A Values Portfolio Workbook (VPW)

A road map to help you
EXPLOREx what you have,
DISCOVER who you are, and
LEARN what you can do with it.

FINAL REPORT

MAINE STATE MUSEUM AUGUSTA, MAINE
Preserving Maine’s Cultural Heritage: A Statewide Initiative

The stewardship of Maine’s rich cultural heritage is entrusted to many museums, libraries, archives, and historical agencies throughout the state. A great array of historical documents, artifacts, and objects define these collections, and although their holding institutions vary widely in resources and collections management expertise, they all share a common commitment to conserving and preserving our cultural heritage for future generations.

The 2005 Heritage Health index offered four recommendations for collection holding institutions: 1) they provide safe conditions for their collections; 2) they develop an emergency plan; 3) they assign responsibility for collections care, and; 4) they marshal public and private support for and raise public awareness about collections care.

The Maine State Museum (MSM) in partnership with the Maine State Archives (MSA), Maine Historical Society (MHS), Maine Humanities Council (MHC), Maine Archives and Museums (MAM), L.C. Bates Museum, Bangor Public Library, and University of Southern Maine (USM) proposes to create a statewide consortium to raise public awareness about collections care, and marshal public and private support for these collections.

The consortium will then work, over a 13-month project timeline, to create a dynamic system to help achieve the remaining three goals of the Heritage Health Index, starting with helping institutions provide safe conditions for their collections.

The four 2007 Connecting to Collections conference participants from Maine have spearheaded the statewide planning initiative, and all four individual institutions will act as representatives for the project to be known as Preserving Maine’s Cultural Heritage (PMCH).

The scope of this project encompass six major activities:

1) Creation of the working group dedicated to Preserving Maine’s Cultural Heritage (PMCH) which will help oversee this project.

2) Compilation, organization, and analysis of existing collections based information related to all collections held within the state and creation of associated databases (e.g. document, object, specimen etc.).

3) Assessment of the appropriateness of existing venues to help coordinate statewide stewardship efforts.

4) Creation of a values assessment ranking system, which will include a self study component, as well as a mechanism for comparison within and between institutional holdings for the purpose of ranking assistance efforts.

5) Dissemination of information related to these efforts, which will include training of value based assessment skills through regional workshops, public media such as local cable TV access, websites, and associated statewide newsletter articles.

6) Project portfolio and evaluation materials made available for broader dissemination. Please note the website access noted in item 5 will be designed to meet the needs of a broader national audience and will include the project portfolio and evaluation materials.
Maine’s Connecting to Collections Statewide Initiative

Protecting Maine’s Cultural Heritage

Cumulative information on the outputs and outcomes of the project
The Preserving Maine’s Cultural Heritage (PMCH) project set out to
maximize collaboration to allow for a new and systematic way to ad-
dress Maine collection care needs by addressing 6 goals. The goals
expected results and related products are addressed below.

1) Creation of a working group dedicated to Preserving Maine’s Cul-
tural Heritage (PMCH) which will help oversee this project.

This goal was fully achieved.

After the project restart in March of 2012, the PMCH working group
met 4 times over the 13 month extension. Project partners included
collection holding institutions self-identified as archives, libraries and
museums (see column on left). As anticipated the involvement of our
project partners helped to ensure a broad array of constituents who
were involved in the planning process and allowed easy access to
relevant communities.

The first meeting of the Project Partners for the Connecting to Col-
lections initiative was Friday August 31, 2012. During this meeting
the group analyzed a working draft of the Collections Value Assess-
ment tool. Group consensus crystalized around the need to move the
Values Assessment tool from a publication style format to a more user
friendly workbook publication that would be more inviting to both
professional and volunteer institutions. This decision cumulated in the
creation of the Values Portfolio Workbook which is included as a pro-
duct of this grant and listed under goal 6 deliverables.

2) Compilation, organization, and analysis of existing collections
based information related to all collections held within the state and
creation of associated databases (e.g. document, object, specimen
etc.).

This goal was fully achieved.

To fulfill goal 2 the Maine State Museum in consultation with the PMCH
partners hired a part-time project coordinator. Primary responsibili-
ties of the coordinator position included facilitating PMCH meetings,
coordination of outreach activities related to the dissemination of
learned results, as well as compiling all known available information
on the state of Maine’s collections garnered through historic surveys
or related activities. Discovery, compilation, analysis and database creation were all part of this process. A product database was created set up to allow any institution in Maine to search by their institutional title or location to determine if, as well as what kind of information was historically recorded for their institution. When information is shown to be available, the location of original source material is provided.

