, a full-time **Preservation Outreach Coordinator** (Coordinator) must be added to the team. This person will be a professional conservator whose role will be to assist with bridging the gaps of knowledge, expertise, and hands-on needs that the state's collections currently and collectively face. Hired at the beginning of the three-year project, the Coordinator will:

- Design and deliver training curriculum for the two-tiered workshop program (Part II below). Training curriculum will include (but not be limited to): collections care 101, agents of deterioration, and disaster planning and mitigation for cultural organizations in the Intermountain West. Much of this curriculum already exists within the UFS team, but will need revision for uniformity and to adhere to the updated American Association for State and Local History StEPs Stewardship of Collections standards.
- Develop a training implementation plan (workshop schedule) across the state with heavy focus in two of Utah's underserved regions (Uintah Basin spanning through South-central and Southeast Utah).
- Deliver preventative preservation training (online and in-person) to stewards of Utah's collections in Years II and III (Part II below).
- Revise the current Utah Preservation Assessment, a tool created in 2014 and used to conduct site visits at cultural heritage institutions across the state. This 11-part systematic review of how an organization's care of their objects may impact their collection is largely informed by Heritage Preservation's Preservation Assessment markers. The tool will be updated to reflect the most recent advances in collections care and preservation, aligned with the 2020 release of the American Association for State & Local History's StEPs Collections module, as well as cross reference work being done in the archival, conservation, and historical preservation sectors.
- Provide preventative and active conservation consultation for museum collections statewide as a way of becoming familiar with the range of collections care issues faced by Utah institutions and thus inform the UCPP curriculum. This activity augments what is already provided by the UFS team.
- Establish and coordinate the first Community Preservation Team (CPT) cohort (see Part III below), which will include communication with and mentorship of the seven individuals selected to participate in the program. Mentorship in this context means that the Coordinator will provide direct consultation and oversight of a selected on-site collections project with each of the seven CPT members, identified utilizing a Preservation Assessment and implemented with program funding.

Part II: Develop and Test Community Preservation Education Workshop Series.

In order to increase collections care and preservation knowledge and skills among stewards of Utah's humanities collections, UCPP will develop and deliver a schedule of workshops to personnel (staff and volunteers) of Utah's collecting institutions. In Years II and III of the project, UCPP will roll out a two-level workshop program that gives introductory collections training delivered consistently in an online format, as well as more intensive in-person regional opportunities for hands-on learning. The online and regional workshop formats are designed to meet the geographical challenges of the state, as well as the need for both entry-level and intensive learning.

The introductory curriculum aims to create a baseline of collections knowledge for attendees and will be designed according to the following methodology:

- Reliable, regularly-scheduled rotating program of free, short online workshops, combined with low-cost, in-person, two-part regional workshops with small interim assignments.
- Workshop topics will reinforce one another, but not require prior attendance to be useful.
- Collections Care 101 topics centralized on fundamental building blocks (i.e., agents of deterioration, disaster planning and mitigation, care for collections on exhibition and in storage, intellectual control, cultural considerations in collections care, etc.).

The same training curriculum will be delivered each of the two years:

Level 1 | Introductory Online Workshops:

- 12 monthly online workshops per year.
- 2-hour sessions, entry level content, materials available in advance.
- Free registration, open to all personnel working or volunteering in collecting institutions.
- Opportunity for individuals to participate with less of a time and organizational commitment needed. Participants register for as many as they desire.
- The Preservation Outreach Coordinator is the primary instructor, augmented by colleagues drawn from partner agencies or other contractors as needed.

Level 2 | Regional Hands-on Workshops with Small Interim Assignments:

- 4 quarterly in-person regional workshops per year.
- Workshops are full-day, 2-part, separated by 4 weeks, with an interim assignment.
- Introductory content with hands-on learning, with an interim project assignment between the sessions designed for participants to make progress on the topic area at their own institution. Feedback given by instructors as needed.
- Open to all personnel working or volunteering in collecting institutions, but primarily attractive to those in the region.
- Nominal registration fee to accommodate a variety of institutional budgets and needs.
- Travel stipends available to offset expenses of those coming from outside the region.
- No requirement to attend all four workshops, but participants are expected to attend both parts of any workshop they register for.
- Preservation Outreach Coordinator position is primary instructor, augmented by Utah Field Services experienced staff, and/or instructors drawn from relevant partner agencies or otherwise contracted as needed.
- Rotate the location of the workshops to four different organizational hosts around the region (museum or library partners) to enhance networking and peer-to-peer learning and skill building.

The regional workshops will be long enough to engage hands-on learning, as well as incorporate an assignment to be completed between sessions that will progress participating organizations in tangible ways on each topic. For example, instead of just learning about agents of deterioration in a classroom setting, participants would be asked to take an assessment tool from the workshop back to their organizations and return to the second day of the workshop (4 weeks later) prepared to report and discuss the results. Thus, the organization has a start on a simple agents of deterioration assessment that can be built out going forward and prepares each participant to apply the workshop lessons to their own setting. This method of “mentored homework” has proven successful in previous trainings conducted by Utah Field Services (e.g., Collections Policy, Volunteer Recruitment, Exhibition Development, etc.).

Part III: Establish Community Preservation Team (CPT) Cohort

In order to “deepen the bench” of people capable of advising the museums and collecting institutions on preventive preservation, the UCPP will develop a core group of individuals to serve at Utah’s first ever Community Preservation Team (CPT). Individuals from across the state will be trained and evaluated in

best practices for culturally appropriate collections care, and through that process, will have the opportunity to move from being a trainee to becoming a mentor available to others in the state. The CPT training curriculum will be designed according to the following methodology:

- The CPT will comprise 7 individuals, allowing for a small group training setting and one-on-one consultation with the Coordinator and Administrative Team.
- Members of this cohort will be trained to have uniform baseline knowledge in collections care and preservation best practices, and to use the same tools and standards as the Utah Field Services team. This will ensure uniformity of knowledge and practice across the group of people providing technical assistance to Utah's collecting institutions.
- CPT trainees will have two years (Years II and III of the project) to attend all 12 online workshops and all 4 two-part regional workshops (UCPP Part II above).
- In addition, the CPT will be cross-trained on the revised Utah Preservation Assessment as well as the updated American Association for State & Local History's StEPs Stewardship of Collections standards (2020 release).
- CPT trainees will work with the Coordinator to conduct a formal Preservation Assessment on their own organization, and later lead out on a Preservation Assessment on one other organization.
- As a result of their own Preservation Assessment, each CPT trainee will identify a collections care need in their own organization and work in conjunction with the Coordinator to tackle that need within the project period. Each CPT organization will receive a small project stipend to implement its mentored project. This model of "learning-by-doing" has been highly successful in Utah (e.g., 2014/15 Collections Stewardship Workshops, 2016/17 Collections Technical Assistance Program, 2016/20 Museum Interpretation Workshops, 2018/20 StEPs-UT Program), and will improve preservation in tangible ways at each CPT organization.
- CPT members will share out their project successes and challenges with the cohort, using their own institutions as models for improved collections best practices and as a training ground for the cohort.
- As a capstone to the training, onsite mentored project, and the Preservation Assessments, each CPT trainee will pass an assessment to demonstrate competence with the curriculum.
- Once their requirements are complete, members of the CPT will be available to provide preservation support in their respective regions, and be the distributed "eyes and ears" for Utah Field Services.

Level 3 | Community Preservation Team & Certification:

- A single cohort limited to 7 individuals from around the state who are committed to serving as a certified trained community resource in their regions.
- Entry to the CPT course will be by open application and training will be undertaken and completed over the term of the project.
- Successful completion of the CPT certification will require the following:
 - Attend 6 dedicated meetings for orientation, training, networking.
 - Attend all 12 online workshops.
 - Attend all 4 two-part regional workshops and complete the small interim assignments.
 - Pass an evaluation demonstrating understanding of workshop content.
 - Under Coordinator's guidance, conduct an internal Preservation Assessment of their own institution.
 - Complete a mentored project at their own institution as identified in their Preservation Assessment, with a project stipend and support from the Coordinator and UFS staff.
 - Conduct an additional Preservation Assessment (with backup from the Coordinator) at another institution.

- Travel stipends will offset expenses to attend regional workshops (Part II above) and dedicated meetings.
- Preservation Outreach Coordinator is the primary instructor, augmented by the UFS experienced team, and/or instructors drawn from relevant partner agencies or otherwise contracted.

Part IV: Develop Pathways to Sustainability

To effectively communicate, extend, and sustain these activities, the UCPP will:

- Expand the Utah Field Services service offerings through partnerships with Utah agencies and state-level organizations with constituents in need of this training. Partner organizations such as the Utah State Archives, Utah Division of Multicultural Affairs, and Utah Division of Indian Affairs will lend their needed expertise to the curriculum development, in some cases acting as instructors, as well as communicating the opportunities to their constituents.
- Create central communication channels for content and networking, including a Utah Field Services website and preservation listserv for participants.
- Facilitate direct connections between the Preservation Assessment reports and state and national funding opportunities.
- Conduct UCPP evaluation to show how the education and training activities may be improved and to substantiate fundraising to maintain the program going forward.
- Promote Community Preservation Team members' availability in their respective regions.
- Disseminate project results through participation in state, regional, and national professional conferences. Of particular interest to the field will be results of the intensive effort to create a cohort of CPT members as an extended field services network.

Participant Recruitment and Outreach

In addition to promoting UCPP with flyers and introductory sessions at relevant professional conferences, the Administrative Team will use print and electronic newsletters, targeted mailings, outreach meetings, social media, and websites to communicate these training opportunities. UFS agencies maintain comprehensive databases of Utah museums and collecting institutions and maintain regular contact.

Moreover, efforts will be made to expand the reach of the UCPP program, including partnering early with the Divisions of Indian Affairs and Multicultural Affairs to ensure training is reaching diverse communities and collections that may not have traditional collecting institutions in-state. In addition to DIA and MCA, partnering with the Utah Division of Archives, Utah State Library, and the Utah Division of State History's Historical Preservation Office (SHPO), as well as the relevant state professional associations, will ensure the early development of an outreach and implementation plan for these often distinct communities.

The *Preservation Outreach Coordinator* position will be advertised nationally through appropriate professional channels. The project will seek someone interested in developing leadership and teaching skills, as well as focusing on applied preventive preservation in a variety of environments.

The *Community Preservation Workshop Series* will be promoted to individuals who are already working or volunteering in the cultural sector. Many of Utah's museum and collecting institution personnel are those who have learned on the job and still require basic collections care training. There will be no participation prerequisites for this general audience. The two-part in-person workshops will be geared to underserved regions of Utah (Wasatch Back and Uintah Basin in Year II, and Eastern/Southeastern Utah in Year III). A nominal fee will be charged for in-person regional training to maintain commitment to attendance.

Individuals interested in becoming part of the *Community Preservation Team* (CPT) cohort will submit an application online detailing why they wish to participate, how the advanced training will benefit their community and region, and what past collections training they have done on their own or with the Utah Field Services program in the past. Applicants must indicate that they have support from their sponsoring institution to participate and indicate willingness to provide continued support and consultation in their respective communities for three years beyond their certification. The application process will be open and competitive for the 7 available slots, and preference will be given to those located off the Wasatch Front in underserved regions.

Evaluation

Kari Ross Nelson, MA MS, will be engaged to evaluate the project. In addition to her active practice of evaluating museum programs and exhibitions, Nelson has experience helping arts and culture organizations, including providers of field services, implement evaluation frameworks into their practices. Nelson is currently working with Utah Humanities and the Utah Division of Arts and Museums to evaluate a Utah-specific jumpstart pilot of the AASLH StEPs Program. She will take a similar approach to evaluating this project: working with administrators to articulate goals and indicators of success, and then identify and collect data needed to inform mid-course and summative changes that will ensure the viability of the project. (*See Attachment 7 for a proposed scope of evaluation work*)

Staff, Faculty and Consultants

The UCPP will be implemented by the following key personnel:

Administrative Team

The UCPP is a multi-partner effort with these responsibilities shared by the Administrative Team:

- Recruitment and management of Preservation Outreach Coordinator: Recruit, hire, and supervise preservation outreach coordinator, and provide training, support, and oversight over the course of the program.
- Recruitment and management of instructors: Identify, contract, and supervise instructors, and provide training, support, and oversight through curriculum development and training rollout.
- Recruitment and management of participating organizations: identify and contract CPT trainees, communicate and provide support over the course of the program.
- Meeting and Training Logistics: identify and secure meeting locations, coordinate onsite needs for instructors, training materials, and day-of logistics coordination.
- Site Consultation: Face-to-face onsite consultation with participating organizations.
- Evaluation: Coordinate with evaluator to assess effectiveness and value of the UCPP.
- Financial Management: oversee project expenditures, grant compliance, and distribution of funds.
- Publicity: Coordinate communication of project including updating partner websites, PR, for training opportunities, and communication of program significance.

The Administrative Team is comprised of the three staff members working together as the Utah Field Services Team (which have been collaborating since 2015 on several field services projects) and the Preservation Outreach Coordinator (*See Attachment 3 for resumes and job description*):

- Jennifer Ortiz, Museum Services Program Manager, Office of Museum Services, Utah Division of Arts & Museums (Authorizing Agent)
- Emily Johnson, Museum Services Specialist, Office of Museum Services, Utah Division of Arts & Museums (Project Director)
- Megan van Frank, Director, Center for Community Heritage, Utah Humanities

The Preservation Outreach Coordinator will be hired during the Year I Planning phase in order to assist with the development and implementation of the Community Preservation program. S/he will have a

graduate degree in conservation with a focus on preventative maintenance and care, in addition to expertise in bench work (preferably on three-dimensional objects and/or textiles), and skill in teaching.

Instructors

UCPP Instructors will be talented cultural sector professionals with experience working with small and mid-size collecting organizations (museums, historical societies, archives, etc.) and have sensitivity to their challenges. Instructors must be self-motivated, able to work independently, organized, flexible, and have excellent communication skills. Instructors will be experts in the content area for which they are responsible. Instructors will utilize existing curriculum where possible but amend or augment where necessary. Instructors will create agendas, PowerPoint presentations, hands-on learning experiences, and all associated training materials.

- The Preservation Outreach Coordinator will be the anchor instructor.
- Each member of the Utah Field Services Team is a collections management professional experienced in field services work and teaching. They will be drawn upon to instruct as needed.
- Professional staff working in the Partner agencies may be called upon to provide instruction in their areas of specialty as needed.
- Professional staff working in larger cultural institutions may be contracted as needed.

Partners

Collaborative alliances with partner agencies will be essential to the success of this project. Colleagues in these agencies will assist the Administrative Team review the implementation plan, advertise to and engage their constituents to take advantage of the training, as well as provide workshop instructors as relevant. Partner organizations will provide expertise, promotion, and general support:

- Utah State Archives
- Utah State Library
- Utah Division of State History - State Historic Preservation Office
- Utah Division of Indian Affairs
- Utah Office of Multicultural Affairs
- International Daughter of the Utah Pioneers
- Utah Museums Association
- Utah Library Association
- Mountain West Digital Library

In addition, local partner organizations (e.g., museums and libraries) will contribute meeting space for the in-person regional workshops.

Evaluator

Utah Field Services will engage Kari Ross Nelson, MA MS, to evaluate the UCPP using an outcome-based approach. Ms. Nelson is a program planning and evaluation consultant with an excellent track record designing outcome based assessment frameworks for arts and humanities organizations. Ms Nelson will begin by working closely with the Administrative Team to hone the project's logic model, which will focus specifically on the outputs and outcomes to be measured, with indicators, data sources, and targets. The program goals (identified above) will be used to guide the model's development and its measures. (*See Attachment 3 for resume and Attachment 7 for scope of work.*)

Summary of Deliverables

UCPP activities include the following over the course of a three-year period (2021-2024):

- Establish a three-year Preservation Outreach Coordinator position for a conservation professional
- Develop a comprehensive preservation curriculum (based on state and national sources)

- Deliver 24 monthly 2-hour online workshops on preservation topics
- Deliver 8 two-part all-day regional workshops with onsite project components (16 sessions total)
- Deliver 3 one-part half-day workshops as part of annual conferences (as teasers)
- Train 7 Community Preservation Team members
- Deliver 6 dedicated meetings for CPT members
- Conduct 7 onsite mentored preservation projects
- Conduct 20 onsite preservation assessments
- Create a Utah Field Services website and preservation listserv to aid communication
- Conduct program evaluation
- Communicate project results through participation in state, regional, and national conferences
- Expand field services delivery through collaborative alliances with state-level Utah agencies

Collectively, these activities will serve approximately 80 collecting institutions from rural areas through more than 1,000 engagements from museum/collections stewards across Utah.

COMPONENTS REQUIRED

Attachment 1: Narrative

Attachment 2: List of project personnel

Attachment 3: Résumés and job descriptions

Attachment 4: Work plan

Attachment 5: Letters of commitment and support

Attachment 6: History of support (**not applicable/not included**)

Attachment 7: Additional supporting documentation

Attachment 8: Budget and budget justification

ATTACHMENT 2 | LIST OF PROJECT PERSONNEL

List in alphabetical order, surnames first, all project personnel and collaborators and their institutional affiliations. This list should include advisory board members and authors of letters of support, if applicable. Name the file personnel.pdf.

- GRAHAM, Jodi | Executive Director, Utah Humanities (Author of letter of institutional commitment)
- HAYNIE, Robyn | Conservator and Registrar, Colorado Springs Fine Arts Center, Colorado College (Author of letter of support)
- JOHNSON, Emily | Museum Services Specialist, Office of Museum Services, Utah Division of Arts & Museums (Project Director)
- NELSON, Kari Ross | Independent Evaluation Consultant
- ORTIZ, Jennifer | Museum Services Program Manager, Office of Museum Services, Utah Division of Arts & Museums (Authorizing Agent)
- PRESERVATION OUTREACH COORDINATOR | a professional conservator dedicated to this project hired during the Year I planning phase
- VAN FRANK, Megan | Director, Center for Community Heritage, Utah Humanities

ATTACHMENT 3 | RESUMES & JOB DESCRIPTIONS

Include résumés for persons occupying the key positions described in the budget, not to exceed two pages in length per person. In the event that a biographical sketch is included for an identified individual who is not yet hired, include a letter of commitment from that person with the biographical sketch. If you are hiring additional staff to work on the project, include a job description in this attachment. Name the file resumes.pdf.

A) RESUMES (ATTACHED)

- JOHNSON, Emily | Museum Services Specialist, Office of Museum Services, Utah Division of Arts & Museums
- NELSON, Kari Ross | Independent Evaluation Consultant
- ORTIZ, Jennifer | Museum Services Program Manager, Office of Museum Services, Utah Division of Arts & Museums
- VAN FRANK, Megan | Director, Center for Community Heritage, Utah Humanities

B) JOB DESCRIPTION

- PRESERVATION OUTREACH COORDINATOR | a professional conservator dedicated to this project hired during the Year I planning phase

The Utah Division of Arts & Museums Office of Museum Services (UA&M OMS) is seeking a Preservation Outreach Coordinator. This is a Temporary Labor (TL) full-time position starting May 2021 and ending in February 2024. This position contributes to the mission of UA&M by helping build sustainable museum organizations via educational programs, outreach, and one-on-one training opportunities for collecting institutions in Utah.

This position offers potential for professional growth through varied and challenging activities. The responsibilities of this position include:

- Developing, presenting, and organizing educational programs and workshops
- Conducting on-site preservation needs and risk assessments with written reports
- Assisting institutions with disaster response and emergency preparedness initiatives
- Mentoring personnel in collecting institutions with individual preservation projects
- Providing technical information via telephone, e-mail, and in person on preservation topics
- Writing preservation-related bulletins and articles for publication

Required qualifications include: MS/MA in Conservation; training in and a thorough understanding of preservation principles, practice, and issues; excellent written, verbal and interpersonal communication skills; ability to work independently; familiarity with conducting and writing preservation assessments and other planning documents for cultural institutions; and talent in teaching and public speaking. Candidates with background or demonstrated interest/experience in preventive preservation, expertise in bench work (three-dimensional objects and/or textiles), and curriculum development will receive preferential consideration. Travel is required.

Emily A. Johnson

(b) (6)

(b) (6)

(b) (6)

WORK EXPERIENCE

Utah Division of Arts and Museums

Museum Services Specialist 2017 – present

- Developed, designed, and presented workshops, lectures, and trainings to diverse groups of people, increasing museums' organizational capacity throughout the state
- Maintained superb customer service and collaboration with a variety of clients and partners, including museums, policy makers, and other state agencies
- Assisted grants program in awarding project and operational support grants, connecting our constituency to State services
- Employed consistent use of evaluation and surveying methods to ensure the greatest possible quality of delivered instructional content

Collections Curator and Registrar 2012 - 2017

- Directed state-owned art collections management and related documentation, focusing on improving public access to digital records; updating workflow processes with technological innovations; improving data capture related to the collections; and managing storage construction projects
- Maintained all pertinent contracts and agreements as they applied to the collections and the function of the program
- Managed project budgets, prioritized and advised on the expenditure of operating budgets within the mission and scope of the agency
- Experience working with Salesforce as a CRM and as a CMS, FileMaker, Basecamp, Adobe Creative Suite, as well as some project management training

EDUCATION

University of Utah

MA in History, 2012

Focus in Public History and the American West

- Thesis: "Steady As She Goes: The Women of Nevills Expedition, 1936-1949"
- Teaching Assistantship, 2010-2012
 - Directed online and on-campus students in coursework and exams, study guides and test preparation, as well as administered all grades
- Winner of Utah State History's Helen Papanikolas Award to the best college/university student paper, 2011

University of Utah

BA in History, 2010

- Undergraduate Research Scholar, completing laboratory research for microarchaeology projects from Anatolia

PROFESSIONAL SERVICE AND MEMBERSHIPS

Utah Museums Association Board of Directors

Western Museums Association

American Association of State and Local History

Museum Computer Network

Kari Ross Nelson

(b) (6)

• (b) (6)

• (b) (6)

Experience

2014-Present

Kari Ross Nelson LLC

Principal

karirossnelson.weebly.com

Research, evaluation, and visitor studies in informal learning environments.

