

# Museum Assessment Program

## Organizational Assessment Final Report 2011

AMERICAN  ASSOCIATION OF MUSEUMS

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Congratulations on the hard work you have put into completing MAP!

Enclosed is your final assessment report from your peer reviewer. I hope that you will find the report's content helpful to your organization as you move towards best practices and meeting national standards. Your peer reviewer has written a set of recommendations and resources that will hopefully provide you with the direction and insight that you were seeking through the Museum Assessment Program.

In addition to your report, MAP staff has also included a grant proposal writing guide and a list of state specific resources to help you implement your MAP report. We hope that these materials will supplement your other MAP resources, including access to the AAM Information Center, AAM 2010 and 2011 on-demand Museum Essentials Webinar series, and your MAP bookshelf. Remember that you can access the AAM Information Center through the rest of the year by using the username and password: **mapee11**. You can also contact them directly at [infocenter@aam-us.org](mailto:infocenter@aam-us.org) with questions and for sample documents. Please mention that you are a MAP participant. *This benefit can be extended through AAM Institutional Membership.*

Your peer reviewer is another wonderful resource. This relationship should not end now that you've received your report. Feel free to contact your reviewer to discuss your report and next steps. You can also consult MAP staff with any questions at 202-289-9118 or [map@aam-us.org](mailto:map@aam-us.org).

Thank you for participating in MAP, and we hope to work together again.

Kind Regards,



Jill Connors-Joyner  
Assistant Director, Museum Assessment Program

# Museum Assessment Program Report

for the

Harwood Museum of Art  
University of New Mexico  
Taos, New Mexico

Visit August 24 and 25, 2011

## Museum Assessment Program Organizational Assessment Report

Harwood Museum of Art  
University of New Mexico  
Taos, NM

### **INTRODUCTION**

The Museum Assessment Program (MAP) is a national, voluntary program which helps museums strengthen operations, plan for the future and meet standards through self-study and a consultative site visit from an expert peer reviewer. The reviewer, Lorne E. Render, Director Emeritus, Marianna Kistler Beach Museum of Art, Kansas State University, Manhattan, Kansas, visited the Harwood Museum of Art on August 24 and 25, 2011. During the two day visit, sessions were held with staff, board members, and volunteers. Attached is the agenda for the visit with the names of those who attended sessions. The reviewer would like to thank all those he met for their willingness to answer questions and provide information. The cooperation was very much appreciated. In summary, the reviewer was impressed with the dedication and passion of everyone and their commitment to the museum and their community. It is clear that the museum has positioned itself through its outstanding regional art collection and its excellent exhibitions and educational programs to be a key resource to Taos and surrounding area, to the University of New Mexico, and to the state.

The mission of the Harwood Museum of Art adopted January 2010 is:  
The mission of the Harwood Museum of Art of the University of New Mexico is to collect, preserve, exhibit, and interpret the arts, especially those created in, inspired by, or relevant to northern New Mexico. The museum advances the University's mission and engages diverse audiences by stimulating learning, creativity, and research through exhibitions, programs, and publications.

The Harwood Museum of Art outlined three objectives for the MAP assessment that were confirmed in discussions with the assessment team:

- a) To assess the Harwood Museum of Art's readiness to apply for American Association of Museums accreditation. AAM accreditation is a high priority for the museum, and we hope that the MAP assessment will position us to achieve that goal within the next three years.
- b) To ensure that recent organizational changes at the Harwood Museum of Art, including those directed by the museum's strategic plan, are aligned with best practices in the art museum field.
- c) To increase staff and Governing Board members' knowledge of museum standards and best practices.

This report will outline observations and make recommendations on the operations of the museum for consideration by the Governing Board and staff. The reviewer would be pleased to address or clarify any issues discussed.

## **EXECUTIVE SUMMARY**

In this report are recommendations; however, the reviewer would like to specifically address the three MAP objectives. The first objective was the question of whether the Harwood Museum of Art was prepared to apply for American Association of Museums accreditation. The reviewer believes the museum is in a position to apply. The majority of accreditation issues are already addressed with best practices are in

place. Although – as will be discussed in this report – some areas do require attention. These areas of improvement can be completed within the next year.

The second objective is whether the recent organizational changes are aligned with best practices in the field. The reviewer thought that they generally were aligned and that an effective management team was in place. It was also apparent that a new institutional “culture” has been created at the museum, a positive change. It is noted, however, that the titles for some of the positions are not the usual titles used in the museum field, and it would be preferable to have similar position titles that are found in other art museums. This will be discussed further in the Administration and Finance section.

The third objective is to increase the knowledge of board members and staff about best practices in the museum field. This will be an ongoing process. An institutional policy and a plan addressing professional development and training for staff, boards, and volunteers should be developed and become a standing item in the strategic plan. This is discussed further in the Administration and Finance section.

## **BRIEF INSTITUTIONAL HISTORY**

The Harwood Museum of Art is an established institution with a significant and excellent collection. Founded by Burt and Elizabeth Harwood as a private residence, it has grown over the years. It began offering exhibitions in 1924 and a library opened in 1926 both received strong community support. In 1935 the Harwood Foundation was given to the University of New Mexico. Since that time the university has been the governing body and has provided core support. In 1937, an expansion was made to the Harwood building that maintained the adobe aesthetic of the earlier building. Since then

the museum has collected a wide range of New Mexico and Southwest art, including Native American, Hispanic, and Anglo works. The result is an outstanding collection. A wide range of exhibitions, educational programs, and publications have been offered to the public over the years gaining a local, regional, and national reputation. A significant change occurred in 2007 when the Board of Regents for the University of New Mexico established the Governing Board of the Harwood Foundation resulting in a transfer of governance. In 2010 an addition was made to the building that consisted of an auditorium, exhibition galleries, collection storage spaces, and curatorial work areas. The museum continues to enhance their role in the community and beyond, serving a diverse constituency effectively.

### **MISSION AND PLANNING**

The Harwood Museum of Art's mission statement mentioned at the beginning of this report was adopted in 2010. In formulating the mission statement, there was considerable discussion about the collecting function being regional while the exhibitions and educational and public programs were to be broader in scope. It was decided that a regional art emphasis would provide a focus to the collection, while at the same time the museum could offer art from throughout the world to Taos and the surrounding communities in order to broaden the scope of exhibition and educational opportunities. Some felt that this was ambiguous; however, the reviewer believes this approach is sound and is clearly articulated and successfully being implemented. The reviewer has seen this approach to different collecting and exhibitions and public programs policies successfully implemented at other academic art museums.

A five year strategic plan (2010-2015) was prepared in 2010 at the time of the arrival of the current Director. The Director, in fact, acted as the facilitator for the planning process that included representatives from the Governing Board, Advisory Council, Alliance Board, Director's Circle, and staff. The resulting document is extremely well done, stating specific goals, objectives, action steps, responsible personnel, time lines, and resources and funding needs. The status report clearly shows what has been accomplished and what has had to be modified due to specific circumstances. The nine goals emphasize institutional growth and in reviewing them, all are certainly achievable in the plan's timeframe. The plan is somewhat front-end loaded with a lot occurring during the first two years. In discussions, it was stated that this is indeed the case; however, a number of the action steps are activities being undertaken in the normal course of institutional improvements and not new activities.

The reviewer did question the lack of any goals or objectives related to the University of New Mexico as there were objectives related to growth and development within the community of Taos. The University of New Mexico is in the mission statement and it would seem appropriate to formulate a goal and/or objective(s) to recognize and strengthen the connection with the university. The museum is two and a half hours away from the main campus in Albuquerque; there is a branch University of New Mexico-Taos. This distance is substantial and could contribute to a lack of understanding about the operations of the Harwood Museum of Art by the University of New Mexico. The museum is considered a "crown jewel" by the university so it would seem attention should be paid to enhancing communication and connections with the main campus. There is certainly a need for the university to understand the great work

that is taking place at the Harwood Museum of Art and at the same time it would be helpful for the museum boards and staff to understand the pressures and priorities of the university. One very positive step is that there are three members from the senior leadership at the university on the Governing Board.