An abbreviated sampling of the kinds of information gathered for the database is listed below.

*1) 2008 Maine State Archives Access to Hidden Collections survey
*2) 2006 Maine State Museum, Museum for Americas survey grant of scientific collections throughout the state - [IMLS funded]
*3) 2006-2007 Maine State Museum Science collections Prospectus for Maine legislature
4) 2001 launch Maine Historical Society, Maine Memory Network - [New Century Community Program, IMLS funded] - 180 participating Cultural Organizations with outreach efforts
*5) 2002 Documenting our Heritage: Historical Records in Maine, A Report to the 120th Maine Legislature On the Condition of Historical Records in Maine. The Report (see HRREPT.DOC at ftp://ftp.state.me.us/pub/archives/), submitted on February 1, 2002 to the Maine State Legislature, provides the basis for future information for, and funding requests from, local and state funding resources.
*6) 1997 Maine State Archives Historical Records Repository Survey [sponsored by COSHRC]
7) 2010 Maine State Archives Survey of Civil War Materials
8) 1969 Archaeological Reconnaissance and Collections Survey Phase I: Inventory of Maine Indian Artifacts Held in Institutional and Private Collections
9) 1976 Maine State Museum Bicentennial Statewide Collection Survey

Please see the included summary finding aid and database for additional informational sources.

The database and finding aid are included as a products of this grant, and are listed under section 6 deliverables. A listing of all institutional names found in the database is scheduled to be published in the Maine Archives and Museums newsletter in 2013. In addition publication of this same institutional list will be repeated at an as yet unknown future date.

3) Assessment of the appropriateness of existing venues to help coordinate statewide stewardship efforts.

Although this goal was directly affected by the loss of a state-funded entity know as the Cultural Resource Information Center (CRIC); this goal was successfully completed.

Due to the unexpected 2009 loss in state bond money Maine’s Cultural Resource Information Center (CRIC) was discontinued. Initially goal 3 was intended to evaluate the effectiveness of this center related to cultural awareness, providing preservation tools, as well as providing access to outreach opportunities. Following CRIC’s closure, the most appropriate outreach venue appeared to be the Maine Archives and Museum’s membership organization known as MAM.

As a project partner, MAM played a key role in coordination of outreach efforts through their newsletter, website and workshop venues. General PMCH working group consensus was MAM was an active partner that helped to ensure effective information dissemination throughout the state and greatly assisted in coordinating statewide stewardship efforts; particularly related to
preserving Maine’s cultural heritage. When relevant, workshop surveys were conducted and used to help pinpoint needs and issues related to the values assessment initiative.

4) Creation of a values assessment ranking system, which will include a self-study component, as well as a mechanism for comparison within and between institutional holdings for the purpose of ranking assistance efforts.

Although this goal was directly affected by the loss of a state-funded entity known as the Cultural Resource Information Center (CRIC); resulting in only partial completion, the core of this goal was fulfilled beyond expectation.

The idea of creating a value assessment tool grew out of an attempt to capture an internal dialogue that was begun by Rob Waller (1995) related to determining risk assessment, and Judith Price and Gerald R. Fitzgerald (1996) who were the first to create a series of value categories related to collections, within the collections holding community. The necessity of creating a dialogue with the general public and other interested stakeholders is fundamental to being able to care long-term for our cultural heritage. By linking the idea of value categories to targeted user groups we hope to create a simple yet effective method for increasing dialogue and therefore obtain support from the public and other stakeholder communities.

The goal 4 effort culminated in the creation of the Values Portfolio Workbook (attached). This self-guided workbook is meant to act as a step by step guide to documenting the many values of an institution’s holdings and act as a springboard for soliciting the support so badly needed within the collections holding community.

Attempts to create a ranking system related to the values assessment tool were abandoned after the dissolution of CRIC, as CRIC was envisioned to be the home-base for this effort. Instead the PMCH working group focused on testing and refining the values assessment tool in active field settings. This resulted in the inclusion of four case studies in the back of the workbook meant to further illuminate the assessment process, its effectiveness and ability to generate concrete workable results.

5) Dissemination of information related to these efforts, which will include training of value based assessment skills through regional workshops, public media such as local cable TV access, websites, and associated statewide newsletter articles.

This goal was fully achieved.