2015-Present

Thanksgiving Point Institute, Lehi Utah

Research and Evaluation Associate

Research, evaluation, and visitor studies across multiple informal learning venues

2007-2019

Museum of Peoples and Cultures at Brigham Young University, Provo Utah

Curator of Education

Student mentoring in museum practices, lecturer in museum studies

Professional Activities

Teaching

Brigham Young University: Anthropology 414 Museum Projects, Anthropology 311/511 Museums and Culture

StEPS-UT: Audience Module

Publications

Luke, J.J. et al. (2019) What caregivers observe about their children's learning during a visit to the children's museum. *Journal of Museum Education*, In Publication.

Ashton, S., Johnson, E., Nelson, K.R., Ortiz, J. and Wicai, D. (2019) Brace for Impact. *Museum*, 98 (3), 26-31.

Nelson, K.R. and Rivera, N. (2018). *Caregivers' Perceptions of Learning in Children's Museums*. Hand to Hand, Hand to Hand, Vol. 32 No. 1.

Nelson, K.R. (2018). *Designing Motivating Signage in a Water-Wise Garden*. Public Gardens, Vol. 33 Issue 4.

Nelson, K.R. and Tonsgard, A. (2017). *Defining Play: Practical Applications*. Hand to Hand, 21:2-3.

Ashton, S., Nelson, K.R., and Milward, L. (2017). Careers in Museum Learning: Making a Difference in Museums Through Instructional Design. In R.E. West (Ed.) *Foundations of Learning and Instructional Design Technology*. Ed Tech Books. <http://edtechbooks.org/lidtfoundations>

Nelson, K. R. (2015). Application of Merrill's First Principles of Instruction in a Museum Education Context. *Journal of Museum Education*, 40(3), 304-313.

Warr, M. C., Nelson, K. R., & West, R. E. (2014). Cognition and Instruction. *Educational Technology*, 54(2), 26-31.

Professional Presentations (recent)

Utah Museums Association, 2019, co-presenter, session chair: "Do We Need an Education Core Document?"

Visitor Studies Association, 2019, co-presenter, session chair: "The Great Outdoors: Visitor Studies and Evaluation in Outdoor Settings."

Association of Children's Museums, 2019, co-presenter: "Findings and Implications of the Children's Museum Research Network."

American Public Gardens Association, 2019, co-presenter, session chair: "Get on the Path to Understanding Your Visitors."

Visitor Studies Association, 2018, co-presenter: "Researching from a Field-Wide Perspective."

Association of Children's Museums, 2018, co-presenter: "What Were They Thinking? Exploring Parent and Caregiver perceptions of learning in Children's Museums."

American Public Gardens Association, 2018 "Getting Creative with Interpretive Signage."

Visitor Studies Association 2017, full day workshop co-presenter with Beverly Serrell: "Exhibition Timing and Tracking: What's it Good for? Show Me the Data!"

Visitor Studies Association 2017, co-presenter: "Children's Museum Research Network: A Case Study in Collaborative Research."

Other

Utah Museums Association: 2019 Phil Notoriani Award for dedication, service, and commitment to Utah's Museum Community.

Children's Museum Research Network, 2015 to present

Utah State Office of Museum Services, Grant Reviewer 2018

American Alliance of Museums: 2014 Conference Fellowship in Museum Education

Education

Brigham Young University

MS in Instructional Psychology and Technology, emphasis in research and evaluation, 2016

Thesis: Formative Evaluation of the Interpretive Signage in a Water-Wise Garden

San Francisco State University

MA in Museum Studies, emphasis in museum education, 1994

Thesis: Application of the Americans with Disabilities Act in Museums

Brigham Young University

BA in Classical Civilizations, 1992

Six-month study in Vienna, Austria

JENNIFER ORTIZ

Cultural Heritage Professional,
Instructor, & Facilitator

Contact

(b) (6)

jenniferortiz@utah.gov

Education

CLAREMONT UNIVERSITY | 2017

Getty Leadership Program, NextGen

UNIVERSITY OF UTAH | 2014

Certificate in Non-Profit Leadership & Management

TUFTS UNIVERSITY | 2011

Master of Arts, History & Museum Studies

UNIVERSITY OF SAN FRANCISCO | 2009

Bachelor of Arts, History & Latin American Studies

Experience

MUSEUM SERVICES MANAGER

Utah Division of Arts & Museums | 2016-Present

Oversee the state's Museum Services Program and staff, which provides ongoing support, technical assistance, and professional development opportunities to over 250 museums.

Noted Accomplishments:

- Launched and completed a statewide pilot of a Social Impact Study representative of all museums in the state; research is currently being distributed at museums.utah.gov/impactstudy
- Launched first StEPs-UT cohort in the state, a pilot based on national cultural heritage curriculum
- In FY20, reviewed & distributed over \$1.2 million in museum grants statewide, emphasizing support for small and rural area museums
- Established and strengthened critical community partnerships with cultural support agencies such as the Utah Museums Association, Utah Humanities, Utah State History, & the Utah Tourism Bureau

MUSEUM SERVICES SPECIALIST

Utah Division of Arts & Museums | 2014-2016

Revived the Office of Museum Services after a hiatus of six years by providing professional development opportunities to museum employees in Utah.

COLLECTIONS MANAGER

Utah Museum of Fine Arts | 2011-2014

Oversaw the storage, safety, and daily stewardship of over 20,000 permanent collection objects on & offsite.

Professional Associations

- **Board Member** | American Association for State & Local History | 2019-Present
- **Peer Reviewer** | Museum Assessment Program | American Alliance of Museums | 2018-Present
- **State Representative** | Secretary & Member | Field Services Alliance | American Association for State & Local History | 2017-Present
- **Member & Past Program Committee Chair** | Western Museums Association | 2013-Present
- **Member & Past Board Member** | Utah Museums Association | 2012-Present

Selected Presentations & Publications

2020

- "Doing History With..." American Association for State & Local History. Winter 2020. History News. Volume 75.

2019

- "Brace for Impact: Utah is Conducting A Pilot Study to Show the Social Impact of the State's Museums." American Association of Museums. 2019. Museum. Washington, DC: Assoc. <http://www.aam-us.org/pubs/mn/index.cfm>.
- Fundraising TIPS 101, American Association for State & Local History Annual Conference, Philadelphia, PA, session proposer and moderator
- Scaling Best Practices to Fit Your Museum, Western Museums Association Annual Conference, Boise, ID, session proposer and moderator
- Scaling Best Practices to Fit Your Museum, a round-table discussion, Utah Museums Association Annual Conference, Brigham City, UT, session proposer and moderator
- Women & the Museum Field: a Facilitated Conversation, Utah Museums Association Annual Conference, Brigham City, UT, session proposer and speaker
- How Libraries, Museums, and Cultural Organizations Work Together, a Facilitated Discussion, Utah Library Director's Summit, Heber, UT, session speaker
- Collections Care & Museum Grants, Utah State Parks Summit, Richfield, UT, session speaker

PROFESSIONAL EXPERIENCE

**Center Director
2016-present****UTAH HUMANITIES | Center for Community Heritage | Salt Lake City, Utah**

Direct statewide programs for Utahns to explore, preserve, and share their unique community history, culture, and traditions. Provide resources, funds, hands-on training, and technical assistance to museums and cultural organizations in Utah. Responsible for program design, case-making, delivery, and evaluation, as well as management of contract staff and annual program budget of \$500K+.

Current duties include:

- Develop and deliver training workshops with on-site project components in museum interpretation, collection stewardship, oral history, StEPs standards, and grant-writing.
- Mentor small museums creating interpretive exhibits (80 exhibits in the 2010-2020 period).
- Orchestrate statewide tours of national exhibitions, supporting development of local companion components and curating related programming.
- Produce weekly *Beehive Archive* history radio program for 3+ million listeners.
- Establish and manage organizational partnerships and conduct statewide outreach.

**History & Museums
Program Officer
2009-2015****Collections
Move Manager
2007-2009****UTAH MUSEUM OF FINE ARTS | Collections Department | Salt Lake City, Utah**

Managed relocation of permanent collection (20,000+ objects) from off-site facility to new museum storage. Implemented inventory, bar-coding, mount-making, packing, transport, storage, and related record-keeping. Trained and supervised team of 30+ staff and volunteers. Set goals, created systems and procedures, monitored progress. Accomplished in record time with no object loss or damage.

**Field & Lab
Volunteer
2007****UTAH DIVISION OF STATE HISTORY | Antiquities Section | Salt Lake City, Utah**

Assisted state archaeologist with cultural resources inventory of the 'Prison Site', an Archaic encampment in Salt Lake Valley. Conducted survey and excavation work, as well as documentation and processing of artifacts. Trained as preservation site steward.

**Collections
Assistant
2006-2007****UTAH MUSEUM OF NATURAL HISTORY | Anthropology Section | Salt Lake City, Utah**

Cared for cultural collections, including preventive conservation projects, accessions, inventory, data entry, as well as provided live interpretation at public events.

**Collections
Officer
2004-2006****SYDNEY UNIVERSITY MUSEUMS | University of Sydney | Sydney, New South Wales**

Manage collection projects at the Macleay Museum of Natural History, Nicholson Museum of Antiquities, and University Art Gallery. Planned and implemented three collection moves (9000+ objects). Developed disaster preparedness plan and collections policy. Carried out exhibition rotations and directed graduate interns.

**Collections
Manager
& Curator
1998-2004****AUSTRALIAN MUSEUM | Anthropology Branch | Sydney, New South Wales**

Responsible for all aspects of the management and interpretation of cultural collections from North and South America, Asia, and Africa (16,000+ objects). Managed collections, records, research, and access. Curated exhibitions. Revised collection policies and procedures as part of new database rollout. Supplied training and assistance to database users and outreach training to statewide Aboriginal cultural centers. Directed graduate student interns and volunteers.

EDUCATION

**Bachelor of Arts
*cum laude*****MOUNT HOLYOKE COLLEGE, South Hadley, Massachusetts**

- Interdisciplinary studies in history, anthropology, and politics awarded high honors for thesis

**Professional
Education**

- Museum studies
- Collections care & preservation
- Exhibition design & interpretation
- Heritage management
- Project management
- Non-profit management
- Information technology
- Database management

- 2018 | American Association for State & Local History | Leadership in History Award for Utah Tour of *The Way We Worked*
- 2017 | Utah Museums Association | Award for Excellence in Statewide Collaboration
- 2015 | Utah Museums Association | Phil Notarianni Distinguished Service Award for exceptional dedication and tangible commitment to Utah's museum community
- 2012 | American Association for State & Local History | Leadership in History Award for Museum Interpretation Initiative

PROFESSIONAL SERVICE & ASSOCIATIONS

- 2020-present | National Awards Committee Member | American Association for State & Local History
- 2019-present | Annual Meeting Local Arrangements Team | National Council for Public History
- 2012-present | National Advisory Group | Smithsonian Traveling Exhibition Service | Museum on Main Street Program
- 2012-present | State Representative & Past National Leadership Committee | Field Services Alliance | AASLH
- 2013 | Grant Review Panelist | Institute of Museum & Library Services
- 2012 | Grant Review Panelist | Utah Division of Arts & Museums
- 2012 | Annual Meeting Host Team | American Association for State & Local History
- 2010-2014 | Judge | Utah History Fair (part of National History Day)
- 2009-present | Member | American Association for State and Local History
- 2006-present | Member & Past Program Planning Team | Utah Museums Association

SELECTED EXHIBITIONS, PUBLICATIONS & PRESENTATIONS

- Utah curator & tour director, *H2O Today and Water / Ways*, Smithsonian Traveling Exhibition Service, 2020-2021
- Utah curator & tour director, *Speaking Volumes / Transforming Hate*, Montana Human Rights Network, 2018
- Utah tour director, *The Way We Worked*, Smithsonian Museum on Main Street, 2017-2018
- Utah tour director, *Journey Stories*, Smithsonian Museum on Main Street, 2014-2015
- Utah tour director, *New Harmonies*, Smithsonian Museum on Main Street, 2010-2011
- Editor & publication manager for Smoak, Gregory E., *Think Water Utah*, SLC, UT: Utah Humanities, 2020
- Author, "Doing History with Megan van Frank," *History News*, American Association for State & Local History, Spring 2019
- Editor & publication manager for Basso, Matthew, *The Way Utah Worked*, SLC, UT: Utah Humanities, 2017
- Editor & publication manager for Smoak, Gregory E., *Utah's Journey Stories*, SLC, UT: Utah Humanities, 2014
- Author, managing editor, & voice of *The Beehive Archive* history radio show broadcast weekly on KCPW Radio and Utah Public Radio, and [website](#), Salt Lake City, UT: Utah Humanities, 2010-present
- Editor & publication manager for Lee, E.J. with the Metropolitan Local Aboriginal Land Council, *The Tale of a Whale: Significant Aboriginal Landscapes of the Northern Beaches*, Dee Why, NSW: Warringah Council, 2002
- Co-author & publication manager for Perkins, M.J., *A Story to Tell... on a Road Toward Reconciliation*, Narrabeen, NSW: Aboriginal Support Group – Manly Warringah Pittwater, 2002
- Convener & Facilitator, *StEPs-UT Pilot* (2-year series of monthly workshops), Utah Humanities, SLC, UT (7/2018-6/2020)
- Convener & Instructor, *Museum Interpretation* (series of 5 day-long workshops on exhibition development), Utah Humanities, Provo, UT (9/2019-4/2020), Leeds, UT (2/2017-6/2017), SLC, UT (2/2016-6/2016)
- Moderator, *StEPs-UT: Building Relevance through Strong Institutions*, UMA Conference, Brigham City, UT (9/20/2019)
- Presenter, *Scaling Best Practices to Fit Your Museum*, UMA Conference, Brigham City, UT (9/19/2019)
- Instructor, *Introduction to Oral History* (half-day workshop), Utah Division of State History, Manila, UT (2/24/2018), SLC, UT (10/10/2017), St George (5/25/2017), SLC (9/29/2016), Cedar City (8/12/2016), Hyrum (2/18/2016), SLC (10/1/2015).
- Moderator, *Mission & Vision: A Way to Move Forward*, UMA Conference, Vernal, UT (10/11/2017).
- Presenter, *Advancing the Humanities through Strong Local History*, National Humanities Conference, SLC (11/12/2016).
- Convener & Instructor, *Collections Stewardship* (2-day workshop), UH, SLC (3/12-13/2015), Castle Dale (3/17-18/2015).
- Convener & Instructor, *Collections Care Detectives* (day-long workshop), Utah Humanities, Leeds (9/29/2014).
- Presenter, *Field Services Support Models for Small Museums*, Western Museums Association Conference (10/11/2013).
- Instructor, *Interpretive Exhibits: Telling Our Stories on a Shoestring* (day-long workshop), Western Museums Association Conference (10/9/2013), and American Association for State & Local History Conference (10/3/2012).
- Convener & Instructor, *Museum Interpretation Initiative* (series of 3 day-long workshops on exhibit development), Utah Humanities, Cedar City (2012), Heber (2012), Fairview (2011), Orem (2011), Moab (2010), Layton (2010).

ATTACHMENT 4 | WORK PLAN

Describe the steps that you will use during the period of performance to achieve each of the objectives proposed. Use a timeline that includes each activity and identifies responsible staff. Explain how outcomes from one activity will carry over into the next. For each activity, specify the project team members involved. For multi-institutional collaborative projects, discuss the distribution of responsibilities across each institution. As appropriate, identify meaningful support and collaboration with key stakeholders in planning, designing, and implementing all activities.

UTAH COMMUNITY PRESERVATION PROGRAM (UCPP) | WORK PLAN**YEAR I | Planning Phase (March to December 2021)****March-April 2021**

- Hire a professional conservator (henceforth known as the Preservation Outreach Coordinator) to spearhead curriculum development and oversee implementation of the UCPP for Years II and III. The Preservation Outreach Coordinator will be selected by the Utah Field Services Team.
- Collaborative alliance outreach with the cultural community, particularly partner agencies Utah Archives, Utah Divisions of Indian Affairs, State History, and Multicultural Affairs, Utah Museums Association, Utah State Library.
- Commence evaluation plan (front-end).

April-December 2021

- Refine Workshop curriculum for both online and in-person regional formats.
- Refine Utah Preservation Assessment tool.
- Coordinator attends site visits to familiarize her/himself with needs of Utah organizations.
- Application rollout and recruitment for the Collections Preservation Team (CPT). Cohort chosen by Summer 2021, with contracting and orientation by Fall 2021.
- CPT orientation workshop in Fall 2021 (likely at the Utah Museums Association conference).
- Commencement of individual site visits and preservation assessments at CPT institutions, conducted by the Preservation Outreach Coordinator and Utah Field Services team.
- Advertisement of online and regional workshops.
- Promote training opportunities at UMA and other professional conferences (half-day workshop for conference attendees, advertising of online and regional workshops).

YEAR II | First Year Teaching (January to December 2022)**Jan-December 2022**

- Rollout 12 monthly online workshops (2 hours each)
- Commence 4 quarterly two-part trainings in Region 1 (Wasatch Back / Uintah Basin)
 - 1 a&b) January/February 2022
 - 2 a&b) April/May 2022
 - 3 a&b) July/August 2022
 - 4 a&b) October/November 2022
- CPT cohort attends workshops as possible, with travel assistance to in-person regional workshops, with the possibility of making up any missed sessions in Year III.

Jan-Mar 2022

- Completion of individual site visits and preservation assessments at CPT institutions, conducted by the Preservation Outreach Coordinator and Utah Field Services team.
- The Utah Preservation Assessment used to guide additional hands-on learning for CPT onsite projects during this period.
- CPT Mid-term Meeting in central location (TBD depending on makeup of cohort).

April-September 2022

- CPT identify, plan, and commence onsite mentored projects.
- CPT meeting at the Utah Museums Association conference
- Closeout at UMA Conference with Report of participant experiences, training workshop, and kickoff with advertising opportunities for Year III in Region 2.

October-December 2022

- Site visits and hands-on work with the second half of the Community Preservation team.
- CPT cohort continues working on onsite mentored projects.
- Preparations to roll out online and regional workshops in Region 2 for upcoming Year III.

YEAR III | Second Year Teaching (January to December 2023)**Jan-December 2023**

- Rollout 12 monthly online workshops (2 hours each)
- Commence 4 quarterly two-part trainings in Region 2 (Eastern/Southeastern Utah)
 - 1 a&b) January/February 2023
 - 2 a&b) April/May 2023
 - 3 a&b) July/August 2023
 - 4 a&b) October/November 2023
- CPT cohort attends workshops as needed to make up for any missed sessions in Year II, with travel assistance available to in-person regional workshops.

Jan-Mar 2023

- CPT cohort continues working on mentored projects.
- CPT Mid-term Meeting in central location (TBD depending on makeup of cohort).

April-September 2023

- CPT cohort continues working on mentored projects, with wrap up by September 2023.
- Closeout at UMA Conference with Report of participant experiences, training workshop.

October-December 2023

- CPT members each conduct a Preservation Assessment on another organization as part of certification requirements. Reports provided to organizations in time to apply to the March UDAM grant cycle.