**Recommendations:**

It is recommended that the strategic plan be revisited to include a goal addressing how to strengthen the relationships, partnerships, and communication with the University of New Mexico. The museum is some distance from the main campus and this distance can be a barrier. It does seem to the reviewer that an institutional goal with short-term and long-term objectives would be helpful in integrating the museum into the culture and structure of the university.

**INTERPRETATION**

The Harwood Museum of Art's attendance has increased markedly over the last few years, and in the first six months of this calendar year, attendance has continued to increase. The opening of a new auditorium in 2010 has been a major contributor in this. The museum is presenting new programs, and similar organizations in Taos, such as story tellers and Native Americans, are using the space and bringing in new audiences to the museum. As a result the museum has increased its presence as a community resource. A great step.

Audience research has been identified in the strategic plan as an important need. This was confirmed in discussions with staff. The museum has primary audiences of school children, the general population of Taos and surrounding area, and tourists; however, a lack of audience research is making it difficult to target exhibitions and

programs and determine how to market the museum and best direct limited marketing dollars. Pursuing an audience research program would help address programmatic, marketing, and membership questions and guide the museum, particularly with the recent building expansion being such a strong new tool for community involvement.

The self-study identified the need to increase community support. Steps have been taken within the community that are positive. Attendance is up and membership has increased by about thirty percent. Visits from a neighboring school have all K-2 students come the museum each month during the school year, and during the summer the educational programs reach out to the Taos Housing Authority and a trailer park to under privileged children. Both are exceptional programs. The Director is involved with various community associations and organizations and has built strong relationships in the Taos community.

Programs at the Harwood Museum of Art are rich, varied, and extremely well done. The reviewer was very impressed with the range and type of educational programs and public programs being developed and offered. This is the result of a very creative staff and the opportunities that the new auditorium offers. The education staff are passionate about what they do and how they touch the lives of children and adults. When interviewing staff or board members, the reviewer always asks a last question, namely, if you could change one thing about the museum what would that be. The results are always interesting; however, the reviewer has to specifically mention one answer, although the person who gave this answer will not be identified other than to say it was not a staff member. This person said that Taos is a very fractured community. There is a veneer over the community, and just below the veneer are

elements competing, challenging each other, and arguing about issues of diversity, cultural differences, and economic constraints. It was said that the programs of bringing all of the K-2 students to the museum each month during the school year and the outreach programs of going to the Taos Housing Authority and the trailers, were of enormous help in penetrating that veneer and helping to heal the division within the community. This was an extremely powerful statement of what the Harwood Museum of Art is accomplishing – namely it is a healer and community builder. Without a doubt the Harwood Museum of Art is vital to the community and is an exceptional “neighbor.”

There is a tremendous amount of work undertaken by the education staff but the reviewer was concerned that there may be too much. It may be necessary to say “no” to some new ideas if it means adding to the current work load. A concern is that adding too many new programs may eventually lead to a decrease in the quality of the programs which are now so strong and innovative, not to mention staff burn-out. Careful evaluation of existing and proposed programs will be critical to the ongoing development of the educational program.

The exhibition program is very well done. Normally nine exhibitions, organized by the staff, are offered each year. Occasionally guest curators plan exhibitions. As well, there are regular changes to the permanent collection installations. This is a significant work load. The exhibition policy and the exhibition proposal form are very well done and clearly identify the focus of the program. The installations are professionally laid out and the works of art are easy to view and enjoy. When possible, written material is prepared and published. With the recent expansion a wonderful new temporary exhibition gallery is now available.

It would be helpful to give some consideration to making the text panels in all the galleries, including the tombstone labels, a little more reader friendly. This relates to point size as well as placement. The reviewer noticed a visitor on his knees reading a label to his wife as she could not read the low label. The need for more interpretive labels was noted in the self-study, with which the reviewer concurs. What is on view is so wonderful, that more interpretive information would enhance a person's visit.

Marketing is carried out by various line managers, as there is not one person on staff assigned this responsibility. While this was noted as working relatively well, there is a concern that consistency of information may vary. It also seems to the reviewer this is an added responsibility to the line managers who already have sufficient workloads. A marketing firm, Buzz, Inc., has been under contract but has recently relocated to Denver from Taos. Buzz, Inc. while in Taos worked well, and even with the relocation, there does continue to be some benefits for the museum. The difficulty is that once a marketing firm is outside the community, connections and feeling the pulse of the community will begin to diminish. This is one area consideration should be given to identifying a part-time or full time position, or a contract person or company residing in Taos.

**Recommendations:**

It is recommended that the museum continue to pursue securing the services of a company or individual to undertake audience research. The results of such work will help meet the needs of the museum, the interests of the community, and maximize the limited dollars available. Consideration could also be given to working with a marketing class or group at the University of New Mexico to undertake studies for the museum. These projects are under the direction of a professor and are usually class assignments

at a fourth year or graduate level. The reviewer has seen this effectively used at other academic museums.

It is recommended the education program develop an education proposal form similar to the one used for exhibitions. This will allow a careful review of proposed programs and ensure they meet the education policy and address available staff and financial resources.

It is recommended that standards be reviewed for text panels in exhibitions. The amount of text, the leveling of text ranging from introduction panels to tombstone labels, placement, point size, color, etc. should be considered in establishing these standards. Visitors are interested in learning about what is on exhibit and more than minimal information that is easily readable will be of interest.

One of the interests of the museum is to increase community support. It is recommended that museum staff continue to be involved in various community organizations representing the museum. This involvement in the community will be noticed and says to the community the museum supports Taos.

### **COLLECTION STEWARDSHIP**

What a great collection. It encompasses the many cultures of the Southwest with particular attention to New Mexico, although the works on paper collection extends beyond these geographical areas. There are truly some nationally important pieces at the museum.

The collection storage has gone from terrible to first class. With the expansion of the museum, a new state-of-the-art storage facility for the art collection and the archives was built. Congratulations. Adjacent to both spaces is a curatorial work area. New

storage systems were installed in the collection area and about eighty percent of the collection has been moved from the previous storage location. An inventory is being undertaken with the move and to date there have been no missing items. As part of this review, a spot inventory was taken to locate one work of art and related records. This was successful.

The new art storage screen system is a good system and one that maximizes the available square footage. Arranging the collection alphabetically on the screens makes it easy to find a piece. There are storage shelves for three dimensional works against the wall on the other side of the screen system from the storage entrance. A designated passage way should be maintained between two screens with no works of art hung on them for access to the three-dimensional storage shelves. Consideration should be given to using cradles for stability for some of the three dimensional works of art that will be placed on the shelves.

Work has begun on digitizing the collection, and it is anticipated this will continue to be a high priority. The museum is looking at both the state of New Mexico and the University of New Mexico as possible partners for the digitization project. More research needs to be undertaken in order to select which approach to take. A second project in the early planning stage is a conservation assessment of the collection. Both of these projects are important as the museum moves forward managing its collection to a high standard and meeting the needs for those interested in using the collection.

The collection management policy dates from 2005 and the archives management policy dates from 2010. In reviewing them, the archives management policy is reflective of current standards. The collection management policy is not up to

date and needs to have various policies added in order to meet today's standards. The check list of subjects found in the self-study should be used as the guideline for developing policies currently not in place. Not all subjects will have to be included in the museum's policy, but a careful review will determine which ones are necessary. Having a complete collections management policy is essential as the museum moves toward accreditation.

**Recommendations:**

It is recommended that a designated aisle with no art on the screens be created in the art screen storage system to give access to the three dimensional storage shelves. There is a concern with anyone walking to the three dimensional storage shelves may brush against a painting or other hanging work of art and damage it. Once the collection has been moved and the inventory is completed, only periodic annual inventories will be necessary until the next scheduled complete inventory in probably five years.

It is recommended that the museum continue to pursue the digitization of the collection. This project will require significant financial and staff resources but it will be important for so many people, ranging from school children to scholars. The collection is outstanding and should be available. This program should be carefully considered and included in the strategic plan at the appropriate time.