WRAP UP | January to February 2024

- Close out mentored CTP projects
- CPT wrap up meeting, final assessments, and award certificates
- Evaluation (back-end)

UCCP | PROPOSED CALENDAR OF ACTIVITIES

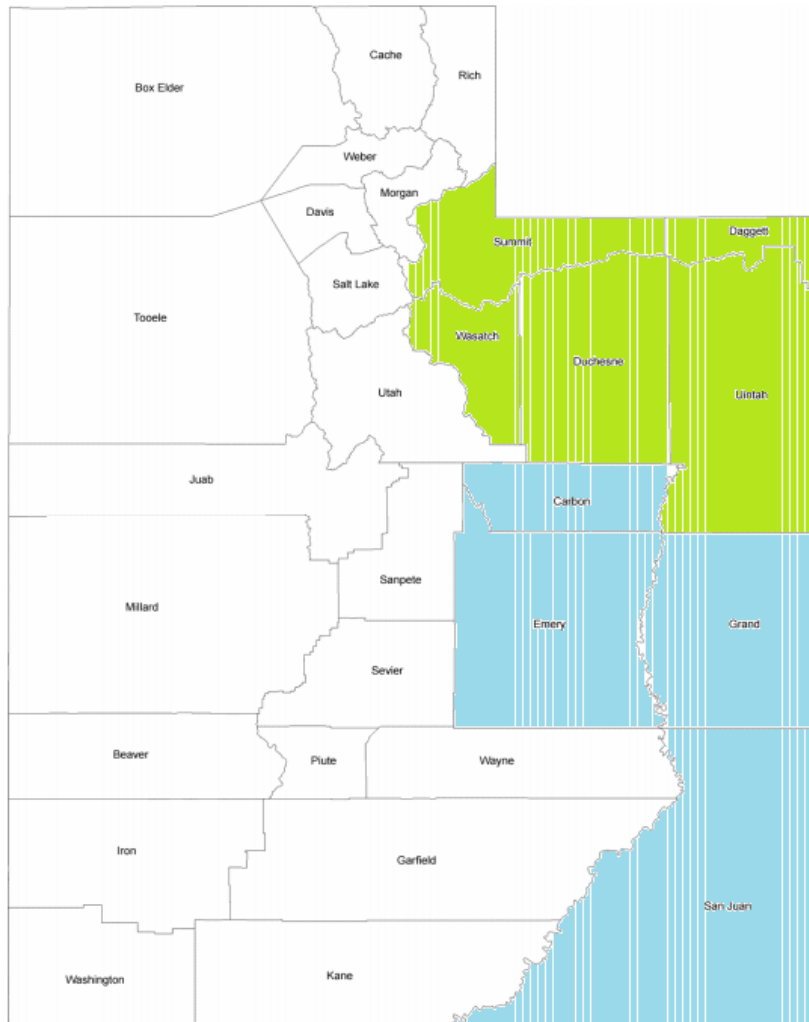
YEAR I PLANNING PHASE | **YEAR II TEACHING** | **YEAR III TEACHING** | **WRAP UP**

	ADMINISTRATIVE	Online Workshops	Regional In-person Workshops	CPT Advanced Cohort Training
Mar 2021	Recruit Conservator	Develop Curriculum	Develop Curriculum	Develop Curriculum
Apr 2021	Hire Conservator	Plan logistics	Secure local workshop hosts & plan logistics	Secure interim meeting locations & logistics
May 2021	Partner outreach & collaboration	Advertise	Advertise & recruit participants	Post application and advertise
June 2021	Evaluation (front-end)			Select cohort
July 2021	Create website			
Aug 2021				
Sept 2021	Workshop @ UMA			Orient @ UMA
Oct 2021	Planning & logistics			Site visits & preservation assessments for 7 participants start
Nov 2021	Advertise			
Dec 2021				
Jan 2022	Planning & logistics	Webinar 1	Region 1 Workshop 1A	Finish site visits Attend workshops
Feb 2022	Partner outreach & collaboration	Webinar 2	Region 1 Workshop 1B	
Mar 2022	Advertise	Webinar 3		Mid-term Meeting
Apr 2022	Maintain website	Webinar 4	Region 1 Workshop 2A	Continue to attend workshops
May 2022		Webinar 5	Region 1 Workshop 2B	Onsite mentored project planning
June 2022		Webinar 6		Commencement of onsite projects
July 2022		Webinar 7	Region 1 Workshop 3A	

Aug 2022		Webinar 8	Region 1 Workshop 3B	
Sept 2022	Workshop @ UMA	Webinar 9		Meet @ UMA
Oct 2022	Planning & logistics	Webinar 10	Region 1 Workshop 4A	Continue to attend workshops
Nov 2022	Advertise	Webinar 11	Region 1 Workshop 4B	Onsite mentored projects continued
Dec 2022		Webinar 12		
Jan 2023	Planning & logistics	Webinar 1	Region 2 Workshop 1A	Attend makeup workshops as needed
Feb 2023	Partner outreach & collaboration	Webinar 2	Region 2 Workshop 1B	
Mar 2023	Advertise	Webinar 3		Mid-term Meeting
Apr 2023	Maintain website	Webinar 4	Region 2 Workshop 2A	Attend makeup workshops as needed Onsite mentored projects continued
May 2023	Mid-term evaluation	Webinar 5	Region 2 Workshop 2B	
June 2023		Webinar 6		
July 2023		Webinar 7	Region 2 Workshop 3A	
Aug 2023		Webinar 8	Region 2 Workshop 3B	Close out projects
Sept 2023	Workshop @ UMA	Webinar 9		Meet @ UMA
Oct 2023	Reporting out	Webinar 10	Region 2 Workshop 4A	Preservation assessments at 7 orgs conducted by CPT individuals
Nov 2023	Sustainability planning	Webinar 11	Region 2 Workshop 4B	
Dec 2023		Webinar 12		
Jan 2024	Evaluation (back-end)			Wrap-Up Meeting
Feb 2024	Sustainability planning			Award Certificates

UTAH RURAL REGIONS SERVED WITH IN-PERSON WORKSHOPS IN YEARS II & III

This map does not represent participants who may travel from other counties to attend in-person regional workshops, nor online workshop engagement. These regions were chosen because they are typically underserved by Wasatch Front, I-15 corridor-oriented programming. Also, each region has one or more Tribal Reservations encompassed within its geography.



YEAR II | Region 1 = Wasatch Back & Uintah Basin

Uintah, Duchesne, Wasatch, Summit Counties, with possible draws from Carbon, Morgan, and Daggett Counties.

Possible workshop locations:
Vernal, Roosevelt, Duchesne, Heber, Fort Duchesne.

Possible participants: UCHM, Field House, Vernal DUP, Pope, Ute Tribe, Myton, Wasatch DUP, Alf Engen, Park City, Vernal History Center, libraries in Vernal, Roosevelt, Duchesne, Heber, Park City.

YEAR III | Region 2 = Central & Southeast Utah

Carbon, Emery, Grand, San Juan Counties, with possible draws from Wayne and Garfield Counties.

Possible workshop locations:
Helper/Price, Castle Dale, Green River, Moab, Blanding, Monticello, Bluff, Monument Valley.

Possible participants: WMRRM, Bryner, MSR, JWPRHM, Moab, Anasazi, EOC, Emery Archive, East Carbon, Canyon Country Discovery Center, White Mesa Ute Tribe, Navajo Tribe, libraries, etc.

Participants from all corners of the state are welcome to attend regional workshops and will be eligible for travel scholarships to attend.

Also, half-day in-person workshops will be offered at professional conferences (museum, library, etc.) to reach additional personnel with relevant training and to tease/promote the UCCP.

ATTACHMENT 5 | LETTERS OF COMMITMENT & SUPPORT

If your project involves a partner or service providers, provide letters of commitment. Letters of support are not required, but are highly recommended. They should address the project's significance and the program's review criteria, and should be written by experts in the project's subject area. Authors of letters of support will not participate in the NEH review process. Elected government officials and current members of NEH'S National Council on the Humanities may not serve as authors of letters of support. Name the file letters.pdf.

- GRAHAM, Jodi | Executive Director, Utah Humanities
 - Author of letter of institutional commitment from key partner organization
- HAYNIE, Robyn | Conservator, Colorado Springs Fine Arts Center, Colorado College
 - Author of letter of support from former preservation services contractor for Utah Field Services



UTAHHUMANITIES

Phone 801.359.9670
202 West 300 North
Salt Lake City, UT 84103-1108
www.utahhumanities.org

June 3, 2020

Victoria Panella Bourns
Director, Utah Division of Arts & Museums
617 East South Temple, Salt Lake City, UT 84102

Dear Ms. Bourns,

On behalf of Utah Humanities (UH), I am pleased to confirm our commitment to partner with the Utah Division of Arts & Museums' Office of Museum Services (UA&M OMS) in the proposed Utah Community Preservation Program (UCPP) during 2021-2024.

Utah Humanities' mission is to empower Utahns to improve their communities through active engagement in the humanities. We encourage residents to explore, preserve, and share their unique local history and material culture, and focus our efforts on activities that help strengthen Utah's cultural sector. We offer training, funding, and mentorship opportunities in history research, interpretation techniques, exhibition management, collection stewardship, grant-writing, and overall organizational best practices.

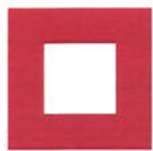
As you know, this capacity-building work occurs in a challenging environment. Utah's 250+ museums (mostly small, volunteer-run) face access and turnover issues that pose real dangers to their collections. Without a state history museum, these distributed collections comprise the core of Utah's cultural legacy. Utah's tiny cadre of professional conservators work in larger institutions and access to their expertise is necessarily *ad hoc*. I am delighted that our Center for Community Heritage staff and your OMS staff collaborate so closely in their field services work. Their challenge is to deliver basic training throughout this large state, actively mentor onsite projects, and expand services to underserved areas and to other types of collecting organizations (e.g., archives, historical societies, and tribes). Our joint staff continues to work with multiple state-level partners to better coordinate field services in the state, but the UCPP proposal to hire a dedicated conservator to spearhead this work, deliver a more consistent calendar of preservation education, and train a group preservation stewards around the state will significantly strengthen and broaden these efforts.

As partners for the UCPP, we would contribute staff time to administer this field services work, including travel and logistical support as needed. We would employ our relationships in-state to draw new partners and audiences to these new preservation services, including the identification and recruitment of in-state specialist instructors as needed. UH would also cover its personnel and travel costs as a cost share.

We are pleased to support the UCPP proposal because it would help further our mission of building capacity in Utah's heritage organizations. As ever, we look forward to working with you and your staff.

Sincerely,

Jodi Graham
Executive Director, Utah Humanities



COLORADO SPRINGS
Fine Arts Center
at COLORADO COLLEGE

(719) 634-5551
30 W. Dale St., Colorado Springs, CO 80903

To the NEH Division of Preservation and Access,

I am writing to offer my enthusiastic support for the *Utah Community Preservation Program* proposed by Utah Field Services. I am a museum conservation professional with 10 years of experience in objects conservation and collections management. From 2012-2019 I worked as Conservator at the Utah Museum of Fine Arts, an institution that is frequently consulted by regional organizations for advice on collections care, due to both its size and its remit as the state art museum. During my time as one of a small number of formally trained conservators in the state of Utah and through professional interactions including conservation consultation and loans, it became apparent to me that there is a pressing need for collections care and preservation education across many of Utah's regional institutions.

From 2015-2019 I had the opportunity to work periodically with Utah Humanities and the Utah Division of Arts and Museums to help create and deliver a variety of trainings surrounding collections care and preservation for Utah institutions. In spite of the clear interest and dedication of staff and volunteers from organizations across the state, the limited time available for these trainings was not sufficient to deliver the large body of content we hoped to cover in these trainings or to satisfy all participant training requests. It was inspiring to see the growth of these museum stewards over time and to watch them complete collections care projects and initiatives at their museums. However, there remains a very clear and urgent need for more targeted and comprehensive preservation and collections care training for Utah institutions.

Utah Field Services has done extensive testing and research to understand what type of training is needed in this area and how to deliver that content. In short, their proposed series of workshops is designed to meet this need of Utah's museums and cultural community. The addition of a full-time, dedicated Preservation Outreach Coordinator would provide much-needed consistent, available expertise for teaching and consultation. Additionally, the Community Preservation Team will further build this capacity across areas of Utah where currently none exists. Utah Field Services has already built the network required to implement this work and developed a solid framework for carrying out the educational and outreach mission of their proposed program. Expanding their capacity through the proposed grant is the most efficient and effective possible way to facilitate the preservation of the unique cultural heritage material held in Utah.

Sincerely,

Robyn Haynie
Conservator & Registrar
719-477-4384; rhaynie@coloradocollege.edu

ATTACHMENT 7 | ADDITIONAL SUPPORTING DOCUMENTATION

Applicants may include other relevant documents to support the application. Documentation may not exceed 40 pages. Merge all relevant materials into a single document and name the file documentation.pdf.

A) PROFILE OF APPLICANT

APPLICANT | Utah Division of Arts & Museums (UA&M), is a state coordinator and advisor on topics of importance to arts and museums communities. The Office of Museum Services is focused on improving the capacity and skills of the state's museum professionals to better care for their collections and serve their communities. We are a division of the Department of Heritage and Arts (DHA) within Utah state government, and the primary agency in Utah that distributes state and federal funds to stimulate and encourage growth in the creative industries. Our mission is to advance Utahns' quality of life through arts and museum experiences and cultural opportunities.

PARTNER | Utah Humanities (UH) is an independent non-profit established in 1975. With a small, dedicated staff and volunteer board of directors, UH offers public humanities programs across the state that involve thousands of people and organizations. To do this work, UH partners with organizations that want to improve their communities through the humanities. These partnerships span Utah and focus on heritage, literature, education, conversations, and local initiatives. UH's mission is to empower Utahns to improve their communities through active engagement in the humanities. Its Center for Community Heritage is charged with encouraging Utahns to explore, preserve, and share their unique local history, culture, and traditions. UH has a well-established record of delivering the type of field services described in this proposal.

COLLABORATION | Utah Field Services (UFS) is a partnership between the Utah Division of Arts & Museums' Office of Museum Services and Utah Humanities' Center for Community Heritage. Separately and together, these agencies support statewide efforts to preserve and improve access to humanities collections by offering support and technical assistance to Utah's 250+ museums and collecting institutions, including grant funding, training, onsite assessments, and mentored project assistance in a wide range of museum operations, preservation, and interpretation topics. This team strives to build capacity for collecting institutions, in-state field service delivery, and a well-networked community of practice. A snapshot of training delivered for Utah's museums in recent years below shows that the field services team is well-prepared to roll out the proposed UCPP project:

2020-2021 | **Breaking Barriers Program** | Utah Division of Arts & Museums and Art Access | Workshops to provide disability accessibility training, on-site consultation and mentorship to Utah cultural institutions. Content focused on accessibility best practices and development of individual accessibility plans for the cohort.

2019-2020 | **Regional Heritage Stewardship Program – Intermountain West Project** | Conservation Center for Art & Historic Artifacts in partnership with Utah Division of Arts & Museums and Utah Humanities | Project brings in-person workshops and webinars to collecting institutions in under-served parts of Utah and neighboring states.

2018-2019 | **Social Impact Pilot** | Utah Division of Arts & Museums and Thanksgiving Point | Pilot study with eight institutions to determine what social impact the state's museums have on the communities they serve. The goal of the study is to develop a tool that measures how attending Utah's museums can improve family and personal well-being, health, relationships, empathy toward others, knowledge, and understanding of one's community and others in it.

2018-2020 | **StEPs-UT Pilot Cohort** | Utah Humanities, Utah Division of Arts & Museums, Utah Division of State History | This 2-year project facilitates a community of practice among seven small museums in Utah to tackle standards across six areas of institutional practice, based on the AASLH Standards of Excellence Program for History Organizations. Program has included extensive curriculum development, monthly trainings, and mentored on-site projects.

2016-2021 | **Museum Interpretation Workshops** | Utah Humanities | Linked series of 5 day-long trainings on how to research, design, and create interpretive exhibits and educational activities. Participants complete their own exhibit project with interim assignments and mentoring from instructors. Cohort of 5-9 organizations participate each round.

2016-2018 | **Volunteer Management Workshops** | Utah Division of Arts & Museums and Utah Commission on Service & Volunteers | Two-part workshop series provides training to museum personnel on effective volunteer management and recruiting.

2016-2017 | **Collections Technical Assistance Program** | Utah Division of Arts & Museums | In-depth project to assist 4 small museums in improving their collections care and management practices through one-on-one training and mentored on-site projects, coupled with preservation assessments and project-specific grant funding.

2015-2020 | **Museum Skills Labs & By-Request Trainings** | Utah Division of Arts & Museums | The Office of Museum Services maintains materials and curricula for a variety of workshops and trainings, which are deployed at the request of Utah's museum community.

2015-2020 | **Onsite Preservation Assessments** | Utah Division of Arts & Museums | On-site preservation assessments provided on request by trained Museum Services staff. Museums often use their assessments to drive grant request narratives and prioritized preservation projects.

2014-2016 | **Collections Stewardship Workshops & Mentored Projects** | Utah Humanities | Series of 2-day workshops and mentored projects focused on the stewardship of collections in Utah's small museums to assist them to sustain heritage collections through a curriculum based on national best practice, hands-on learning at their own sites. Three series of workshops occurred in this timeframe, as well as six on-site mentored collections projects.

2013-2020 | **Oral History Workshops** | Utah Humanities and Utah Division of State History | These half-day workshops introduce the discipline of oral history and the nuts and bolts of executing a successful oral history project, including funding sources and best practices.

2010-2020 | **Exhibition Loan Show Host Training** | Utah Humanities and Smithsonian Traveling Exhibition Service | Linked series of 3 day-long trainings, along with individual mentoring, on how to host a Museum on Main Street traveling exhibition, including logistics, community relations, publicity, evaluation, docent training, and creation of public programming. This mentored training spans 2-3 years and is delivered to a cohort of 5-6 museums each cycle.

2010-2013 | **Museum Interpretation Initiative Pilot** | Utah Humanities and Utah Museums Association | IMLS-funded series of trainings on how to create interpretive exhibits. Fifty museums completed their own exhibit project with mentoring from instructors.

B) SCOPE OF EVALUATION WORK

Evaluator Kari Ross Nelson will employ aspects of implementation and outcome evaluations to measure the success of the UCPP.

Implementation Evaluation

Patton (2011) describes implementation evaluation as follows:

Implementation evaluation focuses on finding out if the program has all its parts, if they are functional, and if the program is operating as it's supposed to be operating. ...This involves finding out what actually happens in a program. What are its key characteristics? Who is participating? What does staff do? What do participants experience? What's being implemented as planned and what is not? Answering such questions is essential because implementation problems are a common cause of program failure.

This aspect of the evaluation will include:

- Determining a timeline of benchmarks and assignments.
- Check-ins with administrators at regular intervals to document accomplishment of benchmarks.
- Use findings to evaluate how the intended plan is working and what needs to be adjusted for a viable model.

Outcome Evaluation

IMLS defines outcomes as benefits to people: specifically, achievements or changes in skill, knowledge, attitude, behavior, condition, or life status for program participants. Any project intended to create these kinds of benefits has outcome goals. Outcome-based evaluation, "OBE," is the measurement of results. It identifies observations that can credibly demonstrate change or desirable conditions. It systematically collects information about these indicators, and uses that information to show the extent to which a program achieved its goals.

This aspect of the evaluation will take place in three phases:

- Front-end
 - Survey potential participants to understand what they perceive to be most needful; the current state of their collections and storage of them; accessible delivery methods; their available time and resources.
 - Clarification of program goals with administrators.
 - Articulation of how evaluation results will be used.
- Formative
 - Surveys to participants in early training - both Community Preservation Team and museum staff/volunteers - to understand the quality, clarity, and relevance of curriculum.
- Summative
 - Interviews with administrators and Fellow
 - Interviews with CPT members
 - Surveys to participants in later trainings

The activities outlined above, along with data analysis and reporting will require approximately 150 hours over the course of the three-year project. At a rate of \$~~50.00~~ per hour, evaluation services for this project are estimated at \$(b) (6).

References

- Patton, M. Q. (2011). *Essentials of utilization-focused evaluation*. Sage.
- Institute of Museum and Library Services. *Outcome Based Evaluation Basics*.
<https://www.imls.gov/grants/outcome-based-evaluation/basics> Retrieved June 1, 2020.

C) EXISTING COURSE OUTLINES & MATERIALS FOR ADAPTATION

Using existing curricular resources -- adapting, augmenting and reorganizing as needed -- the UCPP will develop a core calendar of training that will cover the following areas:

- Preservation needs assessment
- Preventive preservation best practices
- Object handling and housing
- Environment and housekeeping (including integrated pest management)
- Policies and procedures
- Preservation planning
- Preservation and access strategies for a range of object types (digital media, archival, 2D and 3D objects, textiles, artwork, etc.).
- Ethical, legal, and culturally appropriate collection practices (e.g., managing material from under-represented communities, restricted/sacred material, community stewardship, etc.)
- Risk assessment and disaster preparedness and response
- Collection advocacy and fundraising

Utah Field Services has a deep well of source material, including the following (detailed in the pages below):

- 2014 | Utah Preservation Assessment Tool (11-part systematic review based on Heritage Preservation's Preservation Assessment markers) = *8 pages*
- 2015 | Collections Stewardship Workshop Curriculum Outline = *7 pages*
- 2016 | Collections Technical Assistance Program Description (curriculum for each project varied per institutional needs) = *1 page*
- 2019 | StEPs-UT Stewardship of Collections Module Curriculum = *17 pages*



Utah Division of **Arts & Museums**

Onsite Assessment

Date: _____

Name of Museum: _____

Facilitators: _____

General Building/Facilities

Exterior Building

1. Are windows and doors operable? Y N

2. Is the roof /gutters stable? Y N

Interior Building

1. What is the condition of the interior spaces?

2. Are there leaks? Y N

3. Evidence of insects, rodents, or mold? Y N

4. Are hazardous materials and equipment stored properly?

Temperature and Relative Humidity

1. What conditions are you trying to maintain? Are these year round conditions? What goals have you identified with regard to temperature and relative humidity control?

Structures with central HVAC (if you do not have central HVAC, please skip this section):

1. Describe the general nature of the HVAC system, its age and in general how well it operates.

2. Are all spaces in the museum on the HVAC system? Y N If not, are collections at risk in spaces not environmentally controlled? Y N

3. Is humidity control integrated in the HVAC system? Y N

4. How is the HVAC system controlled?

5. Are thermostats on a regular schedule? Y N

6. Is the system used year round, seasonally, or on an as-needed-basis?

7. Are windows or doors used to provide ventilation? Y N

For structures with no central HVAC (please refer to the section above should you have HVAC):

1. Describe the heating, cooling and other temperature and/or relative humidity control equipment used in the building and how well it operates.

2. What equipment, if any, is used?

3. Is the equipment maintained? Y N

4. Are windows or exterior doors used to ventilate your museum? Y N

5. Are environmental controls monitored? Y N

6. What areas are monitored?

7. Who is responsible for monitoring?

8. What types of monitoring equipment are used?

Illumination:

1. Describe the kinds of illumination used in exhibition or storage areas. Please be specific (daylight, florescent, incandescent, LED, etc):

2. What are the sources of natural light in galleries, exhibition and storage spaces and what objects does it illuminate?

3. Are there curtains, blinds or other light reduction materials used to reduce the intensity of light entering in the building? Describe:

4. Are there regular maintenance and inspection programs for florescent lighting to ensure ballast are functioning properly? Is UV film used on florescent lighting?

5. Are lights placed inside of exhibition cases? Y N

6. Are measures taken to reduce heat inside of cases that are internally lit? Y N

7. Can light intensity be controlled inside the museum? Y N

8. Does the museum have lighting policies based on materials sensitivity? Y N

9. Is lighting monitored? Y N What equipment is used and who does the monitoring? UV?

10. Have any objects noticeably faded or become damaged by exposure to light? Can the lighting be modified to better protect the collections?