It is recommended the museum pursue grants to fund a conservation assessment. The Conservation Assessment Program (CAP) is a source and an application should be made when time and staff resources can be committed to the program. Visit [www.heritagepreservation.org](http://www.heritagepreservation.org) for more information.

The collection management policy does need work and it is recommended that this be undertaken over the next year. An up to date collection management policy is critical as the Harwood Museum of Art moves to accreditation. The MAP self-study lists the subjects that should be considered for a collection management plan and they should be reviewed to see which ones are applicable to the museum. The AAM web site has its Information Center listed on the home page ([www.aam-us.org](http://www.aam-us.org)) and under that there is a heading Collections Stewardship with great information and there are also Sample Documents that should be sources for information. Contact [infocenter@aam-us.org](mailto:infocenter@aam-us.org) for sample documents. Mention that you are a MAP museum. The Registrars Committee of the AAM is also a key source of information and samples and have an active listserve.

#### **ADMINISTRATION AND FINANCE**

The museum has ten full time staff and a number of part time and on-call staff. The Director of Development is on the staff of the University of New Mexico Foundation, although her office is in the museum and she fully operates as a museum staff member. The reviewer was impressed with every staff member. They are professional, passionate about their work, and dedicated to ensuring the highest standards are in place serving the museum's many audiences. If there is a concern by the reviewer, it is regarding the salaries of the staff. To be frank some salaries are extremely low. Identifying this issue is often easy; however, solving it is not as simple. There are probably budget limitations and human resources and salary policy issues of the parent organization at the University of New Mexico to deal with, but the fact remains some salaries are very, very low. It is strongly recommended that the Director and the

Governing Board continue to aggressively pursue the upgrading the salaries of the staff. If funding from the university is limited, which undoubtedly it is, perhaps creating an endowment that would supplement the salaries of staff could be established. This should be a high priority and an institutional plan should be developed to address the salary structure.

There is a need to review and adjust some position titles in order to more closely align them with titles commonly used in the museum field. To begin with it is understood there may be issues with the University of New Mexico's standard classifications for positions that are necessary to consider. The positions where there is some confusion and misunderstanding are Curatorial Manager; Curator I; Curatorial Assistant; Coordinator, Special Events; and Coordinator, Education Support. The Curatorial Manager title implies a registrar/collections manager position while in fact the position is a curator's position. The incumbent is responsible for the collection and for the exhibition program and a title reflective of these senior institutional responsibilities would be more fitting than the current title. The title Curator of Exhibitions and Collections has been discussed and is appropriate. The Curator I position title would be more appropriately titled Collections Manager, and the Curatorial Assistant's position title would be more appropriately titled Registrar. Both of these positions carry out the traditional duties and responsibilities of the suggested new position titles. Two titles in the education department should be revisited. The Coordinator, Special Events staff member has responsibilities related to educational programs as well as special events organized by both the museum and outside organizations. The title Coordinator, Public Programs would be more reflective of the responsibilities of this position. The

Coordinator, Education Support plans and carries out a wide variety of educational programs. The current title implies the incumbent only provides support to the education staff while in fact she is a key member of the education staff. A title change to Coordinator, Educational Programs would be appropriate.

In the self-study three new positions were identified: IT support, gallery guard, and Director of Marketing. Subsequent to the self-study being completed, IT support had been found in Taos through a contract basis. A gallery guard, patrolling the galleries, is absolutely necessary. The galleries have cameras that are monitored at the reception desk; however, now with the amount of gallery space on two floors there is a need for a gallery guard to regularly patrol. This will be a requirement as the museum moves forward to accreditation. The reviewer concurs with the need for marketing support. It was mentioned earlier about the status of Buzz, Inc., the current marketing firm that has relocated to Denver. It would be preferable to either secure a part-time or full time person or contract locally. While these three positions are identified in the self-study, in the strategic plan only adding curatorial staff is mentioned (7.5). It would be helpful to confirm what positions are priorities and adjust the strategic plan to reflect them.

One of the goals identified in the self-study is to increase the knowledge of museum standards and best practices by the staff and board members. This is an important goal and one that will be ongoing. A first step is to develop an institutional policy for professional development and training and include it in the strategic plan. The second step is to develop a plan that will include procedures and parameters. The planning process used in the development of the strategic plan where board members

and staff participated, would be a good model to follow here in order to ensure all voices are heard and to help shape the policy and plan. The plan should deal with museum wide issues such as ethics, finances, team work, board-staff relations, committee work, etc. where board members and staff participate together, and then also have specific plans to address needs of the Governing Board, Advisory Council, Alliance Board, and the needs, both collectively and individually of staff.

A development and training plan can take many shapes. A few thoughts:

- allocate an institutional budget that is managed with funds awarded by a staff committee to staff submitting proposals;
- set a budget for each staff member to use as they see fit for their development;
- establish a visiting program whereby staff from other institutions come and spend some time at the museum working with staff or alternately have staff spend some time working at another institution or another non-profit;
- establish a mentoring program using resources known by the museum or the online mentoring program available at AAM;
- encourage involvement in museum organizations not only as a member but as a contributor at conferences and a participant on committees and the board;
- have a monthly session at staff meetings that deals with a specific topic;
- regularly review various policies at board meetings such as the ethics document or another current topic and have a discussion as part of the

agenda; or bring in board members from other nonprofits and for profit organizations to talk about their experiences.

It is impossible to list all of the ideas and opportunities; however, looking at what is offered by national and regional organizations would be a good first step. Also the University of New Mexico may be a good source for some professional development programs. Providing professional development opportunities is a positive statement of support and appreciation to the staff. And by having the Governing Board involved in the process, there is a clear indication of an institutional commitment.

The Harwood Museum of Art has a membership group called the Alliance that was formed about fifteen years ago. Originally there was a Friends of the Harwood Museum of Art when there was a library in the building; however, when the library moved out they took the name with them, although it is believed not to be in use today. The Alliance is a separate 501(c)3 organization with its own board, and it sets an annual budget which now must be approved by the Governing Board. The Alliance Board then distributes quarterly funds to the museum. The museum staff performs the management and administrative duties related to the membership program. Over a short time, the membership numbers have increased to a current number of 737, largely attributed to the expanded museum. Also the number of volunteers has increased from eighteen to forty-two.

To be candid, the reviewer is concerned about the Alliance being a separate 501(c)3 organization. There is potential for misunderstanding, communication difficulties, and a lack of shared understandings of priorities and initiatives, which can lead to unwarranted tension between the museum and an independent but associated

organization. There is no doubt the Alliance is strongly committed to the Harwood Museum of Art and certainly wants what is best for it. It seems to the reviewer that dropping the 501(c)3 status and becoming an integral part of the museum under the governance of the Governing Board would be a positive step. This would ensure all parties have a shared vision for the museum and are working to meet the mission and implement the approved strategic plan. An institutional cohesiveness of purpose would result.

A University of New Mexico representative mentioned that the university is moving to eliminate all the stand-alone 501(c)3 organizations within the university system and have already reduced the number of organizations from twenty to ten. The reviewer confirmed this as the current policy of the university. With this policy in mind, it would be appropriate for the Alliance and the Governing Board of the Harwood Museum of Art to begin the process of changing the present Alliance 501(c)3 status to an organization with a new charter and bylaws fully integrated into the Harwood Museum of Art. The primary functions of promoting memberships and fundraising for the museum would continue with a Board overseeing the work; however, the governance would be under the Governing Board rather than as an independent 501(c)3 organization.

The University of New Mexico funds the majority of staff positions and provides some funds for operations of the museum. Others funds come from various endowments, currently totaling about \$2.3m, grants, and donations. The FY11 operating budget was \$970,650 and in comparing budget to actuals, the income was higher and the expenses lower. Each year there is a struggle for funding which the Director and Governing Board are well aware of. Two of the nine goals in the strategic

plan relate specifically to funding. Some objectives are based on generating income through the sales shop, programs fees, admissions, and fundraising events while others are endowment and donor cultivation based. The sales shop, while small, has an effective business plan and offers quality objects and materials. It turned a profit of \$12,000 in FY11.