Pest Control

1. Is there evidence of pest damage to the collections? Y N

2. Is there a history of pest problems?

3. Does the museum have pest monitoring in place? An IPM?

4. Does the museum isolate objects from the rest of the collection before bringing into the collection? Y N

5. Does the museum use pesticides? Does the museum use pesticides on any collections?

6. Are plants allowed in the building? Y N If yes, are the plants checked for pests prior to bringing them inside? Y N

7. Is food stored, prepared, or consumed in the building? Y N If yes, please detail:

8. What precautions are taken to clean the building of food and anything that would draw pests?

9. How often is housekeeping done in gallery spaces and/or storage?

Collections and Collections Policies

1. Describe the museum's collections and their general condition. Review procedures for handling and use of the collection. Are there any procedures that put collections at risk?

2. Does the museum condition report? Y N

Please check all that apply:

	Written Policy	Unwritten policy	No Policy
Collecting Plan			
Accession/Deaccession procedures			
Preservation plan			

Exhibitions

1. Describe current exhibitions. Are they long term or short term? Who plans them?

2. Are object in cases? Protected? Stantonioned?

3. Is the museum a historic house museum? Y N

4. For what purpose are exhibit cases accessed?

5. What are the cases constructed with? Do the materials from construction or from housing appear to be affecting the collections?

6. Are objects on display monitored for changes in condition? Who does this work?

7. Are objects on display secured? Y N

Storage

1. Describe the museum's storage conditions. What sort of cabinetry is used (metal, wood)?

-
-
2. What types of storage exist? Storage all in the same building? Y N If no, is there off-site or temporary storage? Y N Describe conditions in these areas:

 3. Where is permanent storage located in the building?

 4. Do objects have storage mounts? Y N Boxes? Y N Padded against hard surfaces or supported in any kind of way? Y N Describe:

 5. Security of storage: how many doors open into storage? _____ Which of these doors are used? _____ Are doors secured ? _____
 6. Do water, steam, drain, or fuel pipes run through storage? Describe:

 7. Are objects stored at least 6" above ground? Y N
 8. Are collections stored below grade? What sorts of precautions are taken to ensure flooding isn't an issue?

 9. How are collections organized? Within storage areas? Are they overcrowded? Describe:

 10. Do all objects have a formal, recorded location? Y N
 11. Does the museum need additional storage space? Are there spaces that can be used for storage not being used?

 12. Who has access to storage? Anyone not on staff?

 13. What are the policies for monitoring objects' movement in and out of storage?

 14. Are storage areas used for anything other than storage of collections?

Emergency Preparedness

1. Does the museum have an emergency preparedness plan? What types of emergencies does it cover?

2. Is the plan current? Y N
3. Who has copies of the plan? Please list:

4. Are there copies available to staff throughout your building? Are they readily accessible? _____

5. Do you host emergency preparedness drills? Y N Do staff and volunteers know what to do in the event of an emergency? Y N
6. Do you have emergency supplies available specific to collections? Where are they kept and are they inventoried?

7. Do local emergency responders (firefighters, police, emergency coordinators) have your plan, know where you are located, and have been on a facilities tour?

8. What sort of fire suppression system do you have?

9. Is anything blocking the first suppression system? Y N

Security and Safety

1. Within the last five years has there been any vandalism to the collections or building? Y N If yes, is there a plan to prevent and deal with the vandalism?

2. Does the museum have a security response plan in the event of a bomb/hostage/active shooter situation?

-
-
3. Does the museum have passive security for its collections such as locks on doors, exhibition cases and assigned keys to the building and storage?

-
-
4. Does the museum have active security measures for collections such as CCTV, perimeter alarms, guards or keycard entry systems?

-
-
5. Does staff perform regular security/safety inspections? If yes, how often?
-
-

WORKSHOP AGENDA - *Museum Collection Stewardship*

Learn basic museum collection management practices in this intensive two-day, hands-on workshop. Get guidance on collections care basics, including policies, documentation, cataloging, safe handling, storage and display. Understand the Collections / Conservation Performance Goals for Utah Museums.

DAY ONE

Tuesday, 17 March 2015, 9:00am – 5:00pm

Museum of the San Rafael, 70 North 100 East, Castle Dale, UT 84513, 435.381.3560

8:30–9:00 am	Arrivals so we can start promptly
9:00–9:45 am	Welcome (Megan van Frank and Everyone) <ul style="list-style-type: none"> • Thanks to host and housekeeping details • Introduce facilitators and participants • What do you hope to gain from the workshop? (1-2 minutes each)
9:45–10:15 am	Introduction to Collections Stewardship (Megan) <ul style="list-style-type: none"> • Workshop structure, content, goals • Utah's Performance Goals for Museums (Jennifer Ortiz) • Resources at hand: binders, materials, and people in the room
10:15–10:30 am	BREAK
10:30–12:00 pm	Collections Policy (Megan) <ul style="list-style-type: none"> • Purpose, elements, development process • Scenarios and group discussion
12:00 –1:00 pm	LUNCH on your own
1:00–2:45 pm	Collections Procedure (Glenna Nielsen-Grimm) <ul style="list-style-type: none"> • Management workflow (accessions, cataloguing, condition reporting, inventory, etc.) • Record-keeping systems
2:45–3:00 pm	BREAK
3:00–3:30 pm	Project Planning Case Study: Utah Division of State History (Doug Misner & Michele Elnicky) <ul style="list-style-type: none"> • Planning & implementing a multi-phase inventory project
3:30–4:30 pm	Visit to Emery County Pioneer Museum <ul style="list-style-type: none"> • Discussion in the gallery of lessons from the day
4:30–5:00 pm	Wrap-up (Megan and Everyone) <ul style="list-style-type: none"> • Questions? Comments? Plans for next day?

DAY TWO

Wednesday, 18 March 2015, 9:00am – 5:00pm

Museum of the San Rafael, 70 North 100 East, Castle Dale, UT 84513, 435.381.3560

8:30–9:00 am	Arrivals so we can start promptly
9:00–9:15 am	Welcome (Megan van Frank and Everyone) <ul style="list-style-type: none">• Thanks to host and housekeeping details• Quick recap of previous day
9:15–10:45 am	Collections Environment (Robyn Haynie) <ul style="list-style-type: none">• Material Types & Agents of Deterioration• Environmental Monitoring Kit (Jennifer Ortiz)• Safe Display & Storage
10:45–11:00 am	BREAK
11:00–12:00 pm	Collections Environment – Gallery Exercise (Robyn and Everyone) <ul style="list-style-type: none">• Introduction to Tools for Hands-On Exercise• In small groups, identify dangers lurking in the San Rafael Museum• Small groups report out on findings• Group discussion on how to address the problems we found
12:00 –1:00 pm	LUNCH on your own
1:00 –2:30 pm	Collections Handling (Glenna Nielsen-Grimm) <ul style="list-style-type: none">• Handling Techniques• Archival Materials Grab Bags
2:30–2:45 pm	BREAK
2:45–3:45 pm	Hands-On Projects – Shift 1 <ul style="list-style-type: none">• Participants break into two small groups for the afternoon• Each group works on a project at one of the two work stations• Break as needed
3:45–4:45 pm	Hands-On Projects – Shift 2 <ul style="list-style-type: none">• With your group, move to the next station• Break as needed
4:45–5:00 pm	Wrap-up (Megan and Everyone) <ul style="list-style-type: none">• Questions? Comments?• Opportunity to apply for mentored collection project at your museum• Evaluation

Utah Humanities heritage workshops aim to strengthen the fabric of Utah's collective heritage by supporting the museums and cultural organizations that are, in large part, responsible for sustaining it. The collections stewardship workshops are delivered in partnership with the Natural History Museum of Utah, Utah Museum of Fine Arts, Utah Division of State History, and Museum of the San Rafael, and are generously supported by the Utah Division of Arts & Museums, with funding from the State of Utah.

COLLECTION STEWARDSHIP WORKSHOP OUTLINE

DAY ONE

Collections Stewardship

- Introduction
- Standards

Collections Policy

- Purpose & Elements

Collections Procedure

- Management Workflow
- Record-keeping

Planning – Project Case Study

- USHS Collections Inventory
- Storage / Gallery Exercise

DAY TWO

Collections Environment

- Material Types
- Agents of Deterioration
- Safe Display & Storage
- Gallery Exercise

Collections Handling

- Handling Techniques
- Archival Materials

Hands-On Project Work

Wrap-Up

- Resources, Questions & Evaluation

DAY ONE

Museums & Public Trust

- Requires museums to acquire, document and preserve collections in accordance with institutional policies, to be accountable for them, and to pass them on to future generations of the public in good condition.
- Collections used for the exclusive purposes of preservation, research, education, and presentation to the public.
- Museums do not technically own their collections, but care for them on behalf of public they serve. In exchange, museums are granted certain benefits – like non-profit status with tax exemptions and eligibility for federal, state, local grants.
- Collections are heart of the museum and proper care and management is heart of stewardship.
- Museums & Public Trust
- Almost every museum lists collecting and preserving as the top two activities in their mission statement
- Are these activities listed in your mission?
- Over 4.8 billion artifacts are held in public trust by more than 30,000 collecting institutions in the U.S.
- 59% of these museums and libraries do not have adequate storage
- 80% of these do not have paid staff dedicated to collections care

YET

- We do not list COLLECTIONS as assets.
- We do not use them as collateral for loans.
- We do not sell them to pay operating expenses.
- We are bound by our mission to care for them on behalf of the public.
- They cost us money and will never pay for themselves.
- When we accept a new object into the collection we are committing resources of time, money, materials and space to that “thing.”
- Standards for Collections Stewardship- *AAM Characteristics of Excellence in Plain Language*
 - Know what stuff you have
 - Know what stuff you need
 - Know where it is
 - Take good care of it
 - Make sure someone gets some good out of it.
 - Especially people you care about. And your neighbors.

Utah Performance Goals for Museums: Collection Management & Conservation

- a) Updated accession records will be kept with duplicates in secure, off-site location.

- b) Collection will be catalogued and photographed.
- c) A collections management policy will be developed and include a definition of the collection and policies regarding loans, donations, accession and de-accession processes, collections care standards.
- d) The museum is aware of the condition of the collection. Inventory is conducted on a regular basis depending on collection scope and detailed records are kept of each inventory. Condition survey completed during inventory.
- e) Museum will determine the importance and status of insurance on collections (i.e. objects on display, in storage, on loan to and from the museum, etc.
- f) Museum will maintain collection care standards:
 - Staff involved with collections will be trained in proper handling techniques.
 - Collections will be kept in a secure place.
 - Collections will be protected from detrimental effects of light, temperature change, humidity, pests, pollutants and human interaction.
 - Collections will be managed in accordance with state and federal laws, e.g., Native American Graves Protection & Repatriation Act (NAGPRA), Nazi looting, guidelines for display of human remains and religious relics.
 - Inventory will be conducted on a schedule.
 - Loans in the museum will have updated loan paperwork, signed by the lender on an annual basis. All found in collection items (FIC) and abandoned objects should be documented and kept separate from the permanent collection and processed should the museum pursue acquisition.

Resources for Collections

- Physical
- Virtual
- People

COLLECTIONS POLICY

- What is a Collections Policy?
- Do You Have a Collections Policy?
- Why Have a Collections Policy?
- Policies vs Procedures vs Plans
- Policies will differ by institution
- Collections and circumstances
- History, community, audiences, governance, traditions, institutional and community politics
- National and discipline-specific standards
- Elements of a Collections Policy
 - 1) Purpose of the museum / policy and statement of authority
 - 2) What the museum collects
 - 3) How and from whom the museum collects
 - 4) How the museum complies with legal and ethical obligations
 - 5) How it documents its acquisitions
 - 6) How it cares for the collection
 - 7) How it deals with removing objects from the collection
 - 8) What kind of loans it enters into
 - 9) How the collection and records are made accessible
 - 10) Who approves policy and frequency of review
- CASE studies for discussion
- Steps to Creating a Collections Policy
- Hands-On Policy Exercise

COLLECTIONS PROCEDURES

- Registration

- Types of Acquisitions
- Questions to consider:
 - Is the object in good condition?
 - Is it of exhibit quality, or useful for research, or educational purposes?
 - Can the museum properly care for and exhibit the object?
 - Will the acquisition of the object result in major expenses that the museum cannot afford?
 - Will it be a possible commercial endorsement?
 - Will the title be legal and valid?
 - Is it the object authentic?
 - IS IT FREE FROM RESTRICTIONS?
 - Does acquiring the object violate any state, national, or international laws?
- Acquiring clear title to an object
- Policy should determine when restrictions of any kind are acceptable.
- Abandoned property laws aid in the final determination of title.
- Accessioning
- Deaccessioning
- Loans
- Acquisition Process
- Accession Process

Documentation

- Donation Form
- Notary
- Temporary Custody Receipt
- Incoming Receipt
- Accession Procedure: Cataloging, worksheets, safe numbering, photography
- An object or specimen is cataloged by a physical process of entering associated data into a database system, archival card catalog or a ledger.
- Important that you maintain this organizational link to each object.
- The object is identified, described, photographed, condition assessed, and given a final location in the museum's storage and/or exhibit.
- Sample Catalog Card / Record
- Condition Report

Issues of Care

- Conservation Environment
 - ✓ Identify agents of deterioration
 - ✓ What you can do to control for these
- Object Care
 - ✓ Identify immediate agents of deterioration
 - ✓ Condition of the object
 - ✓ Storage, handling, stability
 - ✓ Inventory
- Record-Keeping Systems

COLLECTION PLANNING: PROJECT CASE STUDY: Utah State History: Artifact Inventory

- A multi-phase project with end goal being a complete content management system for institutional control, with an online component for greater public access.
- Phase I – Inventory
- Phase II – Stabilization
- Phase III – Reconciliation
- Phase IV – Artifact Appraisal

- Phase V – Implementation of Content Management System (CMS)
- Phase VI – Metadata Production and Digitization

Preparation Process – Theoretical vs Practical

- Let's Take a Tour!

DAY TWO

Collections Environment

- What is Collections Care?
- The range of activities that preserve cultural and natural heritage collections: collection management, environmental management, proper storage and handling practices, and monitoring.
- Collections care is also known as “preventive conservation.” Preventing damage easier than fixing.
- Agents of Deterioration & Mitigations
 - ✓ Physical Forces
 - ✓ Light
 - ✓ Pollutants
 - ✓ Pests
 - ✓ Incorrect Relative Humidity and Temperature
 - ✓ Water
 - ✓ Fire
 - ✓ Thieves and Vandals
 - ✓ Neglect

Material Types

- Organic Materials (were once alive) = Wood, plant fibers, bone, textiles (typically), works on paper, etc.
- Inorganic Materials = Metal, stone, glass, plastic, etc.
- Composite = Can be a combination of any of the above
- Different material types respond uniquely to the agents of deterioration

Museum Pests

- Integrated Pest Management

Monitoring Safe Display & Storage

- Proper tools for monitoring and mitigation
- Choose correct materials for exhibition and storage

COLLECTIONS HANDLING BASICS

- Moving Objects guidelines
- Prepare work spaces—clean, padded, sturdy, stabilizing devices
- Minimal and safe handling
- Procedures and training and controlled access
- Identify agents of deterioration and control for them

Archival Materials

- Grab Bags and discussion of the contents

Let's Do Some Hands-On Improvements!

- Survey museum environment using ENVIRONMENT & MATERIAL TYPE sheets – discuss findings
- Break into three small groups and rotate through project tables to practice skills

Project at YOUR Museum?

- Want to make start or progress a collections stewardship project at YOUR museum?
- Want some funding and on-site assistance to make it happen?
- Contact Megan van Frank @ Utah Humanities 801.359.9670 or vanfrank@utahhumanities.org

Museum Collections Stewardship

Utah Humanities Community Heritage Workshop Series

12-13 March 2015 – Salt Lake City, Utah & 17-18 March 2015 – Castle Dale, Utah

READINGS, TEMPLATES & VARIOUS RESOURCES BINDER

Section 1

Collections Policy

- MGNSW – Thinking About Collections Policies
- AASLH – Collections Management Policy Template
- ICOM Code of Ethics for Museums
- AAM Code of Ethics for Museums
-

Section 2

Collections Procedure & Documentation

- MAVIC – Collections Care Overview
- MGNSW – Acquisition Fact Sheet, Register Template, Deed of Gift Template
- MGNSW – Cataloguing Fact Sheet, Worksheet Template
- MAVIC – Numbering Objects Info Sheet
- Photo Scales
- MGNSW – Condition Report Essentials, How To Guide, and Template
- MGNSW – Loans Fact Sheet, Outward & Inward Loan Agreement Templates
- MGNSW – Thinking About Computer Cataloguing
- Collection Inventory Sheet
- MGNSW – Deaccessioning Fact Sheet, Flowchart

Section 3

Collections Environment

- MAVIC – Conservation Planning
- Agents of Deterioration: Enemies of Museum Objects
- Collections Care Assessment Summary, Worksheets (Environment and Materials)
- MAVIC – Lighting, Temperature & Humidity, Pollutants, and Monitoring
- Pest Identification Handout and Cards
- MGNSW – Storage and Display - Suitable and Unsuitable Materials
- ConservoGram - Safe Plastics and Fabrics for Exhibit and Storage

Section 4

Collections Handling & Support

- Handling Museum Objects
- Mounting Principles and Examples
- Packing Museum Objects: A Collections Care How To Guide
- ConservoGram - Packing
- ConservoGram - Basket Storage
- Matting and Hinging Instructions
- Donut Pillow Instructions
- Box and Tray Making Instructions

Section 5

Links & Other Resources

- Selected Collections Care Resources
- Basic Collections Care Toolkit
- Suppliers for Collection Storage & Exhibition Materials
- Glossary of Museum Terms
- Conservation Assessment (CAP) and Museum Assessment (MAP) Programs



The Division of Arts and Museums is pleased to announce a new program geared towards assisting small museums in improving their collections care and management practices. The Collections Technical Assistance Program will provide participating museums one-on-one training on-site in collections care, from object handling to inventory and preservation planning.

Participating museums will work directly with the UA&M Museum Specialist to conduct a Preservation Assessment and work on-site to determine priority projects that they can address together over the course of the year. Museums accepted into the program will receive \$4,000 to work on their collections project, funding that can be applied towards such things as purchasing materials, bringing in a conservator to do conservation work, or building improved exhibitions mounts. The goal of the Collections Technical Assistance Program is to holistically address collections care in small institutions by providing the building blocks of training and funding necessary for museums to succeed.

This program is by application only and will be limited to four total participating museums. Applications will be accepted through July 22nd with notifications of acceptance sent out August 19, 2016. All participating museums must be able to commit to a full year of working on their agreed upon project with the Museum Specialist in order to receive the funding.

Qualifications:

You must represent a “small” museum in the state of Utah, operating on \$250,000 or less. While academic institutions are welcome to apply, the main beneficiaries of the program must be full or part time staff and/or volunteers and not students working towards a degree who will continue to work in the museum. To apply, please [click here](#).

StEPs MODULE CURRICULUM GUIDE

Stewardship of Collections



Find complete agendas, presentation materials, hands-on activity prompts, and handouts at:

<https://artsandmuseums.utah.gov/steps-ut/>

StEPs

Standards and Excellence Program
for History Organizations

A Program of the American Association for State and Local History

Copyright © 2019 | Created as part of the StEPs-UT pilot project (2018-2020). StEPs-UT is a partnership between the Utah Division of Arts & Museums, Utah Humanities, and the Utah Division of State History that uses tools from the American Association for State & Local History and is made possible with funding from the State of Utah and the National Endowment for the Humanities | All rights reserved.

Special acknowledgement to the American Association for State & Local History StEPs program and the resources developed for this program.

Collections

A 2.25-day curriculum for use in the StEPs-UT pilot project

The Utah Division of Arts & Museums (UA&M), Utah Humanities (UH), and the Utah Division of State History (USH) are partnering to pilot a program based on the American Association for State & Local History (AASLH) Standards and Excellence Program ([StEPs](#)) that offers seven Utah history museums a two-year enrichment opportunity designed to help them achieve success in six areas of institutional practice. Monthly workshops held in Salt Lake City are taught by instructors who are experts in the designated area of focus. The program pairs participating organizations with an experienced mentor to help individualize content to the organization's current needs. The StEPs-UT pilot consists of 4-month modules, each of which includes hands-on workshops, an onsite project conducted by participant sites, and mentor support. The pilot runs from July 2018 and continues through June 2020.

Audience

- Workshops are for paid and unpaid staff of small- and mid-sized museums.
- Core participants are staff, board, and volunteers from seven small Utah museums participating in the two-year StEPs-UT pilot (2018-2020).
- Month 2 Mini-Workshop sessions are open to personnel from any Utah museum.

Module Outline

- **Month 1** | Full-day, 8-hour workshop giving an overview of the StEPs module standards, with deeper dives into 1 or 2 topics. Any module assignments are given by instructors at this time.
- **Month 2** | Quarter-day, 2-hour mini-workshop executed as part of the UA&M Office of Museum Services regular Watch & Talk or Skills Lab series open to Utah museum personnel. This session gives a deeper dive into a single related topic with broad appeal to Utah museums. This session serves as advertising for StEPs-UT to the Utah museum community.
- **Month 3** | Mentor site visits to check on local projects, **no workshop content needed**.
- **Month 4** | Full-day, 8-hour workshop is a deeper dive into 1-2 topics and wraps up module.

Module Personnel - COLL

- Curriculum Developers and Lead Instructors: Glenna Nielsen Grimm (Collections Manager, Natural History Museum, Utah) and Robyn Haynie (Assistant Director of Collections & Exhibitions, Conservator, Utah Museum of Fine Arts). Both are working as independent consultants.
- **Guest Instructors: *Note that guest instructors can be paid if necessary, secured by separate contract, and must be approved by admin prior to any approach.***
- Month 2 Mini-Workshop Series Coordinator: Emily Johnson (Museum Specialist, UA&M)
- StEPs-UT Pilot Administrators: Jennifer Ortiz (Museum Services Manager, UA&M) and Megan van Frank (Director, Center for Community Heritage, Utah Humanities)

Evaluation

The pilot evaluation plan developed by Kari Ross Nelson (Consultant) consists of written feedback from instructors and mentors, as well as mentor reports on the progress of their sites through each module. Pilot sites complete before and after self-assessments of their progress through the standards. Part of Month 4

Workshop is devoted to a group discussion about their progress through the module. Mid-pilot interviews will also take place.

Standard Curriculum Materials

A primary goal of the StEPs-UT program is to develop curriculum that will have a life beyond the pilot. The learning experience must be as replicable as possible beyond the current delivery team. This means that module materials must strike a balance between written content and verbal presentation, and that instructions and information sources are clearly documented. All materials will be produced with a consistent style and branding.

In order to standardize the curriculum, each module will consist of the following:

- Module Curriculum Guide (this document)
 - This guide will start as a preliminary outline covering all three workshops and **be progressively fleshed out and completed by instructors** as content is developed and refined.
 - This is the place to detail content and instructions, store slide notes, note specific material needs, and record source references, etc.
- Workshop Materials for Months 1, 2, and 4
 - Agenda for the day
 - PowerPoint Slide Presentation
 - Hands-on Activity Instruction Sheets
 - Other Handouts if needed

Curriculum Development Schedule - COLL

The entire module curriculum should be largely developed prior to the rollout of the Month 1 workshop. Minor adjustments in response to changing circumstances or needs that arise may occur if necessary. But the aim is to have the module's framework and expectations set well in advance so that mentors and administrators can adequately plan.

Curriculum is developed by Lead Instructors with help and oversight from admin staff on this schedule. Note that original contract dates have been revised due to other instructor commitments - revised dates should be checked and agreed by all parties:

- 1) At least 16 weeks ahead of module start date = module curriculum meeting between instructors and StEPs-UT administrative staff based on the preliminary version of this document. This conversation will orient instructors to the shared google drive and resources available, discuss deliverables and working arrangements, and cover overall content emphasis and particular highlights covered in the module. **[original date = 4/8/2019; revised date = 1/31/2019]**
- 2) At least 8 weeks ahead of start date = instructors provide to admins a draft module curriculum (i.e., this document fleshed out with a detailed outline of content, decisions about teaching resources used, suggested guest instructors (if desired), homework assignments, need for sites to bring materials to sessions, etc.). Drafts of agendas, activities, delivery notes, etc. are welcome. **[Original date = 6/3/2019; revised date = 4/4/2019]**
- 3) At least 6 weeks ahead of start date (if not before) = in person meeting between instructors and admins to discuss outline and proposed particulars. The aim of this meeting is to provide feedback on drafts and any specifics about moving ahead with final materials. **[original date = 6/17/2019; revised date = 4/26/2019 from 2-4pm]**
- 4) At least 2 weeks ahead of start date = based on review meeting, instructors deliver penultimate version of final materials. These include a finalized outline, PPTs with delivery notes, agendas, hands-

on activity /sheets, handouts, etc. [original date = 7/15/2019; revised date = 7/1/2019 NOW IS 6/26/2019 (as of 4/26 EAJ)]

- 5) Deadline for final questions and feedback from admin to instructors on slides and handouts before moving into production [original date = 7/12/2019; revised date = 7/10/2019].
- 6) Admin checks agendas, PPTs, hands-on activities, handouts against outline for consistency and workability, as well as brand/format them and ask any final questions prior to rollout on 7/29/2019. Depending on what lingering issues may be, one or more conversations and material checks may be required in this window between 6/17 and 7/29. Admin will provide final formatted materials to instructors for last eyes and approval before printing.

Learning Styles

The curriculum should be designed in a way that meets adult learning styles. Typically, adults like to have some control over the learning process. Research shows that **adults remember only 10% of what they read and 50% of what they see and hear. But they retain around 70% of what they say themselves and about 90% of what they do.** Therefore, sessions should be structured in a way that gives participants opportunity to comment, share experiences, ask questions, and when possible, engage in activities where they are doing hands-on tasks that relate to the topic.

Individual participants will have a **variety of learning styles** so it's important to present information via several modes, utilizing visuals, discussion, and hands-on activities.

- Visual Learners benefit from overheads, handouts, graphics, websites, and readings. Visual learners need to see what is happening and who is talking.
- Oral Learners need to hear discussion and express their questions, thoughts, and conclusions out loud.
- Kinesthetic Learners prefer actively interacting with people and objects to support their learning.

Culture of the Room

The StEPs-UT pilot sessions should be a place where participants are encouraged to share in a safe and confidential environment. Participation by museum staff, board, and volunteers is prized as part of the learning experience. To that end, mentors and administrators will not “over-participate” in the workshop sessions so that participant voices have room to be heard. Instructors have a role to play in establishing and maintaining this culture by managing difficult group members. Here are a few typical behaviors, along with suggestions for how to handle them:

- The Non-Participant – Engage this person by calling him or her by name, directing an easy, non-threatening question to them, or responding to negative body language by asking if there is something they are unclear about or not complete with. Check in with them on breaks to see what's going on.
- The Monopolizer – This person will attempt to control the group by interrupting and answering all of your questions. Uncontrolled, this person risks losing other participants' attention and interest in participation. Summarize the monopolizer's comments quickly and move on. Recognize other participants and ask for input from those who have not been heard from. Interrupt if the monopolizer's behavior continues. Enlist help from administrators if necessary.
- The Distracter – This person will tell side jokes, have side conversations, and pull you and others off focus. Refer to the schedule as a way of bringing them back. Sometimes simply standing silent and waiting for them to stop has a big effect.

- The Challenger – Generalize. Remind the group that there is no “one way” but that you are providing information on proven practices and solutions. Cite sources when appropriate. Use “I” statements such as “I recommend.” Invite others to provide input and examples.
- The Wanderer – This person goes off on tangents. Ask if you may put this topic on an issues list that the group will come back to, if time permits. Return to the scheduled topic. You might also suggest that participants who would like to continue this discussion can do so during a break or over lunch.

Workshop Parameters

- **Guest instructors may be considered with advance consultation with administrators. Administrators (not instructors) are responsible for approaching any desired guest instructors to secure their participation with a letter of agreement and orientation to the audience and goals of the program.**
- Month 1 and 4 sessions take place in the Zephyr Room of the Rio Grande Depot in SLC. This room is equipped with a projector, speakers, wifi, and whiteboard. Other equipment needs should be noted in course outline.
- Month 2 sessions take place in the Archives meeting room of the Rio Grande Depot in order for other members of the museum community to attend.
- Alternative meeting locations can be considered with advance notice.
- Construct agendas to quarter-hour intervals (e.g., break for lunch at 12:00 or 12:15pm not 12:10pm – if we end up breaking a bit early or late, that’s okay). See schedule templates below.
- It is preferable to break up presentations with discussion, hands-on activities, etc. Some break should be scheduled every 90 minutes or so.
- Lunch will be 60 minutes in length.
- Any hands-on break-out activity will need a handout sheet indicating written instructions and timing. This keeps participants on track with what they are supposed to be doing.
- You can assign reasonable homework in Month 1 for review in Month 4 (ideally this is something that will provide a strong foundation and that will help sites reach bronze level in this module).
- Workshops in Months 1 and 4 should allocate 45-60 minutes at the end for participants to meet with their mentors in small break-out groups.
- Workshop in Month 4 should also have 30 minutes in the morning for site check-ins (especially to report on any homework given by instructors in Month 1).
- Workshop in Month 4 also needs 30-45 minutes prior to mentor break-outs for a wrap-up / evaluation conversation (our evaluator will attend this and take notes).
- In general, assume that participants are new to the content. Avoid too many ideas and nuances. Keep things simple, straightforward, and doable.

StEPs Standards for this Module – Collections (COLL)

COLL Standard 1 | The institution owns, exhibits, or uses collections that are appropriate to its mission. [1 indicator]

COLL Standard 2 | The institution legally, ethically, and effectively manages, documents, cares for, and uses the collections. [18 indicators]

COLL Standard 3 | The institution’s collections-related research is conducted according to appropriate scholarly standards. [1 indicator]

COLL Standard 4 | The institution strategically plans for the use and development of its collections. [1 indicator]

COLL Standard 5 | Guided by its mission, the institution provides public access to its collections while ensuring their preservation. [1 indicator]

Content Priorities from Utah Survey – COLL

A survey of Utah museums in February 2018 elicited these topic priorities for this module. Five of the pilot sites were among the 13 respondents. See the full survey [here](#). Note that these results are provided as general guidance only. Oftentimes unfamiliarity with an important topic elicits low ranking (i.e., they don't know what they don't know) Below are the top 4 priorities as identified by museums:

- 1) Conservation treatment and documentation
- 2) Collections Management
- 3) Collections care and preventative preservation
- 4) Collections planning

Please note that the collections module priorities are fairly evenly spread out, with not a lot of fluctuation on what is deemed “important” by sites.

Curriculum Development Notes – COLL

Of all the StEPs modules, COLL has the most resources already developed to mine for content. This will be a blessing and a curse, since we want to do more than rehash previous content (but don't want to reinvent the wheel), and because there is no way to cover it all. See the descriptions and links under the COLLECTIONS section in our general resource list [here](#).

[The AASLH curriculum package provided for the COLL Module](#) (called *Building a Meaningful Collection*) focuses on helping participants understand how to build a collection that is meaningful to their museum utilizing their mission statement and significance assessments to best understand the objects in their collection. It addresses COLL Standard Indicators 1A, 2B, 2C, 2D, 2E, 2F, 3A, and 4A.

- AASLH's curriculum focuses on the following: understanding and creating a scope of collection, why and how museums collect objects, that collections are a liability and need to be managed properly, understanding the difference between mission statement, bias in collecting practices, and scope of collections statement.
- AASLH's curriculum handouts relate to planning for and writing a meaningful collections scope, understanding and determining an object's significance, a glossary of common collections terms, and further resources for reading.
- AASLH's curriculum package is heavily focused on foundational concepts related to understanding your collection, how it came to be, and how to shape it appropriately for the future.
- The package zeroes in on collection scope with no overarching attention paid to understanding the module holistically, so does not cover preventative preservation, registration work, or extended collections policy and planning.
- Nonetheless, this scope of collection content is valuable for strategic thinking and something we definitely wish to include (although examples could be made more relevant). The scope of collections exercise is a good candidate for sites to take home as Month 1 homework.

In addition to the standard curriculum package, AASLH has seven webinars that may be of some use: 1) *Collections Care You Can do and What to Leave to Conservators*, 2) *Copyright Crash Course for Museums and Memory Institutions*, 3) *Deaccessioning: Devils in the details*, 4) *The ABCs of FICs: What To Do About 'Found in*

the Collection' Items, 5) *The How-Tos of Digital Collections Management*, 6) *Risk Assessment and Management for Collections*, and 7) *Juggling Balls and Other High Wire Acts: How a Well-crafted Collections Management Policy Can be the Safety Net that Saves Your Collections*. See the descriptions and links in our general resource list [here](#). In general, we have found that running parts of pre-recorded webinars does not keep audience attention, so prefer to extract what is useful to deliver live and then give credit to the source.

Other resources (with links on the general resource list [here](#)) are:

- Connecting to Collections resources, which include a wealth of options for pulling content.
- Two workshops from the Indiana Historical Society: one on Deaccessioning and another on how to process a donation from when it comes in the door.
- The 2-day Collections Stewardship workshop we did together in 2015 (hive off bits as needed).
- AAM workshop about Core Documents that has some slides about collections policy.
- An NDCC conservation webinar that is probably getting too into the weeds about specific materials.
- Training materials relating to significance assessment (Australian resource).
- *Understanding Provenance*, AASLH StEPs webinar #17 (April 2, 2019).

What isn't addressed in the existing resources that we may want to consider is something about Collections Advocacy, that is, funding of collections work and capitalizing on the visibility of collections to help fund their care. This continues to be a discussion that interests people and allows us to connect the last module of understanding our audience to turn around and help fund our collections work.

Another topic that continues to rise to the top in our work is helping people recognize when they should bring in a conservator or other expert - how to recognize problems, know their limits, and create conservation projects that can leverage basic collections care.

In addition, we have committed to giving record-keeping a major nod in all the modules. In the case of collections, this is less about how to do data entry and more about tying back to the idea that we are all merely temporary stewards of collections, that building sustainability to this work requires investing in policies, procedures, consistent record-keeping, and annual / project planning that make incremental improvements.

Finally, we do have the challenge that OMS has already developed some collections training, plus OMS and UH are partnering with the Conservation Center for Art and Historic Artifacts on an NEH grant to bring hands-on collections care workshops to Utah in 2019-2020. So there is no need to duplicate those services. Some overlap is inevitable because there are basic frameworks that must be covered, but generally, StEPs-UT curriculum will err toward a higher-level strategic approach more than how to condition report or build a box.

Curriculum Development Resources & Working Space

[Resources for Mentors & Instructors](#) is a shared space on our google drive where you will find resources (curriculum packages, webinars, etc.) for your module, the StEPs workbook, administrative forms, etc.

- In here is a folder called [Instructor Sandbox](#) (divided into module subfolders) where instructors and administrators can collaborate on development of content. Make copies of documents to put there and work on, rather than moving originals.
- The Curriculum Guide (this document) lives in this drive and is here for you to work in.

Resources for development of this module include an AASLH curriculum package for a one-day workshop, AASLH webinars on various topics, as well as other resources (discussed above).

- [Check here](#) for the current listing of what we already have on hand.
- We also have a [library of books](#) at your disposal. If you know of something we should acquire, please let us know.

INSTRUCTORS: Please fill out the sections below with your information for this MONTH 1 workshop. Clarify goals, logistics, and content. Note especially the prompts GIVEN IN TURQUOISE.

MONTH 1 Course Outline	Stewardship of Collections: An Introduction July 29, 2019
SUMMARY	This workshop orients participants to the overall COLL module by giving a 30,000 foot overview of all the standards and unacceptable practices in this module. Deeper focus is given to the following topics: Collections Policy and Scope of Collection, Significance Assessment, Collections Management.
StEPs STANDARDS AND PERFORMANCE INDICATORS	<p>This workshop curriculum supports the following standards and performance indicators from AASLH's StEPs program (see indicators above):</p> <ul style="list-style-type: none"> ▪ <i>COLL Standard 1</i> The institution owns, exhibits, or uses collections that are appropriate to its mission. 1A ▪ <i>COLL Standard 2</i> The institution legally, ethically, and effectively manages, documents, cares for, and uses the collections. 2A, 2B, 2F, 2C, 2I, 2J, 2Q ▪ <i>COLL Standard 3</i> The institution's collections-related research is conducted according to appropriate scholarly standards. 3A ▪ <i>COLL Standard 4</i> The institution strategically plans for the use and development of its collections. 4A ▪ <i>COLL Standard 5</i> Guided by its mission, the institution provides public access to its collections while ensuring their preservation. 5A
OUTCOMES	<p>From taking part in the workshop, participants will:</p> <ul style="list-style-type: none"> ▪ Understand the difference between a mission statement and the scope of collections. ▪ Understand the importance of a collections policy and how that relates to the practice of collections management. ▪ Participants should be able to assess the significance of objects within their collections and begin to think about significance as it pertains to their mission statement and scope of collections.
STAFFING FOR THIS WORKSHOP	<p>Primary content deliverers: Glenna Nielsen-Grimm, Robyn Haynie Additional third party instructor: N/A Facilitator (person to introduce instructors, reiterate StEPs goals, troubleshoot logistics, ensure branding, etc.): Megan van Frank</p>
THINGS TO KNOW ABOUT THIS DAY	<ul style="list-style-type: none"> ▪ Assume participants know nothing about this topic and are starting from scratch ▪ General Overview of module, 30,000 foot view needs to happen first ▪ You can assign reasonable homework for review in Month 4 (ideally this should be foundational work and help sites reach bronze level in this module).
WORKSHOP TIMING	<ul style="list-style-type: none"> ▪ Full day workshop – 9:00am to 5:00pm ▪ Allocate 45-60 minutes at the end for site/mentor breakout groups. ▪ See schedule template at the end of this document as a guide for agenda.
SPACE NEEDS	<ul style="list-style-type: none"> ▪ Main session will occur in Zephyr Room with tables set up classroom style. ▪ Class size will comprise 7 museums sending 1-3 people each (=15) plus 3 mentors plus 3 admin staff, plus 2 instructors = approximately 20-25 people ▪ We will need 6 separate stations for the Monopoly game. We can reconfigure the room when we do this activity.

EQUIPMENT NEEDED	<ul style="list-style-type: none"> ▪ Projector and computer for PowerPoint slides ▪ Dongles and/or adaptors (HDMI or VGA) ▪ Demo objects for significance assessment. Robyn brough collection of child toys.
MATERIALS	<p>Participants should bring:</p> <ul style="list-style-type: none"> ▪ Existing documents pertaining to collections management (mission statement, scope of collections, collections policy) for use in HOA 1 <p>Instructors should bring:</p> <ul style="list-style-type: none"> ▪ This curriculum and other notes they have prepared <p>Admin should bring for all participants:</p> <ol style="list-style-type: none"> 1. PowerPoint slides on a flash drive or laptop computer 2. Agenda 3. PowerPoint slides in note format (3 slides per page) 4. Activity handouts: <ul style="list-style-type: none"> ▪ COLL4.1-HOA1-WhatYouCollect ▪ COLL4.1-HOA2-SignificanceAssessment ▪ COLL4.1-HOA3-Monopoly 5. Copy of the following informational handout: <ul style="list-style-type: none"> ▪ COLL4.1-Handout-SigAssessTEMPLATES 6. Copy of the StEPs program workbook for reference if needed 7. 6 Monopoly game sets (free download needs printing & cutting apart)
HOMEWORK ASSIGNED	<ol style="list-style-type: none"> 1. Play Monopoly game with your museum team (and any other relevant stakeholders) 2. Create a Significance Assessment for 2 important objects from your collection 3. Draft a Scope of Collections statement for your museum (or revisit existing scope statement) 4. Based on your self-assessment, work with your Mentor to implement at least one additional project for this module.
RESOURCES USED	<p>Resources Used in creation of this session</p> <ul style="list-style-type: none"> ▪ Monopoly: http://www.museumstudy.com/courses/course-list/monopoly/ ▪ Building a meaningful collection: AASLH curriculum package ▪ American Alliance of Museums Collections Management Policy overview https://www.aam-us.org/programs/ethics-standards-and-professional-practices/collections-management-policy/ ▪ Association for Registrars and Collections Specialists (ARCS) http://www.arcsinfo.org/ ▪ Australian Museums & Galleries Association of Victoria (AMaGA) Online Resources https://amagavic.org.au/resources/infosheets and https://amagavic.org.au/training-videos ▪ Buck & Gilmore, eds. Museum Registration Methods, 5th Edition, AAM Press, 2014. ▪ Catlin-Legutko & Klingler, eds., Small Museum Toolkit, Altamira Press, 2012 ▪ National Park Service, Conserve-o-grams https://www.nps.gov/museum/publications/consveogram/cons_toc.html ▪ National Park Service, Museum Handbook Part I, Museum Collections, 1999. https://www.nps.gov/museum/publications/handbook.html ▪ Reed, Caroline, Reviewing Significance 3.0: A Framework for Assessing Museum, Archive and Library Collections' Significance, Management and Use, 2018 https://collectionstrust.org.uk/resource/reviewing-significance-3-0/ [See HANDOUT] ▪ Simmons, John E., Things Great and Small: Collections Management Policies, Rowman & Littlefield, 2018 ▪ Winkworth, Kylie & Roslyn Russell, Significance 2.0: A Guide to Assessing the Significance of Collections, 2009 https://www.arts.gov.au/what-we-do/museums-libraries-and-galleries/significance-20 [See HANDOUT]

CURRICULUM OUTLINE

- A. Overview of all standards
 - a. Standards 1-5 (slides for each) and their indicators
 - b. Unacceptable practices for COLL
 - c. Collection Ethics: Standard 2C, 3
- B. Mission and Scope of Collections: Standard 1, 2F
 - a. 1. “Building a Meaningful Collection” (AASLH curriculum package)
 - b. 2. What is a scope of collections statement
 - c. What, Why, and How do museums collect
 - d. Good and Bad Statements
 - e. Writing a scope of collections statement
- C. Deeper dives into the following topics
 - a. Significance Assessment through research and documentation
 - b. Collections Policy - Policy game activity ‘Monopoly’ IPSCC
<http://www.museumstudy.com/courses/course-list/monopoly/>
- D. Homework from Month 1 to report in Month 4 - something foundational
 - a. Play Monopoly with your collections crew
 - b. Scope of collections exercise from “Building a Meaningful Collection” (AASLH curriculum package)? relative to their own staff/collection
 - c. Significance assessment of 2-3 objects in your collections

SUGGESTED TEMPLATE | MONTH 1 AGENDA

DATE | 9:00am–5:00pm @ Rio Grande Depot, 300 Rio Grande Street, Salt Lake City, UT 84101

9:00–9:15am	Welcome and Introductions (Everyone) <ul style="list-style-type: none"> Housekeeping, introductions, group ground rules, agenda overview, goals for today
9:15–10:15 am	Collections Module Overview <ul style="list-style-type: none"> What’s in store for the COLL Module Collections Standards and Unacceptable COLL Practices
10:15–11:00 am	Scope of Collections – Responsibilities of Stewardship <ul style="list-style-type: none"> Public trust, ethics, and the hard realities of Collections Stewardship HANDS-ON ACTIVITY #1 Scope of Collections
11:00–11:15 am	BREAK
11:15–12:15 pm	Scope of Collections: Building a Meaningful Collection <ul style="list-style-type: none"> Why, how, what, and for whom do museums collect? Why develop a scope of collections and how to do it How scope of collections fits into other collections planning and management work
12:15–1:15 pm	LUNCH
1:15–3:00 pm	Significance Assessment <ul style="list-style-type: none"> What is significance, why assess it, how to go about it HANDS-ON ACTIVITY #2 Significance Assessment
3:00–3:15 pm	BREAK
3:15–4:15 pm	Collections Policy <ul style="list-style-type: none"> What & why you need a policy and how that’s different from procedures & plans HANDS-ON ACTIVITY #3 Monopoly: Play the Game
4:15–4:30 pm	Wrap-up (Everyone) <ul style="list-style-type: none"> Recap of the day, key takeaways, due dates, certificates, funding, etc. Assignment – (1) Play Monopoly with your work team, (2) do a Significance Assessment on 2 important objects, and (3) draft a Scope of Collections statement for your museum Recap of the day, key takeaways, homework assignment
4:30–5:00 pm	Mentor Groups Break-out (Mentors with their 2-3 groups) <ul style="list-style-type: none"> How has today’s content affected your priorities? Decision on module project.