The Development Director has prepared a Fundraising Priority Plan for 2010 – 2014 that outlines a goal of \$6,250,000 for endowments which would benefit various areas in the museum. This is an ambitious goal, particularly since the museum has just completed a capital campaign for the expansion. Obviously there is momentum and a real need for a campaign. The majority of staff and board members identified funding as the most serious constraint currently impacting the institution. There always needs to be a balance between fundraising for endowments and fundraising for annual operating programs. This deserves careful discussion with the Governing Board and Director to ensure all understand the priorities and emphasis on fundraising both short and long term.

Although the funds of the museum may be limited they are very well managed. The budget preparation involves those implementing the budget and has the appropriate overview and approvals. The monthly reporting forms are clear and well done. This area of the museum is very professionally managed. It should be mentioned that in the past the museum had generated a deficit of \$110,000 with the university but has taken on the responsibility to pay back at \$10,000 a year. The museum is to be applauded for doing this.

The museum building is an adobe style building spanning more than eighty-five years with the most recent addition being completed in 2010. The building is complex with some spaces meeting museum standards while others do not. Those meeting museum standards are the newer spaces and the spaces where exhibitions are held and collections stored. These spaces are very well done. The offices and education spaces, while very wonderful spaces, do not have air conditioning and humidity controls. To achieve museum environmental standards in these areas would be impossible or at such a high cost as to be prohibitive. The building is fully ADA accessible.

Parking at the museum is not satisfactory. There is a relatively small lot in front of the museum which is across the street and is often used by others in the area. Also the entrance to the museum is somewhat confusing. There are two sets of doors, one to the public galleries and one to offices. Some changes have been made to give prominence to the public entrance, and discussions are taking place to consider other changes. One thought would be to relocate the ramps that provide access to the office entrance. They are visually dominant and give the message that they are at the main entrance. Placing a ramp at the public entrance or alternately moving the first ramp from the plaza level further to the north may help emphasize the public entrance.

The emergency management plan is a work in progress. The plan in the MAP binder included only some of the necessary components for a viable plan. Staff pointed out they are working on revising and completing the plan. They have visited with the University of New Mexico-Taos to review their plan and are modifying sections from their plan to meet the needs of the museum. This is an excellent step. A high priority

should be placed on completing an emergency management plan. Using the list of procedures, emergency response information materials, and the forms and checklists in the MAP self-study would be a good start for a plan. Also keeping in contact with the University of New Mexico to ensure procedures for emergencies such as riots, earthquakes, and fires, follow university policies is essential. It would also be worthwhile to talk to local responders when developing the plan to receive their input and coordinate their needs.

**Recommendations:**

It is recommended to work on adjusting the salaries of some staff. This should be a high priority for the institution. It is also recommended that a plan should be put in place to deal with the salary adjustments in order for all to know how issues will be addressed. Should funding not be available from the University of New Mexico, there needs to be a discussion about the possibility of establishing a salary endowment to help deal with this matter.

It is recommended that proposed new positions be clarified and included in the strategic plan. Of particular importance is the hiring of gallery attendants to patrol the galleries during open hours. This is a necessary step as the museum moves toward accreditation.

It is recommended that a review of staff position titles, particularly those mentioned in this report, take place in order to adjust them to more closely reflect similar titles used at other museums. Since the staff deal with colleagues, proper titles are a reflection of institutional standards and professional standards.

It is recommended that an institutional policy for professional development and training for Governing Board, Advisory Council, Alliance Board, and staff be written and

approved by the Governing Board. A second step is to prepare a professional development and training plan addressing collective and individual issues, opportunities, and constraints for the Governing Board, Advisory Council, Alliance Board, and staff.

It is recommended, in keeping with the policy of the University of New Mexico, that the Alliance organization disband as a separate 501(c)3 organization. A new organization should be created with a new charter and bylaws, so as to continue the membership and fundraising programs with an oversight board. The new organization would be fully integrated into the operations of the museum and under the auspices of the Governing Board.

It is recommended that the Governing Board, Advisory Council, Director and Director of Development aggressively pursue the Fundraising Priority Plan for 2010 – 2014 with a goal of \$6,250,000. There is a strong need to stabilize the funding of the museum and thereby reduce the annual searching for funds just to carry out basic programs. This can only be achieved with endowments.

It is recommended that the emergency management plan become a priority with a goal of twelve months for completion. Not having a complete plan poses some threats to the museum as there are no procedures in place to address some situations. A fully approved emergency management plan is essential for accreditation. Accessing the Information Center on the American Association of Museums web site ([www.aam-us.org](http://www.aam-us.org)) and then clicking on the Facilities and Risk Management listing as well as the Sample Documents listing will provide a wide range of useful information. Request

sample documents by emailing [infocenter@aam-us.org](mailto:infocenter@aam-us.org). Mention that the museum is participating in MAP.

## **GOVERNANCE**

The Harwood Museum of Art has a unique governance for a university museum. In 2007, the Board of Regents of the University of New Mexico, by resolution, established the Governing Board of the Harwood Foundation of UNM. While a governing board was called for in the original gift of the museum from Lucy Case Harwood in 1935, it was not until seventy-two years later that a governing board was established. Prior to 2007 there was a large oversight board of the museum without governance responsibilities. The Governing Board has nine members, with three year terms renewable for a second term. Three members have to be University of New Mexico senior administrators while the remaining members are elected by the Governing Board members.

An Advisory Council was established at the time of the Governing Board in order to broaden the base of support for the museum. They are ambassadors for the museum. The Advisory Council members are appointed each year without term limitations. Members can attend the Governing Board meetings and are potential future Governing Board members.

Governing Board committees are executive, finance, building and grounds, collections, education, and development. Members of the Governing Board sit on the committees as do members of the Advisory Council and Alliance Board, with committee chairs coming from either the Governing Board or the Advisory Council. There is staff support for all committees. The Director, as an employee of the University of New

Mexico, reports to the Vice Provost for Academic Affairs although the Governing Board participates in the annual review of the director.

The Governing Board and Advisory Council have worked hard over the past several years raising funds for an expansion of the museum. The vision was clearly there and as the museum opened without any debt, the commitment was also there. It was clear in discussion with both the Governing Board and the Advisory Council, the passion for the Harwood Museum of Art is genuine, and there is a real interest in seeing the museum continue to grow professionally and be a central part of the community. While all of the board committees are important, the reviewer would like to emphasize the need for special people who are interested in fundraising to join the development committee. This committee must become extremely active if it is to meet the goals outlined in the development plan.

A second body of work for the Governing Board will be in transitioning the Alliance from a separate 501(c)3 organization to a new organization integrated within the operations of the museum, if the decision is made to do so. The Alliance is a long standing and committed organization to the museum and the Governing Board will have to work diligently and with sensitivity to manage any change. The reviewer believes that such a change will be of enormous benefit to the museum.

The Governing Board faces its first election of new members next year. In discussions with Governing Board members, it was clear that there is a concern about this transition. This coming year the Governing Board will have to address the roles and responsibilities of its members, terms of reference for committees, "job descriptions" for the Advisory Council and Director's Circle, criteria for nominations, types of experience

needed, diversity requirements, and means of implementing the elections. It is a critical time in the short life of the Governing Board, who must ensure transparent, effective, and best practices are in place for board governance and elections.

**Recommendations:**

It is recommended that all of the Governing Board committees be actively engaged in the museum, becoming “working” committees. Of particular importance is the Development Committee as the need to increase funding, both short term and long term is clearly evident. This will require a commitment of time and resources but the results will be enormous for the museum.

It is recommended that the Alliance transition from a stand-alone 501(c)3 organization to one under the governance of the Governing Board. The Governing Board will have to work diligently to ensure this transition will happen smoothly resulting in an organization that will benefit the museum and ensure that the current members of the Alliance have been fully part of the transition.

It is recommended that the Governing Board put a succession and election plan for membership on the board into place over the next six to nine months. The museum has made great strides with the current board members and it is incumbent on them to see that the next step is as strong and committed as has been the original Governing Board.