INSTRUCTORS: Please fill out the sections below with your information for this MONTH 2 workshop. Clarify goals, logistics, and insert content. Note especially the prompts GIVEN IN RUST.

MONTH 2 Course Outline	Mini-Workshop: When to Call a Conservator August 26, 2019
SUMMARY	As part of the Office of Museum Services regular mini-workshop (Watch & Talk or Skills Lab) series, this workshop is open to museum personnel outside the StEPs-UT cohort, but is branded as StEPs-UT . This workshop takes a deeper dive into collections care -- what you can do yourself and what you should leave to conservators, plus a tutorial on basic cleaning and tools used.
StEPs STANDARDS AND PERFORMANCE INDICATORS	This workshop curriculum supports the following standards and performance indicators from AASLH's StEPs program (see indicators above): COLL 2D, 2L, 2M, 2N, 2O, 2P, 2Q
OUTCOMES	From taking part in the workshop, participants will: <ul style="list-style-type: none"> ▪ Understand that preventive conservation is a cost-effective and minimally impactful way to prevent object deterioration ▪ Understand the importance of documenting object condition before handling ▪ Learn basic object condition reporting ▪ Learn basic cleaning techniques ▪ Know when and how to get help
STAFFING FOR THIS WORKSHOP	Primary content deliverers: Robyn Haynie, Glenna Nielsen-Grimm Additional third party instructor: n/a Facilitator (person to introduce instructors, reiterate StEPs goals, troubleshoot logistics, ensure branding, etc.): Emily Johnson
THINGS TO KNOW ABOUT THIS DAY	<ul style="list-style-type: none"> ▪ As part of Museum Services regular 101 series, this is open to the wider museum community, so topic must appeal to general museum "public." ▪ Assume participants know nothing about this topic and are starting from scratch. ▪ Topic may build on content already forecast in Month 1 but still be self-contained for the newcomers and non-StEPs people in the room. ▪ The model for these mini-workshops is conversational and interactive. ▪ You may bring in another instructor for this month (who can be paid if needed).
WORKSHOP TIMING	<ul style="list-style-type: none"> ▪ Quarter-day workshop – 11:00am to 1:00pm ▪ Donut social for StEPs cohort starting at 10:00am – please join us! ▪ Site participants connect with mentors afterward for lunch
SPACE NEEDS	<ul style="list-style-type: none"> ▪ Main session will occur in the Archives Training Room in the Rio Grande complex, with tables set up classroom style. ▪ Class size will comprise 7 StEPs-UT museums sending 1-3 people each (=15) plus 3 mentors plus 3 admin staff, plus 3 instructors, plus seats for "general" museum participants = approximately 40 people ▪ Registration will be limited due to space constraints = 36 people total ▪ No break-out spaces are needed.
EQUIPMENT NEEDED	<ul style="list-style-type: none"> ▪ Projector and computer for PowerPoint slides ▪ Dongles and/or adaptors (HDMI or VGA) ▪ Tables, electricity for vacuums, extension cords

MATERIALS	<p>Participants should bring: nothing is needed</p> <p>Instructors should bring: conservation and cleaning supplies to use as demonstration (vacuum cleaners, screens, brushes, etc.)</p> <p>Admin should bring for all participants:</p> <ol style="list-style-type: none"> 1. PowerPoint slides and webinar on a flash drive or laptop computer 2. Agenda 3. PowerPoint slides in note format (3 slides per page) 4. Activity instructions: <ul style="list-style-type: none"> ▪ COLL4.2-HOA1-CleaningInstructions 5. Handouts: <ul style="list-style-type: none"> ▪ COLL4.2 Handout-ConsDecisionmaking 6. Textiles and variety of other small objects to clean 7. Kits for each participant to use and take away – see supply list below 8. Things Great & Small book copies for StEPs-UT orgs 9. Copy of the StEPs program workbook for reference if needed <p>Cleaning Kit supplies for each participant (qty based on 36 participants)</p> <ul style="list-style-type: none"> ▪ (12) Baby Nasal Aspirator - https://www.amazon.com/gp/product/B00PB9KSB6/ref=ox_sc_act_title_9?smid=A2P5I4NW0QOAX1&psc=1 ▪ (3) Microfiber Cloths - https://www.amazon.com/gp/product/B00SENOIU6/ref=ox_sc_act_title_8?smid=A1RKELVBY446LD&psc=1 ▪ Cotton Wool - https://www.amazon.com/gp/product/B000VB2XKI/ref=ox_sc_act_title_7?smid=A3BL3YP21S2J9F&psc=1 ▪ (18) Brushes - https://www.amazon.com/gp/product/B003HR6RDW/ref=ox_sc_act_title_1?smid=ATVPDKIKX0DER&psc=1 ▪ (5) Hake Brushes - https://www.amazon.com/gp/product/B00A6WJZDU/ref=ox_sc_act_title_6?smid=A1GXT7IMS99GTX&psc=1 ▪ Orvus Paste - https://www.amazon.com/Orvus-Wa-Paste-Cleaner-Ounce/dp/B004M5MGNI/ref=sr_1_2?keywords=orvus+paste&qid=1565039532&s=gateway&sr=8-2 ▪ Plastic Containers - https://www.amazon.com/gp/product/B07GT9CJSP/ref=ox_sc_act_title_4?smid=ABXK785N6GDTV&psc=1 ▪ Smoke Sponge - https://www.amazon.com/gp/product/B076YJ2BMN/ref=ox_sc_act_title_3?smid=A2KOFF6V545J9Y&psc=1 ▪ Bamboo Skewers (these obv don't need to come from Amazon but they can) - https://www.amazon.com/gp/product/B07SYP5X14/ref=ox_sc_act_title_2?smid=A1H15VZN0TTETW&psc=1
HOMEWORK ASSIGNED	<ul style="list-style-type: none"> ▪ None for this month
RESOURCES USED	<p>CCI Notes: https://www.canada.ca/en/conservation-institute/services/conservation-preservation-publications/canadian-conservation-institute-notes.html</p> <p>NPS Conserve-O-Grams on cleaning #7/5; #1/6; #15/2; #8/1 https://www.nps.gov/museum/publications/consveogram/cons_toc.html</p> <p>Library of Congress Collections Care https://www.loc.gov/preservation/care/</p> <p>Regional Alliance for Preservation: http://www.preservationresources.org/</p> <p>Northern States Conservation Center technical bulletin MS217</p> <p>Robyn wants to use PAGE 7 of this document as a handout in Month 2: http://media.vam.ac.uk/media/documents/legacy_documents/file_upload/27932_file.pdf</p>

CURRICULUM OUTLINE

GOALS FOR TODAY

- Difference between Preventive vs. Remedial Conservation
- Overview of wet and dry cleaning methods
- Practice with dry cleaning
- Importance of observation and documentation
- Understand limits of what you should and should not attempt on your own

INTRODUCTION TO CONSERVATION

Preventive Conservation

- Addresses “Agents of Deterioration”
- Focuses on object’s environment to prevent deterioration
- Preventive conservation includes:
 - ✓ Monitoring and controlling environment (relative humidity, temperature, light)
 - ✓ Using appropriate storage and display materials
 - ✓ Creating and following an integrated pest management plan
 - ✓ Creating and following a housekeeping schedule
 - ✓ Objects handled only by trained personnel

Remedial Conservation

- Addresses a critical need
 - ✓ Structural stabilization
 - ✓ Stop active deterioration
- Is irreversible
 - ✓ Although hopefully re-treatable
 - ✓ May alter object’s aesthetics
- Is NOT restoration
 - ✓ Goal is to stabilize object
 - ✓ Not to make it look better

Conservation Decision-Making

- 1) Why is action needed?
- 2) Can the use or environment be adapted instead of intervening on the object(s)?
- 3) Do I need to consult stakeholders, peers, other specialists?
- 4) What are my options for action which will produce an appropriate result with minimum intervention?
- 5) What effect will my action(s) have on the evidence of the factors contributing to the identity and significance of the object(s)?
- 6) Do I have sufficient information and skill to assess and implement action(s)?
- 7) Is my intended action(s) the best use of resources and is it sustainable?
- 8) How will my action(s) affect subsequent action(s)?
- 9) Have I taken into account the future use and location of the object(s) and have I made decisions accordingly?
- 10) Will my action(s) be fully documented to a known and accepted standard?
- 11) Will the information resulting from my action(s) be accessible?

Cleaning Collections Objects

- Cleaning is an important element of collections management
- Cleaning is an *IRREVERSIBLE* conservation treatment
- Over-cleaning an object can cause irreparable harm and decrease an object’s value

A Bit About Dirt

- Dirt is made up of tiny particles of hair, skin, pollen, sand, minerals, etc.
- Dirt particles can be SHARP
- Dirt can be hygroscopic (absorb water), which can make it difficult to remove from an object's surface
- Where Did The Dirt Come From?
- IS THE 'DIRT' SIGNIFICANT?
- What Can We Learn From Dirt?
 - ✓ Vulnerable objects
 - ✓ Effectiveness of gallery maintenance / HVAC systems
 - ✓ Pests
 - ✓ Object history
- How Often Should We Clean Objects?
- When Shouldn't You Work on an Object?

Cleaning Methods: Dry/Surface Cleaning

- Testing
- How Do I Know When to Stop?

Cleaning Methods: Wet

- Products to Avoid
- How Do We Know When to Stop?
- Clean Your Cleaning Supplies!
- Documentation of your maintenance activities
- What's in Your Basic Cleaning Kit?

HANDS-ON ACTIVITY with supervision

What We Have Covered Today:

- Preventive vs. Remedial Conservation
- Overview of wet and dry cleaning methods
- Dry cleaning techniques for object maintenance

Key Takeaways

- Preventive conservation is a cost-effective and minimally impactful way to prevent object deterioration
- Routine maintenance of collections spaces and collections objects is a critical part of collections management
- Any treatment of an object – including cleaning – should only be done after careful observation and documentation

SUGGESTED TEMPLATE | WORKSHOP 2 AGENDA

DATE | 11:00am–1:00pm (preceded by StEPs-UT social hour) @ State Archives, 346 Rio Grande Street, Salt Lake City, UT

11:00–11:15 am	Welcome (Everyone) <ul style="list-style-type: none">▪ Housekeeping, introductions, group ground rules, agenda overview, goals for today▪ Introduction of workshop as part of StEPs-UT series
11:15–12:45 am	Collections Care Discussion and Cleaning kit demo and Practice
12:45–1:00 pm	Wrap-up (Everyone) <ul style="list-style-type: none">▪ Recap, key takeaways, questions, acknowledgement of StEPs-UT, MuseNews plug

INSTRUCTORS: Please fill out the sections below with your information for this MONTH 4 workshop. Clarify goals, logistics, and insert content. Note especially the prompts GIVEN IN GREEN.

MONTH 4 Course Outline	Title: Gaining Control of Collections Management October 28, 2019
SUMMARY	This workshop is a deeper dive into COLL standard 2, including documentation systems and techniques (records, numbering, condition reporting, databases), thoughtful accessioning, as well as how to rein in collections (risk management, FICs, and deaccessioning).
StEPs STANDARDS AND PERFORMANCE INDICATORS	This workshop curriculum supports the following standards and performance indicators from AASLH's StEPs program (see indicators above): COLL 1A, 2B, 2C, 2G, 2J, 2K, 3A
OUTCOMES	From taking part in the workshop, participants will understand: <ul style="list-style-type: none"> ▪ Collections management procedures help establish control over collection. ▪ Object records are essential for collections care. ▪ Techniques and systems available at all levels and price points to organize your collection information. ▪ Establishing legal ownership of your objects is critical and there are procedures to help when you aren't sure if an object is yours. ▪ Deaccessioning is an important tool to create a strong collection.
STAFFING FOR THIS WORKSHOP	Primary content deliverers: Robyn Haynie and Glenna Nielsen-Grimm Additional third party instructor: none Facilitator (person to introduce instructors, reiterate StEPs goals, troubleshoot logistics, ensure branding, etc.): Jennifer Ortiz
THINGS TO KNOW ABOUT THIS DAY	<ul style="list-style-type: none"> ▪ This day is a deeper dive into topics briefly touched upon in Month 1 ▪ Note workshop timings below, which will shorten time for content presentation.
WORKSHOP TIMING	<ul style="list-style-type: none"> ▪ Full day workshop – 9:00am to 5:00pm. ▪ Allocate 30 minutes in the morning for museums to report on homework. ▪ Allocate 30-45 minutes at end of the day for module wrap-up conversation (according to evaluation plan) and a quick forecast of next module. ▪ Allocate 45-60 minutes at the end for sites to meet with their mentors. ▪ See schedule template at the end of this document as a guide for agenda.
SPACE NEEDS	<ul style="list-style-type: none"> ▪ Main session will occur in Zephyr Room with tables set up classroom style. ▪ Class size will comprise 7 museums sending 1-3 people each (=15) plus 3 mentors plus 3 admin staff, plus 2 instructors = approximately 20-25 people ▪ No breakout spaces needed.
EQUIPMENT NEEDED	<ul style="list-style-type: none"> ▪ Projector and computer for PowerPoint slides ▪ Dongles and/or adaptors (HDMI or VGA) ▪ Speakers
MATERIALS	<p>Participants should bring:</p> <ol style="list-style-type: none"> 1. Homework from Month 1 - significance assessments and scope of collections <p>Instructors should bring:</p> <ol style="list-style-type: none"> 2. This curriculum and other notes/materials they have prepared 3. Musarch example loaded onto laptop being used for presentation as demo 4. Objects for accessioning / deaccessioning activities <p>Admin should bring for all participants:</p> <ol style="list-style-type: none"> 5. PowerPoint slides on a flash drive or laptop computer

	6. Agenda 7. PowerPoint slides in note format (3 slides per page) 8. Activity instructions: <ul style="list-style-type: none"> COLL4.4-HOA1-Accessioning COLL4.4-HOA2-Deaccessioning 9. Handouts: <ul style="list-style-type: none"> 1.Small_Museums_Cataloguing_Manual_4th 2.Labeling Objects Resources 3.aaslh_TL286_ChooseCMS__Appendix 4.LoanFactSheet_Template 5.Abandoned Property Info _Utah Code 10. HSL Module Checklist 11. StEPS COLL Module Survey 12. Copy of the StEPs program workbook for reference if needed
HOMEWORK ASSIGNED	<ul style="list-style-type: none"> Report out from Month 1 assignments and other activity they've been up to as part of the module.
RESOURCES USED	<p>American Alliance for Museums, <i>General Facility Report</i>, https://ww2.aam-us.org/ProductCatalog/Product?ID=891</p> <p>AASLH and Parks Canada, <i>Nomenclature for Museum Cataloging</i>, https://www.nomenclature.info/index.app</p> <p>Association for Registrars and Collections Specialists (ARCS) http://www.arcsinfo.org/</p> <p>Australian Museums & Galleries Association of Victoria (AMaGA) Online Resources https://amagavic.org.au/resources/infosheets and https://amagavic.org.au/training-videos</p> <p>Carpinone, E., <i>Collections Management Systems: One Size Does NOT Fit All</i>, https://westmuse.org/sites/westmuse.org/files/documents/WMA2014/Sessions/WMA2014_ChoosingCMD.pdf</p> <p>Collections Trust UK, <i>Collections Management</i>, https://collectionstrust.org.uk/collections-management/</p> <p>Buck, Rebecca & Jean Gilmore, eds. <i>Museum Registration Methods</i>, 5th Edition, AAM Press, 2014.</p> <p>Catlin-Legutko, Cinnamon & Klingler, Stacy, eds., <i>Small Museum Toolkit</i>, Altamira Press, 2012.</p> <p>Kipp, A., <i>Managing Previously Unmanaged Collections: Practical Guide for Museums</i>, Rowman Littlefield, 2016.</p> <p>Malaro, M.C., <i>A Legal Primer on Managing Museum Collections</i>, 3rd Ed, Smithsonian Museum Press, 2012.</p> <p>Simms, M., <i>Found in Collections: A Reference Guide for Reconciling Undocumented Objects in Historical Museums</i>, 2003 http://www.foundincollections.com/</p> <p>State of Utah, <i>Be Ready Utah</i>, https://www.utah.gov/beready/index.html</p> <p>Sutley, B., http://www.connectingtocollections.org/wp-content/uploads/2016/07/Sutley-presentation-on-Forms.pdf</p>

CURRICULUM OUTLINE

- A. Introduction
 - a. Review Homework
 - b. What this workshop covers today Focus on G,H,I,J,K
 - c. Review of Standards 2
- B. Taking Control of Collections Management
 - a. Documenting Collections: object records and accessioning
 - b. Numbering systems

- c. Basic forms
 - d. Database options
- C. Maintaining Control of Collections
 - a. Approaches: Analog/digital, sample survey or object-by-object examination
 - b. Optimizing time: information gathering during inventory process
 - c. Common issues: missing objects, extra objects, broken objects, accessories
- D. Reining in Your Collections
 - a. Found in Collections Objects
 - b. Deaccessioning
 - c. Disposal
- E. Wrap up

SUGGESTED TEMPLATE | WORKSHOP 4 AGENDA

DATE | 9:00am–5:00pm @ Rio Grande Depot, 300 Rio Grande Street, Salt Lake City, UT 84101

9:00–9:15 am	Welcome Housekeeping, introductions, group ground rules, agenda overview, goals for today
9:15–9:45 am	Homework Updates <ul style="list-style-type: none"> ▪ Monopolicy exercise, Significance assessments, and Collections Scope draft
9:45–11:00 am	Taking Control of Collections: Basic Documentation Techniques <ul style="list-style-type: none"> ▪ Review Standard 2 ▪ Object Records, Numbering Systems, Condition Reporting
11:00–11:15 am	BREAK
11:15–12:15 pm	HANDS-ON ACTIVITY #1 Accessioning Objects
12:15–1:15 pm	LUNCH
1:15–2:30 pm	Maintaining Control of Your Collections <ul style="list-style-type: none"> ▪ Collection management systems (databases)
2:30–2:45 pm	BREAK
2:45–3:30 pm	Reining in Collections <ul style="list-style-type: none"> ▪ Risk management ▪ What to do with FICs (Found In Collections) ▪ Deaccessioning and Disposal
3:30–4:15 pm	HANDS-ON ACTIVITY #2 Deaccessioning Objects
4:15–4:45 pm	Session & Module Wrap-up (Everyone) <ul style="list-style-type: none"> ▪ Recap of the day, key takeaways ▪ Module wrap-up conversation (according to evaluation plan)
4:45–5:00 pm	Mentor Groups Break-out (Mentors with their 2-3 groups)

COLL STANDARDS CHECK - HAVE THESE BEEN ADDRESSED BY CURRICULUM?