**CONCLUSION**

The Harwood Museum of Art is an outstanding institution, obviously at a turning point in its history. It has devoted volunteers who serve on the Governing Board, Advisory Council, Alliance Board, and in various areas of the museum, and there are dedicated and clearly committed staff. Significant changes have occurred over the past

four years including a new governing board, new Director, and a new facility. It was clear to the reviewer that the museum is committed to moving forward, implementing the highest standards in all areas of its operations. Internal procedures and systems are well in hand; the strategic plan is a strong document; the educational programs are creative serving people of all ages; the exhibitions exciting and diverse; and the collections significant and of high quality. The recommendations in this report are meant to assist the museum in taking the next step as it seeks accreditation by the American Association of Museums. There is no doubt in the reviewer's mind this will happen and the reviewer would like to extend best wishes to those at the Harwood Museum of Art for every success in their future work.

Museum Assessment Report  
Harwood Museum of Art  
University of New Mexico  
Taos, NM  
Visit August 24 – 25, 2011

## **RECOMMENDATIONS**

### **Mission and Planning**

It is recommended that the strategic plan be revisited to include a goal addressing how to strengthen the relationships, partnerships, and communication with the University of New Mexico. The museum is some distance from the main campus and this distance can be a barrier. It does seem to the reviewer that an institutional goal with short-term and long-term objectives would be helpful in integrating the museum into the culture and structure of the university.

### **Interpretation**

It is recommended that the museum continue to pursue securing the services of a company or individual to undertake audience research. The results of such work will help meet the needs of the museum, the interests of the community, and maximize the limited dollars available. Consideration could also be given to working with a marketing class or group at the University of New Mexico to undertake studies for the museum. These projects are under the direction of a professor and are usually class assignments at a fourth year or graduate level. The reviewer has seen this effectively used at other academic museums.

It is recommended the education program develop an education proposal form similar to the one used for exhibitions. This will allow a careful review of proposed

programs and ensure they meet the education policy and address available staff and financial resources.

It is recommended that standards be reviewed for text panels in exhibitions. The amount of text, the leveling of text ranging from introduction panels to tombstone labels, placement, point size, color, etc. should be considered in establishing these standards. Visitors are interested in learning about what is on exhibit and more than minimal information that is easily readable will be of interest.

One of the interests of the museum is to increase community support. It is recommended that museum staff continue to be involved in various community organizations representing the museum. This involvement in the community will be noticed and says to the community the museum supports Taos.

### **Collection Stewardship**

It is recommended that a designated aisle with no art on the screens be created in the art screen storage system to give access to the three dimensional storage shelves. There is a concern with anyone walking to the three dimensional storage shelves may brush against a painting or other hanging work of art and damage it. Once the collection has been moved and the inventory is completed, only periodic annual inventories will be necessary until the next scheduled complete inventory in probably five years.

It is recommended that the museum continue to pursue the digitization of the collection. This project will require significant financial and staff resources but it will be important for so many people, ranging from school children to scholars. The collection is outstanding and should be available. This program should be carefully considered and included in the strategic plan at the appropriate time.

It is recommended the museum pursue grants to fund a conservation assessment. The CAP program is a source and an application should be made when time and staff resources can be committed to the program. Learn more at [www.heritagepreservation.org](http://www.heritagepreservation.org).

The collection management policy does need work and it is recommended that this be undertaken over the next year. An up to date collection management policy is critical as the Harwood Museum of Art moves to accreditation. The MAP self-study lists the subjects that should be considered for a collection management plan and they should be reviewed to see which ones are applicable to the museum. The AAM web site ([www.aam-us.org](http://www.aam-us.org)) has Information Center listed on the home page and under that there is a heading Collections Stewardship with great information and there is also Sample Documents that should be sources for information. Contact [infocenter@aam-us.org](mailto:infocenter@aam-us.org) for the sample documents. Mention that you are participating in MAP. The Registrars Committee of the AAM is also a key source of information and samples and have an active listserve.

### **Administration and Finance**

It is recommended working to adjust the salaries of some staff should be a high priority for the institution. It is also recommended that a plan be put in place dealing with the salary adjustments in order for all to know how issues will be addressed. Should funding not be available from the University of New Mexico, discussion should see if a salary endowment can be established to help deal with this matter.

It is recommended that proposed new positions be clarified and included in the strategic plan. Of particular importance is the hiring of gallery attendants to patrol the

galleries during open hours. This is a necessary step as the museum moves toward accreditation.

It is recommended that a review of staff position titles, particularly those mentioned in this report, take place in order to adjust them to more closely reflect similar titles used at other museums. Since the staff deal with colleagues, proper titles are a reflection of institutional standards and professional standards.

It is recommended that an institutional policy for professional development and training for Governing Board, Advisory Council, Alliance Board, and staff be written and approved by the Governing Board. A second step is to prepare a professional development and training plan addressing collective and individual issues, opportunities, and constraints for the Governing Board, Advisory Council, Alliance Board, and staff.

It is recommended, in keeping with the policy of the University of New Mexico, that the Alliance organization disband as a separate 501(c)3 organization and create a new organization with a new charter and bylaws to continue the membership and fundraising programs with an oversight board. The new organization would be fully integrated into the operations of the museum and under the auspices of the Governing Board.

It is recommended that the Fundraising Priority Plan for 2010 – 2014 with a goal of \$6,250,000 be aggressively pursued by the Governing Board, Advisory Council, Director and Director of Development. There is a strong need to stabilize the funding of the museum and thereby reduce the annual searching for funds just to carry out basic programs. This can only be achieved with endowments.

It is recommended that the emergency management plan become a priority with a goal of twelve months for completion. Not having a complete plan does pose some threats to the museum as there are no procedures in place to address some situations. A fully approved emergency management plan is essential for accreditation. Accessing the Information Center on the American Association of Museums web site and then clicking on the Facilities and Risk Management listing as well as the Sample Documents listing will provide a wide range of useful information.

### **Governance**

It is recommended that all of the Governing Board committees be actively engaged in the museum, becoming “working” committees. Of particular importance is the Development Committee as the need to increase funding, both short term and long term is clearly evident. This will require a commitment of time and resources but the results will be enormous for the museum.

It is recommended that the Alliance transition from a stand-alone 501(c)3 organization to one under the governance of the Governing Board. The Governing Board will have to work diligently to ensure this transition will happen smoothly resulting in an organization that will benefit the museum and ensure that the current members of the Alliance have been fully part of the transition.

It is recommended that the Governing Board put into place over the next six to nine months, a succession and election plan for membership on the board. The museum has made great strides with the current board members and it is incumbent on them to see that the next step is as strong and committed as has been the original Governing Board.

## RECOMMENDED SOURCES

The following are some sources where information on various issues raised in this report can be researched. Rather than listing specific topics, it is recommended that staff and board members make use of the web sites listed here. They are a rich resource of information on virtually any issue related to the development of the museum

- American Association of Museums – [www.aam-us.org](http://www.aam-us.org); On the home page there are some listings that are applicable to the Harwood Museum of Art. The Information Center should be accessed and Collection Stewardship and Facilities and Risk Management listings are of importance to the development of the collections management plan and the emergency management plan respectively. Also Sample Documents is an important resource to see what other museums have prepared.
- Association of Art Museum Directors – [www.aamd.org](http://www.aamd.org); This organization is also a resource of information for museums and should be looked at the applicable material
- Association of Academic Museums and Galleries – [www.aamg.org](http://www.aamg.org); This is an organization related directly to academic museum and it is encouraged to make use of their resources.
- Museum Trustees Association – [www.museumusa.org](http://www.museumusa.org); This is an organization that the Governing Board should consider, particularly with the upcoming changes to the museum.

- Mountain-Plains Museums Association – [www.mpma.org](http://www.mpma.org); This is the regional museums association for New Mexico museum. This have become a viable and very useful organization for resources and conferences.

**Agenda  
MAP Visit  
Harwood Museum of Art  
August 24 – 25, 2012**

**Wednesday, August 24**

- 8:30 am Meet Susan Longhenry in Taos Inn Lobby
- 9:00 am Meet with Susan Longhenry, Director
- 10:00 am Site Tour
- 11:15 am Introductory meeting with staff and representatives of the Governing Board, Advisory Council, and Alliance Board
- 12:30 pm Lunch with Taos Community Leaders at Antonios restaurant:  
Cathy Connelly, Director of Tourism & Public Affairs, Town of Taos  
Morris Witten, Administrator, Museum Association of Taos  
Sarah Turner, Board Member, Taos Historic Museums
- 2:30 pm Meet with senior staff (assessment team)
- 3:00 pm Meet with Curatorial Manager Jina Brenneman and her team Debi Vincent, Betsy Bowen, and Richard Tobin
- 4:00 pm Meet with Curator of Education and Public Programs Lucy Perera and her team Jayne Schell and Asia Golden
- 7:30 pm Dinner at the home of Governing Board Chair Linda Warning and her husband Bobby

**Thursday, August 25**

- 9:00 am Meet with Unit Administrator 2 Lacy Cantu
- 10:00 am Meet members of the Alliance Board: Genevieve de Vellis (President), Judy Crouch (Vice-President), Peggy Hamilton (Events Chair), Sherri Wood, Charlene Tamayo, Ann Quinn, and Kathy Caunch
- 11:00 am Meet with Governing Board members: Linda Warning (Chair), Gus Foster (Vice-Chair), Marcia Winter (Secretary), Wynn Goering (Treasurer), Charlie Strong, and Michael Sudbury
- 12:30 pm Lunch with Director of Development Juniper Manley at Graham's Grill

- 2:00 pm Meet with Facilities Team: JR Martinez, Lead Facilities Technician and Nicholas Oppenheimer, Facilities Technician
- 3:00 pm Meet with Gift Shop Manager Carolyn Hinske (who also oversees admissions and visitor services)
- 4:00 pm Meet with Advisory Council Members: Rod Weston (TMS Superintendent), Andrew Ting, Jack Barrett, Cayley Bell, David Farmer, Frank Purcell, Janet Webb, and Wesley Rusnell
- 5:00 pm Meet with Director's Circle Co-Chairs David Farmer and Frank Purcell
- 6:00 pm Meet with Susan Longhenry, Director

## Characteristics of Excellence for U.S. Museums

### 1. PUBLIC TRUST & ACCOUNTABILITY

- 1.1 The museum is a good steward of its resources held in the public trust.
- 1.2 The museum identifies the communities it serves, and makes appropriate decisions in how it serves them.
- 1.3 Regardless of its self-identified communities, the museum strives to be a good neighbor in its geographic area.
- 1.4 The museum strives to be inclusive and offers opportunities for diverse participation.
- 1.5 The museum asserts its public service role and places education at the center of that role.
- 1.6 The museum demonstrates a commitment to providing the public with physical and intellectual access to the museum and its resources.
- 1.7 The museum is committed to public accountability and is transparent in its mission and its operations.
- 1.8 The museum complies with local, state, and federal laws, codes, and regulations applicable to its facilities, operations, and administration.

### 2. MISSION & PLANNING

- 2.1 The museum has a clear understanding of its mission and communicates why it exists and who benefits as a result of its efforts.
- 2.2 All aspects of the museum's operations are integrated and focused on meeting its mission.
- 2.3 The museum's governing authority and staff think and act strategically to acquire, develop, and allocate resources to advance the mission of the museum.
- 2.4 The museum engages in ongoing and reflective institutional planning that includes involvement of its audiences and community.
- 2.5 The museum establishes measures of success and uses them to evaluate and adjust its activities.

### 3. LEADERSHIP & ORGANIZATIONAL STRUCTURE

- 3.1 The governance, staff, and volunteer structures and processes effectively advance the museum's mission.
- 3.2 The governing authority, staff, and volunteers have a clear and shared understanding of their roles and responsibilities.
- 3.3 The governing authority, staff, and volunteers legally, ethically, and effectively carry out their responsibilities.
- 3.4 The composition, qualifications, and diversity of the museum's leadership, staff, and volunteers enable it to carry out the museum's mission and goals.
- 3.5 There is a clear and formal division of responsibilities between the governing authority and any group that supports the museum, whether separately incorporated or operating within the museum or its parent organization.

### 4. COLLECTIONS STEWARDSHIP

- 4.1 The museum owns, exhibits, or uses collections that are appropriate to its mission.
- 4.2 The museum legally, ethically, and effectively manages, documents, cares for, and uses the collections.
- 4.3 The museum's collections-related research is conducted according to appropriate scholarly standards.
- 4.4 The museum strategically plans for the use and development of its collections.
- 4.5 Guided by its mission, the museum provides public access to its collections while ensuring their preservation.

### 5. EDUCATION & INTERPRETATION

- 5.1 The museum clearly states its overall educational goals, philosophy, and messages, and demonstrates that its activities are in alignment with them.
- 5.2 The museum understands the characteristics and needs of its existing and potential audiences and uses this understanding to inform its interpretation.
- 5.3 The museum's interpretive content is based on appropriate research.
- 5.4 Museums conducting primary research do so according to scholarly standards.
- 5.5 The museum uses techniques, technologies, and methods appropriate to its educational goals, content, audiences, and resources.
- 5.6 The museum presents accurate and appropriate content for each of its audiences.
- 5.7 The museum demonstrates consistent high quality in its interpretive activities.
- 5.8 The museum assesses the effectiveness of its interpretive activities and uses those results to plan and improve its activities.

### 6. FINANCIAL STABILITY

- 6.1 The museum legally, ethically, and responsibly acquires, manages, and allocates its financial resources in a way that advances its mission.
- 6.2 The museum operates in a fiscally responsible manner that promotes its long-term sustainability.

### 7. FACILITIES & RISK MANAGEMENT

- 7.1 The museum allocates its space and uses its facilities to meet the needs of the collections, audience, and staff.
- 7.2 The museum has appropriate measures to ensure the safety and security of people, its collections and/or objects, and the facilities it owns or uses.
- 7.3 The museum has an effective program for the care and long-term maintenance of its facilities.
- 7.4 The museum is clean and well-maintained, and provides for the visitors' needs.
- 7.5 The museum takes appropriate measures to protect itself against potential risk and loss.

# American Association of Museums: Characteristics of Excellence for U.S. Museums *In Plain English*

## **PUBLIC TRUST & ACCOUNTABILITY**

Be good  
No really—not only be legal, but be ethical  
Show everyone how good and ethical you are  
(don't wait for them to ask)  
Do good for people  
Know which people  
And to be on the safe side  
Be nice to everyone else, too  
Especially if they live next door  
Avoid cloning  
Look something like the people you are doing good for  
And maybe a bit like your neighbors  
Let other people help decide what games to play  
And what the rules are  
Share your toys

## **MISSION AND PLANNING**

Know what you want to do  
And why it makes a difference to anyone  
Then put it in writing  
Stick to it  
Decide what you want to do next  
When you are deciding what to do, ask lots of people  
for their opinion  
Put it in writing  
Then do it  
If it didn't work, don't do it again  
If it did work, do

## **LEADERSHIP AND ORGANIZATIONAL STRUCTURE**

Make sure everyone is clear about who is doing what  
The board knows it is governing  
The director knows she is directing (and the board  
knows it too)  
The staff know they are doing everything else  
And have it in writing