Standards 1A, 2A, 2B, 2C, 2D, 2E, 2F, 2G, 2H, 2I, 2J, 2K, 2L, 2M, 2N, 2O, 2P, 2Q, 2R, 3A, 4A, 5A

- ADDRESSED in COLL: 1A,2A,2C,2F,3A,4A,5A,2D,2L,2M,2N,2O,2P,2Q, 2B,2G,2J,2K,
- NOT ADDRESSED: 2E,2H,2I,2R,

This Module Covered:

- Building a Meaningful Collection
 - ✓ Scope of Collections
 - ✓ Significance Assessment
 - ✓ Emphasis on Policies
- Collections Care
 - ✓ Preventive Conservation
- Managing Collection
 - ✓ Documentation of all kinds
 - ✓ Emphasis on procedures & proactive management

RESEARCH & RELATED BUDGET - Budget Period 1

OMB Number: 4040-0001
Expiration Date: 12/31/2022

ORGANIZATIONAL DUNS:

(b) (4)

Enter name of Organization:

Utah Division of Arts & Museums

Budget Type:

☒ Project☐ Subaward/Consortium

Budget Period: 1

Start Date:

03/20/2021

End Date:

02/29/2024

A. Senior/Key Person

Prefix	First	Middle	Last	Suffix	Base Salary (\$)	Months			Requested Salary (\$)	Fringe Benefits (\$)	Funds Requested (\$)
						Cal.	Acad.	Sum.			
	Jennifer		Ortiz		0.00				0.00	0.00	0.00

Project Role: Project Administrator

	Jennifer		Ortiz						0.00	0.00	0.00
--	----------	--	-------	--	--	--	--	--	------	------	------

Project Role: Project Director

	Emily		Johnson						0.00	0.00	0.00
--	-------	--	---------	--	--	--	--	--	------	------	------

Project Role: Project Administrator

Additional Senior Key Persons:

Add Attachment

Delete Attachment

View Attachment

Total Funds requested for all Senior Key Persons in the attached file

Total Senior/Key Person

0.00

B. Other Personnel

Number of Personnel	Project Role	Months			Requested Salary (\$)	Fringe Benefits (\$)	Funds Requested (\$)
		Cal.	Acad.	Sum.			
<input type="text"/>	Post Doctoral Associates	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	Graduate Students	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	Undergraduate Students	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	Secretarial/Clerical	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
1	Preservation Outreach Coordinator	36.00	<input type="text"/>	<input type="text"/>	(b) (6)	(b) (6)	(b) (6)
1	Total Number Other Personnel						(b) (6)
Total Salary, Wages and Fringe Benefits (A+B)							(b) (6)

C. Equipment Description

List items and dollar amount for each item exceeding \$5,000

Equipment item	Funds Requested (\$)
<input type="text"/>	<input type="text"/>
Additional Equipment: <input type="text"/>	<input type="text"/>
<input type="button" value="Add Attachment"/>	<input type="button" value="Delete Attachment"/>
<input type="button" value="View Attachment"/>	
Total funds requested for all equipment listed in the attached file	<input type="text"/>
Total Equipment	<input type="text"/>

D. Travel

	Funds Requested (\$)
1. Domestic Travel Costs (Incl. Canada, Mexico and U.S. Possessions)	<input type="text" value="29,685.00"/>
2. Foreign Travel Costs	<input type="text"/>
Total Travel Cost	<input type="text" value="29,685.00"/>

E. Participant/Trainee Support Costs

	Funds Requested (\$)
1. Tuition/Fees/Health Insurance	<input type="text" value="0.00"/>
2. Stipends	<input type="text" value="35,000.00"/>
3. Travel	<input type="text" value="17,255.00"/>
4. Subsistence	<input type="text" value="10,664.00"/>
5. Other <input type="text" value="Scholarships"/>	<input type="text" value="7,200.00"/>
<input type="text"/> Number of Participants/Trainees	
Total Participant/Trainee Support Costs	<input type="text" value="70,119.00"/>

F. Other Direct Costs

		Funds Requested (\$)
1. Materials and Supplies		2,700.00
2. Publication Costs		11,600.00
3. Consultant Services		(b) (6)
4. ADP/Computer Services		0.00
5. Subawards/Consortium/Contractual Costs		16,000.00
6. Equipment or Facility Rental/User Fees		0.00
7. Alterations and Renovations		0.00
8.	N/A	0.00
9.		
10.		
Total Other Direct Costs		(b) (6)

G. Direct Costs

	Funds Requested (\$)
Total Direct Costs (A thru F)	347,604.00

H. Indirect Costs

Indirect Cost Type	Indirect Cost Rate (%)	Indirect Cost Base (\$)	Funds Requested (\$)
None--State of Utah	0.00		0.00
Total Indirect Costs			0.00

Cognizant Federal Agency

(Agency Name, POC Name, and POC Phone Number)

State of Utah oversees the Utah Division of Arts & Museums. The State of Utah does not issue indirect cost rates for this type of grant.

I. Total Direct and Indirect Costs

	Funds Requested (\$)
Total Direct and Indirect Institutional Costs (G + H)	347,604.00

J. Fee

Funds Requested (\$)

K. Total Costs and Fee

	Funds Requested (\$)
Total Costs and Fee (I + J)	347,604.00

L. Budget Justification

(Only attach one file.)

1241-Budget Justification.pdf

Add Attachment

Delete Attachment

View Attachment

RESEARCH & RELATED BUDGET - Cumulative Budget

		Totals (\$)
Section A, Senior/Key Person		0.00
Section B, Other Personnel		(b) (6)
Total Number Other Personnel	1	
Total Salary, Wages and Fringe Benefits (A+B)		(b) (6)
Section C, Equipment		
Section D, Travel		29,685.00
1. Domestic	29,685.00	
2. Foreign		
Section E, Participant/Trainee Support Costs		70,119.00
1. Tuition/Fees/Health Insurance	0.00	
2. Stipends	35,000.00	
3. Travel	17,255.00	
4. Subsistence	10,664.00	
5. Other	7,200.00	
6. Number of Participants/Trainees		
Section F, Other Direct Costs		(b) (6)
1. Materials and Supplies	2,700.00	
2. Publication Costs	11,600.00	
3. Consultant Services	(b) (6)	
4. ADP/Computer Services	0.00	
5. Subawards/Consortium/Contractual Costs	16,000.00	
6. Equipment or Facility Rental/User Fees	0.00	
7. Alterations and Renovations	0.00	
8. Other 1	0.00	
9. Other 2		
10. Other 3		
Section G, Direct Costs (A thru F)		347,604.00
Section H, Indirect Costs		0.00
Section I, Total Direct and Indirect Costs (G + H)		347,604.00
Section J, Fee		
Section K, Total Costs and Fee (I + J)		347,604.00

All of the items listed below, whether supported by NEH funds or cost sharing are reasonable, necessary to accomplish project objectives, allowable in terms of 2 CFR 200 Subpart E - Cost Principles, auditable, and will incur during the period of performance (March 1, 2021 – February 28, 2024). Items that are cost shared are bolded in **RED**. Cost Share item sub-totals that align with the budget sheet categories are highlighted in **YELLOW**.

SENIOR KEY PERSONNEL TOTALS FOR 3 YEARS: \$0 | COST SHARE: \$119,426

- COST SHARE:** Jennifer Ortiz, Museum Services Manager at the Utah Division of Arts & Museums, will oversee the hired Preservation Outreach Coordinator for the course of the NEH grant project and is serving as Authorizing Agent for the grant.
 Salary: 20% of her annual time plus a 2% COLA adjustment with each year (State of Utah employee). Year I: (b) (6), Year II: (b) (6), Year III: (b) (6)
 Fringe Benefits: calculated at 25% of percentage of salary for project time @ 20%. Year I: (b) (6), Year II: (b) (6), Year III: (b) (6)
Total Salary and Fringe Benefits: (b) (6)
- COST SHARE:** Emily Johnson, Museum Specialist at the Utah Division of Arts & Museums, will serve as Project Director for this grant for the Utah Division of Arts & Museums. She will also cross train the hired Preservation Outreach Coordinator. She will also assist in aligning NEH project work with Utah Division of Arts & Museums strategic goals across the period of performance
 Salary: 17% of her annual time plus a 2% COLA adjustment with each year (State of Utah employee): Year I: (b) (6), Year II: (b) (6), Year III: (b) (6).
 Fringe Benefits: calculated at 25% of percentage of salary for project time @ 17%
 Year I: (b) (6), Year II: (b) (6), Year III: (b) (6)
Total Salary and Fringe Benefits: (b) (6)
- COST SHARE:** Megan van Frank, Director, Center for Heritage, Utah Humanities will serve on the Administrative Team at 15% of her annual time with fringe benefits, plus a 2% COLA increase: Year I: (b) (6), Year II: (b) (6), Year III: (b) (6) **Total salary and fringe benefits: (b) (6)**

OTHER PERSONNEL. Total: (b) (6)

- Preservation Outreach Coordinator, to be hired at the Utah Division of Arts & Museums at 100% of their time (b) (6). The Coordinator will spend 100% of their time revising and developing preservation based curriculum, facilitating in-person and virtual training opportunities, doing preservation assessments at museums/collecting institutions, establishing and managing the mentor network, and providing technical services to collecting institutions across the state.
 Salary: 100% of time. Year I: (b) (6), Year II: (b) (6), Year III: (b) (6),
 i. Fringe Benefits: calculated at the state of Utah at 25% of salary: Year I: (b) (6), Year II: (b) (6), Year III: (b) (6)
 ii. Total salary and fringe benefits: Year I: (b) (6), Year II: (b) (6), Year III: (b) (6)

EQUIPMENT (if over 5k): N/A

TRAVEL TOTALS FOR THREE YEARS: \$29,685 | COST SHARE: \$24,400

Year 1 Total: \$6,900 | COST SHARE: \$4,900

- Preservation Outreach Coordinator. Total: \$3,400

- Site visits to museums off the Wasatch Front (\$150/trip x 6 trips=\$900)
- Preservation Assessments with first half of the Community Preservation Team (CPT) sites (\$150/trip x 4 trips = \$600)
- Orientation meeting for CPT sites in Fall 21 (\$350)
- Travel to Utah Museums Association conference (\$350)
- American Association for State & Local History Annual Conference for Field Services meeting (\$1,200)
- Utah Field Services Providers (Ortiz, Johnson, van Frank). Total: \$3,500
 - Orientation meeting for CPT sites in Fall 21 (\$350 x 3 admin=\$1,050)
 - Site visits to museums off the Wasatch Front for one admin (\$150/trip x 6 trips=\$900)
COST SHARE: site visits for 2 remaining admin (\$150/trip x 6 trips x 2 admin= \$1800)
 - Funds for travel for one admin to the Utah Museums Association conference (\$350)
COST SHARE: Funds for travel for two remaining admin (\$350 x 2 admin= \$700)
 - Funds for travel for one admin for the American Association for State & Local History Annual Conference for Field Services meeting (\$1,200) **COST SHARE:** Funds for travel for two remaining admin to AASLH: \$1200 x 2 admin = \$2,400

Year II Total: \$10,900 | COST SHARE: \$8,700

- Preservation Outreach Coordinator. Total: \$5,500
 - Travel for two part workshops in Region I January/February 2022, April/May 2022, July/August 2022, October/November 2022 (\$350 per trip x 8 trips in Year II =\$2,800)
 - Community Preservation Team mid-term meeting Spring 22 (\$350), Preservation Assessments with second half of the Community Preservation Team (CPT) sites (\$150/trip x 3 trips = \$450)
 - Funds for travel to Utah Museums Association conference (\$350), American Association for State & Local History Annual Conference for Field Services meeting (\$1,200)
- Utah Field Services Providers (Ortiz, Johnson, van Frank). Total: \$5,400
 - Travel for two-part workshops in Region I for one admin January/February 2022, April/May 2022, July/August 2022, October/November 2022 (350 per trip x 8 trips in Year II =\$2,800) **COST SHARE:** funds for remaining 2 admin for travel: \$2,800 x 2 admin= \$5,600
 - Community Preservation Team mid-term meeting Spring 22 (\$350 x 3 admin= \$1,050)
 - Funds for travel for one admin to the Utah Museums Association conference (\$350)
COST SHARE: Funds for remaining two admin to attend UMA conference= \$350 x 2 admin= \$700
 - Funds for travel for one admin for the American Association for State & Local History Annual Conference for Field Services meeting (\$1,200). **COST SHARE:** Funds for remaining 2 admin to travel to AASLH= \$1,200 x 2 admin= \$2,400

Year III Total: \$11,885 | COST SHARE: \$10,800

- Preservation Outreach Coordinator. Total: \$5,435
 - Travel for two part workshops in Region II: January/February 2023, April/May 2023, July/August 2023, October/November 2023 (\$350 per trip x 8 trips in Year III =\$2,800)
 - Community Preservation Team mid-term meeting Spring 23 (\$350)
 - Preservation Assessments in partnership with CPT Fall/Winter 23 (\$150/trip x 7 organizations=\$1,050)
 - Travel to Utah Museums Association conference (\$350)
 - American Association for State & Local History Annual Conference for Field Services meeting (\$1,200)

- Utah Field Services Providers (Ortiz, Johnson, van Frank). Total: \$6,450
 - Travel for two part workshops in Region II for one admin: January/February 2023, April/May 2023, July/August 2023, October/November 2023 (\$350 per trip x 8 trips in Year II = \$2,800) **COST SHARE:** Funds for remaining 2 admin to travel = \$2,800 x 2 admin = \$5,600
 - Community Preservation Team mid-term meeting Spring 23 for three admin (\$350/trip x 3 admin = \$1,050)
 - Preservation Assessments travel funds for one admin: Fall/Winter 23 (\$150/trip x 7 organizations = \$1,050) **COST SHARE:** Funds for remaining 2 admin to travel = \$1,050 x 2 admin = \$2,100
 - Travel to Utah Museums Association conference (\$350) **COST SHARE:** Funds for remaining two admin to travel to UMA conference = \$350 x 2 admin = \$700
 - American Association for State & Local History Annual Conference for Field Services meeting (\$1,200). **COST SHARE:** Funds for remaining 2 admin to travel to AASLH = \$2,400

PARTICIPANT/TRAINEE SUPPORT COSTS:

Tuition/Fees/Health Insurance: **Leave Blank**

Stipends/Scholarships Total FOR THREE YEARS: \$42,200

Year I Total: \$0

Year II Total: \$38,600

- Scholarship funds available for eligible participants in the in-person workshops Region I January/February 2022, April/May 2022, July/August 2022, October/November 2022. Funds made available will be prioritized based off of need, distance to workshop location, and increasing the diversity of the attendance pool. (\$150/scholarship x 8 workshops x 3 people each workshop = \$3,600)
- Project Stipends for on-site collections project work with Community Preservation Team: Funds available for all 7 participant organizations to work on projects in their organization alongside the Preservation Outreach Coordinator. These funds will be available starting in Year II and bleed into project Year III. (7 organizations @ \$5,000 each = \$35,000 total)

Year III Total: \$3,600

- Scholarship funds available for eligible participants in the in-person workshops Region II: January/February 2023, April/May 2023, July/August 2023, October/November 2023. Funds made available will be prioritized based off of need, distance to workshop location, and increasing the diversity of the attendance pool. (\$150/scholarship x 8 workshops = \$3,600)

Travel Total FOR THREE YEARS: \$17,255

In-person opportunities require funding for state mileage due to the large distances in Utah and the dispersed nature of professional development opportunities. All mileage reimbursement rates will be calculated based on the GSA rate of \$0.57.5 cents per mile, rounded up to \$0.58 per mile.

Year I. Total: \$1,015

- State Mileage for 7 Community Preservation Team members for September 2021 Orientation Meeting will allow for guaranteed attendance at all in-person workshops. (7 CPT members @ 0.58 cents per mile @ 250 miles round trip = \$1,015)

Year II. Total: \$10,150

- State Mileage for 7 Community Preservation Team members for March 2022 Mid-term Meeting will allow for guaranteed attendance at all in-person workshops. (7 CPT members @ .58 cents per mile @ 250 miles round trip = \$1,015)
- State Mileage for 7 Community Preservation Team members will allow for guaranteed attendance at all in-person 2022 regional workshops. (7 CPT members @ .58 cents per mile @ 250 miles round trip x 8 in-person workshops = \$8,120)
- State Mileage for 7 Community Preservation Team members for September 2022 Utah Museum Association Annual Conference will allow for guaranteed attendance at all in-person workshops. (7 CPT members @ .58 cents per mile @ 250 miles round trip = \$1,015)

Year III. Total: \$6,090

- State Mileage for 7 Community Preservation Team members for March 2023 Mid-term Meeting will allow for guaranteed attendance at all in-person workshops. (7 CPT members @ .58 cents per mile @ 250 miles round trip = \$1,015)
- Contingency funding for State Mileage for 7 Community Preservation Team members will allow for guaranteed attendance at all in-person workshops (for any make-up needs for CPT participants). (Half of this will be allocated assuming many CPT members will join workshops in Year II: 7 CPT members @ .58 cents per mile @ 250 miles round trip x 8 in person workshops = \$4,060)
- State Mileage for 7 Community Preservation Team members for Utah Museum Association Annual Conference will allow for guaranteed attendance at all in-person workshops. (7 CPT members @ .58 cents per mile @ 250 miles round trip = \$1,015)

Subsistence. Total FOR THREE YEARS: \$10,664

Year I. Total: \$2,888

- Catering for the Orientation Meeting for Community Preservation Team (7 people) and administrators (Preservation Outreach Coordinator plus Utah Field Services team) in Fall 21: (11 individuals lunch at state per diem Total = \$200)
- Lodging/Incidentals/Meals for Community Preservation Orientation meeting (7 CPT members @ \$150/night @ 2 nights= \$2,100 plus state per diem for two days \$42/day x 2 days x 7 CPT members = \$588) Total=\$2,688

Year II. Total: \$3,888

- Snacks/drinks for four, two-part workshop series for approximately 25 people (8 workshops total) = \$1,000 (\$5/person @ state per diem)
- Catering for the Community Preservation Team meeting and administrators (Preservation Outreach Coordinator plus Utah Field Services team) in Fall 21: (11 individuals lunch at state per diem Total= \$200)
- Lodging/Incidentals/Meals for Community Preservation Orientation meeting (7 CPT members @ \$150/night @ 2 nights= \$2,100 plus state per diem for two days \$42/day x 2 days x 7 CPT members = \$588) Total=\$2,688

Year III. Total: \$3,888

- Snacks/drinks for four, two part workshop series for approximately 25 people (8 workshops total)= \$1,000 (\$5/person @ state per diem)
- Catering for the Community Preservation Team meeting and administrators (Preservation Outreach Coordinator plus Utah Field Services team) in Fall 21: (11 individuals lunch at state per diem= \$200
- Lodging/Incidentals/Meals for Community Preservation Orientation meeting (7 CPT members @ \$150/night @ 2 nights= \$2,100 plus state per diem for two days \$42/day x 2 days x7 CPT members =\$588) Total=\$2,688

OTHER

Other Direct Costs: Total FOR THREE YEARS: (b) (6) | **COST SHARE:** (b) (6)

Materials and Supplies. Total: \$2,700 | COST SHARE: \$720

- **COST SHARE:** [Zoom Pro account subscription](#) for online workshops (\$14.99/month for two hosts= \$360 year x 2 project years= \$720 total)
- Miscellaneous supplies (archival materials, etc.) @ \$900/year for three project years= \$2,700

Publication Costs. Total: \$11,600

- Printing materials costs for 8 workshops/year @ 20 participants and 4 admin: Year I: \$500 Year II: \$1,000 Year III: \$1,000 Total=\$2,500
- Utah Field Services website development: website where resources from all state field services providers will be collated, providing a one-stop-shop for users. Development will happen in Year I with subsequent years needing additional tech support. Year I: \$1,500 Year II: \$1,500 Year III: \$1,500 Total: \$4,500
- Utah Field Services list-serv: a listserv will be developed in Year I and continue through all project years to provide uniform communication to all CPT members and the larger field services community in Utah. Total: \$1,000 one time
- Advertising collateral for the program includes printed fliers, postcards, postage, digital ads for social media to spread awareness of the programmatic opportunities. Year I: \$1,200 Year II: \$1,200 Year III: \$1,200 Total: \$3,600

Consultant Services. Total FOR THREE YEARS: (b) (6)

Evaluation Consultant

- Kari Ross Nelson, an independent evaluator to conduct formative and summative evaluation on all three project years. Year I: (b) (6) Year II: (b) (6) Year III: (b) (6) Total: (b) (6)
- ADP/Computer Services: N/A

Sub-awards/Consortium/Contracts. Total: \$16,000

Instructor fees

- We intend to engage additional instructors to assist with facilitating in-person and online workshops over the course of the two implementation project years. When this happens, we will pay the Utah Field Services instructor rate of \$50/hour.
Year I: \$0
Year II: 4 potentials instructors @ 40 hours/per instructor = 200 hrs= \$8,000

Year III: 4 potential instructors @ 40 hours/per instructor = 200 hrs=\$8,000

Equipment or Facility Use/User Fees. Total: \$0 | COST SHARE \$5,700

- **COST SHARE:** Facility Rentals include space for in-person Regional Workshops and Community Preservation Team meetings in Years I-III
 - In-person workshop facilities for Years II-III. (3 CPT meetings, 16 total workshops over two project years =19 total) 19 facility rentals @ \$300 per rental = \$5,700

Project Income: Total is reflected as COST SHARE FOR THREE YEARS: \$3,200

- A minimal charge will be set for in-person regional workshops to ensure “skin in the game” and that attendees show up to the workshops. Previous experience with minimal charges for workshops has proven successful for Utah Field Services.
 - Year I: \$0
 - Year II: 4 sets of two-part workshops @ \$20 per set x 20 people per set =\$1,600
 - Year III: 4 sets of two-part workshops @ \$20 per set x 20 people per set =\$1,600

Alterations/Renovations: N/A

TOTAL DIRECT COSTS: \$347,604.00

TOTAL COST SHARE: \$168,059.00

TOTAL PROJECT COST: \$ 515,663.00

Indirect Costs: \$0 N/A--the State of Utah does not take an indirect percentage cut of federal grant requests.

YEAR 1	Amount	Justification
Other Personnel Salaries/Wages		
Temporary Labor:		
Preservation Outreach Coordinator	\$ (b) (6)	1 FT Temporary Labor @ (b) (6) annual salary
Total Salaries/Wages	\$ (b) (6)	
Other Personnel Fringe Benefits	\$ (b) (6)	Calculated at 25% of their salary as per State of Utah
Total Fringe Benefits		
Equipment	\$ -	
Total Equipment	\$ -	
Domestic Travel		
Preservation Outreach Coordinator	\$ 3,400.00	Frontier Site visits to museums off the Wasatch Front (\$150/trip x 6 trips=\$900) + Preservation Assessments with first half of the Community Preservation Team (CPT) sites (\$150/trip x 4 trips = \$600) + Orientation meeting for CPT sites in Fall 21 (\$350) + funds for travel to Utah Museums Association conference (\$350) + American Association for State & Local History Annual Conference for Field Services meeting (\$1,200)
Utah Field Services Providers (Ortiz, Johnson, van Frank).	\$ 3,500.00	Orientation meeting for CPT sites in Fall 21 (\$350 x 3 admin=1,050), site visits to museums off the Wasatch Front for one admin (\$150/trip x 6 trips=\$900), funds for travel for one admin to the Utah Museums Association conference (\$350), funds for travel for one admin for the American Association for State & Local History Annual Conference for Field Services meeting (\$1,200)
Total Travel	\$ 6,900.00	
Participant Trainee Costs		
Tuition/Health Insurance	\$ -	
Scholarships	\$ -	
Participant Travel	\$ 1,015.00	State Mileage for 7 Community Preservation Team members for Orientation Meeting will allow for guaranteed attendance at all in-person workshops. (7 CPT members @ .58 cents per mile @ 250 miles round trip = \$1,015)
Subsistence	\$ 2,888.00	Catering for the Orientation Meeting for Community Preservation Team (7 people) and administrators (Preservation Outreach Coordinator plus Utah Field Services team) in Fall 21: (11 individuals lunch at state per diem Total = \$200). Lodging/Incidentals/Meals for Community Preservation Orientation meeting (7 CPT members @ \$150/night @ 2 nights= \$2,100 plus state per diem for two days \$42/day x 2 days x7 CPT members =\$588) Total=\$2,688

Total Participant Trainee Costs	\$	3,903.00	
Other			
Materials and Supplies	\$	900.00	Please see budget justification document
Publication Costs: Printing	\$	500.00	Printing materials costs for 8 workshops/year @ 20 participants and 4 admin: Year I: \$500 Year II: \$1,000 Year III: \$1,000 Total=\$2,500
Publication Costs: Advertising Collateral	\$	1,200.00	Advertising collateral for the program includes printed fliers, postcards, postage, digital ads for social media to spread awareness of the programmatic opportunities. Year I: \$1,200 Year II: \$1,200 Year III: \$1,200 Total: \$3,600
Publication Costs: website	\$	1,500.00	Please see budget justification document
Publication Costs: listserve	\$	1,000.00	One time, see budget justification
Consultant Services/Evaluation	\$	(b) (6)	Kari Ross Nelson, an independent evaluator to conduct formative and summative evaluation on all three project years. Total: (b) (6)
ADP/Computer Services	\$	-	
Sub-awards/Consortium/Contracts: Instructor Fees	\$	-	We intend to engage additional instructors to assist with facilitating in-person and online workshops over the course of the two implementation project years. When this happens, we will pay the Utah Field Services instructor rate at \$50/hour. Year I: \$0 Year II: 4 potential instructors @ 40 hours/per instructor = 200 hrs= 8,000. Year III: \$8,000
Alterations/Renovations	\$	-	
Total Other	\$	(b) (6)	
TOTAL DIRECT COSTS. YEAR I	\$	88,403.00	
COST SHARE			
Domestic Travel for Utah Field Services (Johnson, Ortiz, van Frank)	\$	4,900.00	Please see budget justification document
Materials and Supplies (Zoom)	\$	360.00	Please see budget justification document
Equipment or Facility Use/User Fees	\$	1,900.00	Facility Rentals include space for Community Preservation Team meetings in Years 1-III, in-person workshop facilities for Years II-III. (3 CPT meetings, 16 total workshops over two project years =19 total) 19 facility rentals @ \$300 per rental = \$5,700--this is reflected in COST SHARE
Project income	\$	-	There will be project income in Year II and Year III to account for that will be reflected as COST SHARE. Please see budget justification document for more information
Total Program Cost Share:	\$	7,160.00	
Permanent Staff Salaries & Fringe Benefits			
Jennifer	\$	(b) (6)	Year I: (b) (6), (b) (6)
Emily	\$	(b) (6)	Year I: (b) (6), (b) (6)
Megan	\$	(b) (6)	Year I

TOTAL Staff Salaries & Fringe	\$	39,070.10	
TOTAL COST SHARE. YEAR I	\$	50,630.10	Totals from program cost share in addition to staff salaries and benefits

YEAR II	Amount	Justification
Other Personnel Salaries/Wages		
Temporary Labor:		
Preservation Outreach Coordinator	\$ (b) (6)	1 FT Temporary Labor @ (b) (6) annual salary
Total Salaries/Wages	\$ (b) (6)	
Other Personnel Fringe Benefits	\$ (b) (6)	Calculated at 25% of their salary as per State of Utah
Total Fringe Benefits		
Equipment	\$ -	
Total Equipment	\$ -	
Domestic Travel		
Preservation Outreach Coordinator	\$ 5,500.00	Travel for two part workshops in Region I January/February 2022, April/May 2022, July/August 2022, October/November 2022 (\$350 per trip x 8 trips in Year II =\$2,800). Community Preservation Team mid-term meeting Spring 22 (\$350), Preservation Assessments with second half of the Community Preservation Team (CPT) sites (\$150/trip x 3 trips = \$450). Funds for travel to Utah Museums Association conference (\$350), American Association for State & Local History Annual Conference for Field Services meeting (\$1,200).
Utah Field Services Providers (Ortiz, Johnson, van Frank).	\$ 5,400.00	Travel for two part workshops in Region I for one admin January/February 2022, April/May 2022, July/August 2022, October/November 2022 (350 per trip x 8 trips in Year II =\$2,800). Community Preservation Team mid-term meeting Spring 22 (\$350 x 3 admin= \$1,050). Funds for travel for one admin to the Utah Museums Association conference (\$350). Funds for travel for one admin for the American Association for State & Local History Annual Conference for Field Services meeting (\$1,200).
Total Travel	\$ 10,900.00	
Participant Trainee Costs		
Tuition/Health Insurance	\$ -	
Scholarships	\$ 3,600.00	Scholarship funds available for eligible participants in the in-person workshops Region I January/February 2022, April/May 2022, July/August 2022, October/November 2022. Funds made available will be prioritized based off of need, distance to workshop location, and increasing the diversity of the attendance pool. (\$150/scholarship x 8 workshops x 3 people each workshop = \$3,600)
Stipends	\$ 35,000.00	Project Stipends for on-site collections work with Collections Preservation Team: Funds available for all 7 participant organizations to work on project in their organization alongside the Preservation Outreach Coordinator. These funds will be available starting in Year II and bleed into project Year III. (7 organizations @ \$5,000 each= \$35,00 over Years II/III)

Participant Travel	\$ 10,150.00	State Mileage for 7 Community Preservation Team members for Orientation Meeting will allow for guaranteed attendance at all in-person workshops. (7 CPT members @ .58 cents per mile @ 250 miles round trip). State Mileage for 7 Community Preservation Team members will allow for guaranteed attendance at all in-person workshops. (7 CPT members @ .58 cents per mile @ 250 miles round trip x 8 in person workshops = \$10,150). State Mileage for 7 Community Preservation Team members for Utah Museum Association Annual Conference will allow for guaranteed attendance at all in-person workshops. (7 CPT members @ .58 cents per mile @ 250 miles round trip = \$1,015)
Subsistence	\$ 3,888.00	Snacks/drinks for four, two-part workshop series for approximately 25 people (8 workshops total) = \$1,000 (\$5/person @ state per diem). Catering for the Community Preservation Team meeting and administrators (Preservation Outreach Coordinator plus Utah Field Services team) in Fall 21: (11 individuals lunch at state per diem Total= \$200). Lodging/Incidentals/Meals for Community Preservation Orientation meeting (7 CPT members @ \$150/night @ 2 nights= \$2,100 plus state per diem for two days \$42/day x 2 days x7 CPT members =\$588) Total=\$2,688
Total Participant Trainee Costs	\$ 52,638.00	
Other		
Materials and Supplies	\$ 900.00	See budget justification document
Publication Costs: Printing	\$ 1,000.00	Printing materials costs for 8 workshops/year @ 20 participants and 4 admin: Year I: \$500 Year II: \$1,000 Year III: \$1,000 Total=\$2,500
Publication Costs: Advertising Collateral	\$ 1,200.00	Advertising collateral for the program includes printed fliers, postcards, postage, digital ads for social media to spread awareness of the programmatic opportunities. Year I: \$1,200 Year II: \$1,200 Year III: \$1,200 Total: \$3,600
Publication Costs: website	\$ 1,500.00	Please see budget justification document
Consultant Services/Evaluation	\$ (b) (6)	Kari Ross Nelson, an independent evaluator to conduct formative and summative evaluation on all three project years. Total: (b) (6)
ADP/Computer Services	\$ -	
Sub-awards/Consortium/Contracts: Instructor Fees	\$ 8,000.00	We intend to engage additional instructors to assist with facilitating in-person and online workshops over the course of the two implementation project years. When this happens, we will pay the Utah Field Services instructor rate at \$50/hour. Year I: \$0 Year II: 4 potential instructors @ 40 hours/per instructor = 200 hrs=\$8,000. Year III: \$8,000
Alterations/Renovations	\$ -	
Total Other	\$ (b) (6)	
TOTAL DIRECT COSTS. YEAR II	\$ 148,638.00	
COST SHARE		
Domestic Travel for Utah Field Services (Johnson, Ortiz, van Frank)	\$ 8,700.00	Please see budget justification document
Materials and Supplies	\$ 360.00	Please see budget justification document

Equipment or Facility Use/User Fees	\$ 1,900.00	Facility Rentals include space for Community Preservation Team meetings in Years I-III, in-person workshop facilities for Years II-III. (3 CPT meetings, 16 total workshops over two project years =19 total) 19 facility rentals @ \$300 per rental = \$5,700--this is reflected in COST SHARE
Project income	\$ 1,600.00	There will be project income in Year II and Year III to account for that will be reflected as COST SHARE. Please see budget justification document for more information
Total Program Cost Share:	\$ 12,560.00	
Permanent Staff Salaries & Fringe Benefits		
<i>Jennifer</i>	\$ (b) (6)	See budget justification document
<i>Emily</i>	\$ (b) (6)	See budget justification document
<i>Megan</i>	\$ (b) (6)	See budget justification document
TOTAL Staff Salaries & Fringe	\$ 39,803.00	
TOTAL COST SHARE. YEAR II	\$ 55,763.00	Totals from program cost share in addition to staff salaries and benefits

YEAR III	Amount	Justification
Other Personnel Salaries/Wages		
<i>Temporary Labor:</i>		
Preservation Outreach Coordinator	\$ (b) (6)	1 FT Temporary Labor @ (b) (6) annual salary
Total Salaries/Wages	\$ (b) (6)	
Other Personnel Fringe Benefits	\$ (b) (6)	Calculated at 25% of their salary as per State of Utah
Total Fringe Benefits		
Equipment	\$ -	
Total Equipment	\$ -	
Domestic Travel		
Preservation Outreach Coordinator	\$ 5,435.00	Travel for two part workshops in Region II: January/February 2023, April/May 2023, July/August 2023, October/November 2023 (\$350 per trip x 8 trips in Year III =\$2,800). Community Preservation Team mid-term meeting Spring 23 (\$350). Preservation Assessments in partnership with CPT Fall/Winter 23 (\$150/trip x 7 organizations=\$1,050). Travel to Utah Museums Association conference (\$350). American Association for State & Local History Annual Conference for Field Services meeting (\$1,200).
Utah Field Services Providers (Ortiz, Johnson, van Frank).	\$ 6,450.00	Travel for two part workshops in Region II for one admin: January/February 2023, April/May 2023, July/August 2023, October/November 2023 (\$350 per trip x 8 trips in Year II =\$2,800). Community Preservation Team mid-term meeting Spring 23 for three admin (\$350/trip x 3 admin=\$1,050). Preservation Assessments travel funds for one admin: Fall/Winter 23 (\$150/trip x 7 organizations=\$1,050). Travel to Utah Museums Association conference (\$350). American Association for State & Local History Annual Conference for Field Services meeting (\$1,200)
Total Travel	\$ 11,885.00	
Participant Trainee Costs		
Tuition/Health Insurance	\$ -	
Scholarships	\$ 3,600.00	Scholarship funds available for eligible participants in the in-person workshops Region II: January/February 2023, April/May 2023, July/August 2023, October/November 2023. Funds made available will be prioritized based off of need, distance to workshop location, and increasing the diversity of the attendance pool. (\$150/scholarship x 8 workshops = \$3,600)

Stipends	\$ -	Project Stipends for on-site collections work with Collections Preservation Team: Funds available for all 7 participant organizations to work on project in their organization alongside the Preservation Outreach Coordinator. These funds will be available starting in Year II and bleed into project Year III. (7 organizations @ \$5,00 each= \$35,000 total). The distribution of these funds are reflected in Year II accordingly.
Participant Travel	\$ 6,090.00	Contingency funds to ensure all CPT members who do not meet the required workshop sections in Year II that they meet the requirement with travel in Year III. This number is reflective of half of what is allocated for Year II CPT travel. See budget justification for additional information.
Subsistence	\$ 3,888.00	Snacks/drinks for four, two-part workshop series for approximately 25 people (8 workshops total) = \$1,000 (\$5/person @ state per diem). Catering for the Community Preservation Team meeting and administrators (Preservation Outreach Coordinator plus Utah Field Services team) in Fall 21: (11 individuals lunch at state per diem Total= \$200). Lodging/Incidentals/Meals for Community Preservation Orientation meeting (7 CPT members @ \$150/night @ 2 nights= \$2,100 plus state per diem for two days \$42/day x 2 days x7 CPT members =\$588) Total=\$2,688
Total Participant Trainee Costs	\$ 13,578.00	
Other		
Materials and Supplies	\$ 900.00	See budget justification document
Publication Costs: Printing	\$ 1,000.00	Printing materials costs for 8 workshops/year @ 20 participants and 4 admin: Year I: \$500 Year II: \$1,000 Year III: \$1,000 Total=\$2,500
Publication Costs: Advertising Collateral	\$ 1,200.00	Advertising collateral for the program includes printed fliers, postcards, postage, digital ads for social media to spread awareness of the programmatic opportunities. Year I: \$1,200 Year II: \$1,200 Year III: \$1,200 Total: \$3,600
Publication Costs: website	\$ 1,500.00	Please see budget justification document
Consultant Services/Evaluation	\$ (b) (6)	Kari Ross Nelson, an independent evaluator to conduct formative and summative evaluation on all three project years. Total: (b) (6)
ADP/Computer Services	\$ -	
Sub-awards/Consortium/Contracts: Instructor Fees	\$ 8,000.00	We intend to engage additional instructors to assist with facilitating in-person and online workshops over the course of the two implementation project years. When this happens, we will pay the Utah Field Services instructor rate at \$50/hour. Year I: \$0 Year II: 4 potential instructors @ 40 hours/per instructor = 200 hrs=\$8,000. Year III: \$8,000
Alterations/Renovations	\$ -	
Total Other	\$ (b) (6)	

TOTAL DIRECT COSTS. YEAR III	\$ 110,563.00	
COST SHARE		
Domestic Travel for Utah Field Services (Johnson, Ortiz, van Frank)	\$ 10,800.00	Please see budget justification document
Materials and Supplies	\$ 360.00	Please see budget justification document
Equipment or Facility Use/User Fees	\$ 1,900.00	Facility Rentals include space for Community Preservation Team meetings in Years 1-III, in-person workshop facilities for Years II-III. (3 CPT meetings, 16 total workshops over two project years =19 total) 19 facility rentals @ \$300 per rental = \$5,700--this is reflected in COST SHARE
Project income	\$ 1,600.00	There will be project income in Year II and Year III to account for that will be reflected as COST SHARE. Please see budget justification document for more information
Total Program Cost Share:	\$ 14,660.00	
Permanent Staff Salaries & Fringe Benefits		
Jennifer	\$ (b) (6)	Year III: (b) (6), (b) (6)
Emily	\$ (b) (6)	Year III: (b) (6), (b) (6)
Megan	\$ (b) (6)	Year III total
TOTAL Staff Salaries & Fringe	\$ 40,552.00	
TOTAL COST SHARE. YEAR III	\$ 58,612.00	

Combined	Amount	Justification
Other Personnel Salaries/Wages		
Temporary Labor:		
Preservation Outreach Coordinator	\$ (b) (6)	1 FT Temporary Labor @ (b) (6) annual salary
Total Salaries/Wages	\$ (b) (6)	
Other Personnel Fringe Benefits	\$ (b) (6)	Calculated at 25% of their salary as per State of Utah
Total Fringe Benefits		
Equipment	\$ -	
Total Equipment	\$ -	
Domestic Travel		
Preservation Outreach Coordinator	\$ 14,335.00	Travel for two part workshops in Region II: January/February 2023, April/May 2023, July/August 2023, October/November 2023 (\$350 per trip x 8 trips in Year III =\$2,800). Community Preservation Team mid-term meeting Spring 23 (\$350). Preservation Assessments in partnership with CPT Fall/Winter 23 (\$150/trip x 7 organizations=\$1,050). Travel to Utah Museums Association conference (\$350). American Association for State & Local History Annual Conference for Field Services meeting (\$1,200).
Utah Field Services Providers (Ortiz, Johnson, van Frank).	\$ 15,350.00	Travel for two part workshops in Region II for one admin: January/February 2023, April/May 2023, July/August 2023, October/November 2023 (\$350 per trip x 8 trips in Year II =\$2,800). Community Preservation Team mid-term meeting Spring 23 for three admin (\$350/trip x 3 admin=\$1,050). Preservation Assessments travel funds for one admin: Fall/Winter 23 (\$150/trip x 7 organizations=\$1,050). Travel to Utah Museums Association conference (\$350). American Association for State & Local History Annual Conference for Field Services meeting (\$1,200)
Total Travel	\$ 29,685.00	
Participant Trainee Costs		
Tuition/Health Insurance	\$ -	
Scholarships	\$ 7,200.00	Scholarship funds available for eligible participants in the in-person workshops Region II: January/February 2023, April/May 2023, July/August 2023, October/November 2023. Funds made available will be prioritized based off of need, distance to workshop location, and increasing the diversity of the attendance pool. (\$150/scholarship x 8 workshops = \$3,600)

Stipends	\$ 35,000.00	Project Stipends for on-site collections work with Collections Preservation Team: Funds available for all 7 participant organizations to work on project in their organization alongside the Preservation Outreach Coordinator. These funds will be available starting in Year II and bleed into project Year III. (7 organizations @ \$5,000 each= \$35,000 total)
Participant Travel	\$ 17,255.00	State Mileage for 7 Community Preservation Team members for Orientation Meeting will allow for guaranteed attendance at all in-person workshops. (7 CPT members @ .58 cents per mile @ 250 miles round trip = \$1015). State Mileage for 7 Community Preservation Team members will allow for guaranteed attendance at all in-person workshops. (7 CPT members @ .58 cents per mile @ 250 miles round trip x 8 in person workshops = \$10150). State Mileage for 7 Community Preservation Team members for Utah Museum Association Annual Conference will allow for guaranteed attendance at all in-person workshops. (7 CPT members @ .58 cents per mile @ 250 miles round trip = \$1015)
Subsistence	\$ 10,664.00	Snacks/drinks for four, two-part workshop series for approximately 25 people (8 workshops total) = \$1,000 (\$5/person @ state per diem). Catering for the Community Preservation Team meeting and administrators (Preservation Outreach Coordinator plus Utah Field Services team) in Fall 21: (11 individuals lunch at state per diem Total= \$200). Lodging/Incidentals/Meals for Community Preservation Orientation meeting (7 CPT members @ \$150/night @ 2 nights= \$2,100 plus state per diem for two days \$42/day x 2 days x7 CPT members =\$588) Total=\$2,688
Total Participant Trainee Costs	\$ 70,119.00	
Other		
Materials and Supplies	\$ 2,700.00	See budget justification
Publication Costs: Printing	\$ 2,500.00	Printing materials costs for 8 workshops/year @ 20 participants and 4 admin: Year I: \$500 Year II: \$1,000 Year III: \$1,000 Total=\$2,500
Publication Costs: Advertising Collateral	\$ 3,600.00	Advertising collateral for the program includes printed fliers, postcards, postage, digital ads for social media to spread awareness of the programmatic opportunities. Year I: \$1,200 Year II: \$1,200 Year III: \$1,200 Total: \$3,600
Publication Costs	\$ 5,500.00	Website and listserve. Please see budget justification document
Consultant Services/Evaluation	\$ (b) (6)	Kari Ross Nelson, an independent evaluator to conduct formative and summative evaluation on all three project years. Total: (b) (6)
ADP/Computer Services	\$ -	
Sub-awards/Consortium/Contracts: Instructor Fees	\$ 16,000.00	We intend to engage additional instructors to assist with facilitating in-person and online workshops over the course of the two implementation project years. When this happens, we will pay the Utah Field Services instructor rate at \$50/hour. Year I: \$0 Year II: 4 potential instructors @ 40 hours/per instructor = 200 hrs=\$8,000. Year III: \$8,000
Alterations/Renovations	\$ -	
Total Other	\$ (b) (6)	

TOTAL DIRECT COSTS (GRANT REQUEST)	\$ 347,604.00	
COST SHARE		
Domestic Travel for Utah Field Services (Johnson, Ortiz, van Frank)	\$ 24,400.00	Please see budget justification document
Materials and Supplies	\$ 720.00	Please see budget justification document
Equipment or Facility Use/User Fees	\$ 5,700.00	Facility Rentals include space for Community Preservation Team meetings in Years I-III, in-person workshop facilities for Years II-III. (3 CPT meetings, 16 total workshops over two project years =19 total) 19 facility rentals @ \$300 per rental = \$5,700--this is reflected in COST SHARE
Project income	\$ 3,200.00	There will be project income in Year II and Year III to account for that will be reflected as COST SHARE. Please see budget justification document for more information
Total Program Cost Share:	\$ 34,020.00	
<i>Jennifer</i>	\$ (b) (6)	Totals from Years I, II, III
<i>Emily</i>	\$ (b) (6)	Totals from Years I, II, III
<i>Megan</i>	\$ (b) (6)	Totals from Years I, II, III
TOTAL Staff Salaries & Fringe	\$ 134,039.00	
TOTAL COST SHARE	\$ 168,059.00	48%
TOTAL PROJECT COSTS	\$ 515,663.00	