## **COLLECTIONS STEWARDSHIP**

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

## **EDUCATION AND INTERPRETATION**

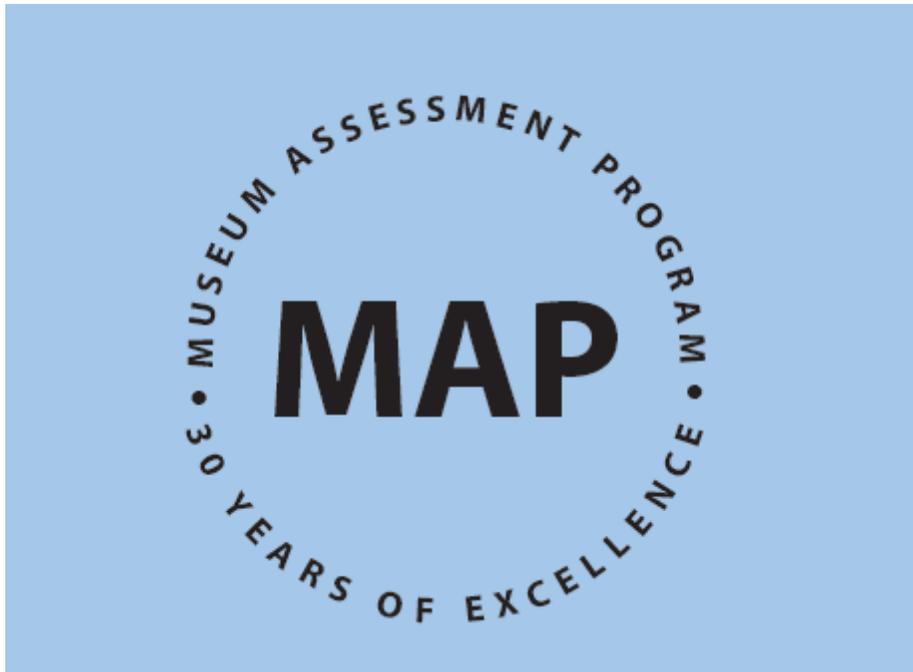
Know who you are talking to  
Ask them what they want to know  
Know what you want to say  
(and what you are talking about)  
Use appropriate language (or images, or music)  
Make sure people understood you  
And ask them if they liked it  
If not, change it

## **FINANCIAL STABILITY**

Put your money where your mission is  
Is it enough money?  
Will it be there next year, too?  
Know when you will need more \$  
Know where you are going to get it from  
Don't diddle the books

## **FACILITIES AND RISK MANAGEMENT**

Don't crowd people  
Or things  
Make it safe to visit your museum  
Or work there  
Keep it clean  
Keep the toilet paper stocked  
And if all else fails, know where the exit is  
(and make sure it is clearly marked)



## Museum Assessment Program State Resource Guide

# NEW MEXICO

The Museum Assessment Program is supported through a cooperative agreement between the American Association of Museums and the Institute of Museum and Library Services.

202-289-9118 • [map@aam-us.org](mailto:map@aam-us.org) • [www.aam-us.org/map](http://www.aam-us.org/map)

American Association of Museums  
202.289.1818  
[www.aam-us.org](http://www.aam-us.org)

Mountain-Plains Museum Association  
303.979.9358  
[info@mpma.net](mailto:info@mpma.net)  
[www.mpma.net](http://www.mpma.net)

National Trust for Historic Preservation  
Southwest Office  
817-332-4398  
[swro@nthp.org](mailto:swro@nthp.org)  
[www.preservationnation.org/southwest](http://www.preservationnation.org/southwest)

New Mexico Arts  
505-827-6490  
[www.nmarts.org](http://www.nmarts.org)

New Mexico Association of Museums  
[www.nmmuseums.org](http://www.nmmuseums.org)

New Mexico Commission of Public  
Records/State Records Center and  
Archives  
505.476.7911  
[www.nmcpr.state.nm.us](http://www.nmcpr.state.nm.us)

New Mexico Community Foundation  
505.820.6860  
[nmcf@nmcf.org](mailto:nmcf@nmcf.org)  
[www.nmcf.org](http://www.nmcf.org)

New Mexico Department of Cultural Affairs  
505.827.6364  
[www.newmexicoculture.org](http://www.newmexicoculture.org)

New Mexico Education Association  
505.982.1916  
[www.nea-nm.org](http://www.nea-nm.org)

New Mexico Grantmakers Directory  
[www.nmgrantmakers.org](http://www.nmgrantmakers.org)

New Mexico Historic Preservation Division  
505.827.6320  
[hpdplanning.program@state.nm.us](mailto:hpdplanning.program@state.nm.us)  
[www.nmhistoricpreservation.org](http://www.nmhistoricpreservation.org)

New Mexico Heritage Preservation Alliance  
505.989.7745  
[Info@NMHeritage.org](mailto:Info@NMHeritage.org)  
[www.nmheritage.org](http://www.nmheritage.org)

New Mexico Humanities Council  
505.277.3705  
[info@nmhum.org](mailto:info@nmhum.org)  
[www.nmhum.org](http://www.nmhum.org)

New Mexico Office of Archaeological  
Studies  
505.827.6343  
[www.nmarchaeology.org](http://www.nmarchaeology.org)

New Mexico Public Education Department  
505.827.5800  
[askCommunityRelations@state.nm.us](mailto:askCommunityRelations@state.nm.us)  
[www.ped.state.nm.us](http://www.ped.state.nm.us)

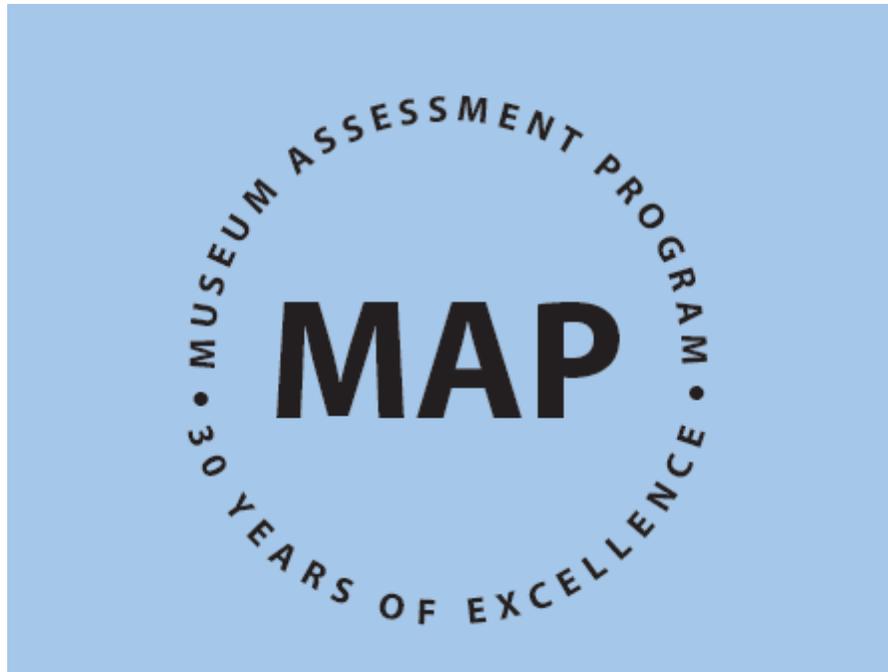
New Mexico Tourism Department  
505.827.7400  
[enchantment@newmexico.org](mailto:enchantment@newmexico.org)  
[www.newmexico.org](http://www.newmexico.org)

Old Loans State Legislation/Abandoned  
Property Laws

*Below is the state-specific law regarding  
the process a museum must undertake  
before an old loan (e.g. expired loan or loan  
of unlimited duration where the material(s)  
has been left unclaimed) can become its  
property. Consult with the state attorney  
general's office before taking any legal  
action.*

Citation: § 18-10-1 to 18-10-5  
Found in Collection Provision: No.

State Attorney General's Office  
800.678.1508  
[www.nmag.gov](http://www.nmag.gov)



# Museum Assessment Program

## Grant Writing Guide

### *Using Your MAP Report to Leverage Funding*

The Museum Assessment Program is supported through a cooperative agreement between the American Association of Museums and the Institute of Museum and Library Services.

202-289-9118 • [map@aam-us.org](mailto:map@aam-us.org) • [www.aam-us.org/map](http://www.aam-us.org/map)

This grant writing resource guide is designed to help your organization in preparing an effective proposal for a self-determined project in conjunction with your MAP self-study materials and assessment report. Attached to this grant-writing guide is a list of your state's government agencies and foundations, which you hope you will use in tandem with this guide. Please note that the following are general proposal recommendations and that you should always follow the specific guidelines a potential funder provides. The MAP staff wishes your institution success in any funding opportunity it pursues.

## Review the MAP Process

Before you plan and set priorities for your proposal, sit down with the assessment team and review the entire MAP process including your institution's progress towards implementation. Review your application, self-study workbook and MAP report. Are there any patterns that emerge? What are your implementation plans? How has your institution improved operations? This is an important first step in determining which projects are priorities, what resources you have to commit to future projects, and which priorities/projects need outside funding.

## Plan and set priorities

Determining which project is worth proposing can be achieved by looking over the MAP report and considering both the short and long term recommendations provided by the peer reviewer. In deciding which recommendation you will pursue for outside funding, ask yourself the following:

- What do you need?
- When do you need it?
- Why do you need it?
- Who do you need to do it?
- How much do you need to do it?

If you can answer those questions simply and succinctly, you should move forward and ask yourself the following questions that designed to dig a little deeper:

- How does this project align with your mission?
- Why is your organization the most qualified to develop and implement this project?
- How will you execute the project?
- What is the duration of the project?
- What will be included in the scope of the project?
- What staff will be needed to execute the project and their specific responsibilities?
- What outcomes do you hope to achieve? (Alternatively: How will you define the success of the project?)
- What resources do you already have available to use towards the project?

- Are there other individuals or organizations that you will need to partner with to complete the project? How will you identify these partners?

All of these questions will shape and guide your proposal. If you cannot answer these questions or if your project doesn't align with your mission, re-evaluate the project.

*Using the MAP Report:*

- Review the Mission and Planning section of your peer reviewer's report and evaluate your institution's mission statement. Examining your mission statement will guide your activities and decision-making process as well as clarify how your institution can further strengthen its mission and planning.
- Look over the recommendations, resources and appendices provided by your peer reviewer. Those supporting and sample documents will provide guidance on how to implement your projects.

## Compile a list of potential funding sources

- If your state has museum association, we encourage you to contact them and consult about likely funding sources;
- Seek advice from fellow museum professionals and your Board of Trustees to identify potential funding opportunities;
- Look at organizations with mission and projects similar to yours—review their funder list;
- Look for funding by foundations, state and federal agencies that aligns with your project by accessing their websites and exploring funding search databases;

## Prepare your proposal package

Your package should be well-organized, clear and concise. Make sure it follows the funder's guidelines for format, page length, project descriptions, and incorporates the funder's review criteria. Most proposal packages will include the following components:

1. Cover letter (one page): Make sure that before you submit the proposal, you are aware of the cover letter requirements and contact information for the funding organization. Include a thank you for the opportunity to submit the proposal.
2. Executive Summary (one page): This summary should include the following:
  - Project title and synopsis
  - Need
  - Expected outcomes
  - Timeline
  - Organization and its expertise
  - Funding requirements

*Using the MAP Report:*

Parts of your MAP report can help to shape your Executive Summary. The background information in the MAP report's summary will identify strengths and key recommendations. The brief institutional history with founding date, institutional mission, and overview of exhibitions/collections and program highlights, can be included in the proposal. The Executive Summary section of the report might highlight your institution's expertise and strengths. Review the following elements of your MAP report:

- Executive Summary
  - Introduction
  - Brief Institutional History
  - Summary
3. Statement of Need/Supporting Data (two pages): When arguing for your specific financial and capacity needs, it is helpful to use data pulled from surveys or evaluations your institution has compiled. Furthermore, review your Self Study Workbook Activities and Workbook and supporting document from the Peer Reviewer in order to compile supporting data. This data can include the following:
- Statistics culled by your staff, volunteers, governing authority, or internal data
  - Statistics gathered by external sources (e.g. city and state statistics, evaluations conducted by outside organizations, etc)
  - Examples, testimonials and anecdotes
  - Statements of Support from individuals and organizations (e.g. your peer reviewer, other cultural institutions, etc)

*Using the MAP Report:*

Draw specific content from the MAP report and the recommendations made by your peer reviewer. Remember that the peer reviewer is an expert professional and can be quoted in the proposal. You may want to include parts of the MAP report verbatim in your proposal. This section should support the case you are making.

4. Project Description (three pages): This section should give an overview of your goals and objectives for the project. When you select your project, consider and include in your proposal:
- Project narrative
  - Planned or desired outcomes
  - Action steps for achieving outcomes
  - Metrics of success to measure program results
  - Project staff (e.g., staff, governing authority, volunteers, consultants, collaborators). Specify what project staff is already available and who you will need to hire.

- Project resources. Include any resources that your institution already has available as well materials and supplies that will need to be acquired.
- Time line
- Sustaining the project. Explain how the project will continue to be funded in the future to insure funder that it is a good investment.

*Using the MAP Report:*

The peer reviewer's report should serve as a professional opinion regarding recommendations for improvement for your institution and may include specific suggestions towards the scope of your project. Your project team will need to consider the logistics of executing the project and how these steps will ultimately impact your institution. You may find it helpful to work with the reviewer to theorize action steps to implement your project.

5. Budget (one page): The budget should reflect and support the narrative and should be accurate and realistic. Make sure that someone familiar with your finances contributes to this section. In creating a budget, think about:
  - Expense information: personnel, non-personnel and overhead
  - Income information: grants, gifts, earned income, in-kind donations, etc.
  - Cost-share: Some grant and funding applications require a cost-share. Cost-share can be made up of a variety of sources including paid and unpaid staff time, in-kind donations, funding from another source, etc. By providing some form of cost-share, you are demonstrating to the funder your dedication to the project.
  - Although not required by all funders, compiling a budget narrative assists in planning for full, true costs and serves to validate expenses.
6. Organizational information (one page): This should be information about what your organization is, who it serves and why it serves them. Include the following:
  - Your mission (and vision statement, if applicable)
  - Brief overview of organizational structure: staff, volunteers and governing authority
  - Your community engagement: your audience, your programs and your expertise
  - Community relationships: either with other organizations, partnerships or councils.

*Using the MAP Report:*

Your MAP report will have this organizational information, usually at the beginning, in its Executive Summary. Use that as a model for writing the proposal summary. Also use the information you gathered for your self-study and additional documentation to fill out your organizational information. This will serve as a template for future funding proposals

7. Conclusion (less than one page): The conclusion should serve as your final appeal, which will restate the needs of your organization, why your organization is best suited to deliver the project, how this project will enhance the organization, and why this project will meet the criteria of the funding organization. Make a concise but meaningful final statement. Make sure that your organizational needs and the project's importance truly resonate.
8. Appendix: The appendix should support and complement your proposal, so choose materials and documents that make a strong and pertinent case. This may include MAP reports, data, and letters of support referenced in the Statement of Need/Supporting Data section.

*Using the MAP Report:*

Some of these documents may be found in your own MAP report's appendix. Review the materials that your peer reviewer has attached to your MAP report and see if they align with the project and the proposal.

## Proposal submission and results:

Before you send your proposal, double-check that you have the correct information regarding who and where to submit your proposal.

## Acceptance/Rejection

*If your proposal is accepted:*

- Send a thank you letter.
- Establish a cordial relationship—be professional and responsive. The funder is helping your institution grow and improve, and with the right attitude and performance, they could become an ongoing or future financial resource.
- Make sure to check grant agreements and grant report forms.
- Meet all deadlines for reporting.
- Communicate frequently/often—within reason.
- Work to meet the outcomes established in the report. If you discover that these outcomes cannot be achieved, reevaluate the project and discuss alternatives with your funder. Do not be discouraged.

*If your proposal is rejected:*

- Don't take it personally. This may not be the right time for your project with this funder. It is possible that a future opportunity will arise.
- If feedback on the strengths and weaknesses of the proposal is provided, review and use this information to strengthen and revise the proposal for future applications.

- If you have concerns about the rejection, it is appropriate to discuss the situation with the funder to see if they will explain the specific reasons you were not selected.
- Research other grant opportunities and deadlines and requirements for those.

## Proposal tips:

- Avoid jargon
- Humanize the project
- Keep it simple, concise—make sure to revise and edit!
- Connect the project to your mission
- Contact the funder discuss ideas and ask questions
- Tell a story
- Make it clear and honest
- Submit ahead of deadline

## Using your Peer Reviewer:

It may be helpful to ask your reviewer to review the proposal before you submit it. An external party that knows your operational capacity and your needs may give you further insight into your project's implementation and may give you resources to help support your case.