Workshops and Presentations

Please note: All of the venues listed below, except for the 2009 workshop on Integrated Pest Management, dealt with the creation of the values assessment tool. Much of the work was presented in draft form prior to the restart of the Connecting to Collections Grant in 2012, at which time the final Values Portfolio Workbook began to take shape.

2013 Workshop, L.C. Bates Museum: Crucial Conversations: How To Assess The Many Values Of Your Collections To Maximize Support which included the roll-out of the Values Portfolio Workbook.
2012 American Association for State and Local History Conference, Salt Lake City, UT, October 4, 2012

2012 27th Annual SPNHC Creating Collections Relevance, New Haven, CT, June 11-16, 2012

2011 American Association for State and Local History; Connecting to Collections Conference in Richmond VA, as part of the “tools you can use” panel/presentation.

2010 New England Archivists meeting in Keene New Hampshire, panelist member for “Out of your comfort zone and in the collection”


2010 Maine Archives and Museum ”Ideas & Inspirations: Adapting to Change” Annual Conference in Saco, Maine.

2009 Workshop, L.C. Bates Museum: Working the Bugs Out: Effective and Safe Practices for Protecting your Collection from Pests. This initial workshop was created to serve two primary purposes; the first was to test the effectiveness of our state-wide outreach by tapping into our CTC partners. The second was to make collections care information more hands on and accessible to collections holding institutions across the state in order to begin to meet goals one and three of the 2005 Heritage Health index.

Outreach efforts also included a series of newsletter articles meant to inform our constituents about components of the grant and/or the values assessment process and prior to more public presentations, dry-run demonstrations were made to all partnering PMCH participants. In some instances this led to our PMCH partners then presenting these ideas back to their own boards and staff as they felt the ideas well worth pursuing. Lastly, when appropriate, attempts were made to capture workshop presentations through digital media such as digital snapshots, film and recordings.

Participatory Case Studies
As stated in our Workbook the following organizations volunteered to try the values assessment process within their institution. The quotes included in the Values Portfolio Workbook help express the effectiveness of this process as viewed by each institution’s own participant(s).

L.C. Bates Museum, Hinkley ME
“Our values assessment was completed as we were finalizing our new 5 year strategic plan. It has helped to inform the plan and helped us to identify and prioritize collections care and management activities, to define our diverse audience and to identify what audience driven educational programs are most supportive of our mission...It is helping the museum document and explain its value to potential funders.” —Deborah Staber, Director

Washburn Norlands Living History Center
“The values assessment is helping us build our case in seeking support for two ambitious restoration projects. It has helped us to think not only about our collections in new ways, but also the larger, in-tangible values of our museum campus and its rural setting. By starting a conversation on values, we were able to think about new user groups and how they might be attracted to our site. It was really helpful at the end of the process to have a working prioritized list of new ideas and potential partnerships.”—Sheri Leahan, Director

Readfield Historical Society & Museum, Readfield ME.
“Walking through the Values Assessment exercise has helped us make decisions on what collections are stored and what is available for the general public. We learned to look at a user not only
in terms of what we could do for them, but what they could do for us; leading to ways in which the visitor could become part of our outreach to the community. This project pointed out the importance of cooperation among organizations and the sharing of resources and ideas.”—Florence Drake, President, Readfield Historical Society.

**Vaughan Homestead, Hallowell ME.**

“When the group met, we felt that we weren’t yet clear enough about who we are to classify objects into irreplaceable, replaceable, etc. However, the values assessment process allowed us to come to this decision and gave us a jumping off point from which to discuss the role that our collections can play in our programming, etc. It was the perfect opportunity to bring together all interested parties for a formal conversation about our collections. Previous conversations took place informally and in smaller groups. The presence of a navigator—an “outsider”—helped us listen and think in more critical and constructive ways about what we needed to care for and preserve our collections. We will be meeting periodically over the next few months to continue the conversation.”—Tracy Weber, Program Director

6) Project portfolio and evaluation materials made available for broader dissemination.

This goal was successfully achieved, with the understanding that modification of the project was required due to the loss of the state-funded Cultural Resource Information Center.

**Project funds primarily paid for the services of a part-time project coordinator. The majority of whose time was focused on acquiring and reviewing past surveys related to Maine collections, creating and entering data into a Filemaker Pro database, generating a summary finding aid, assisting with writing and developing the Values Portfolio Workbook and coordinating the June 2013 workshop, that introduce the workbook to the participants.**

Tangible outputs for this project include the following:

- The Values Portfolio Workbook, prerelease version in PDF format.
- Draft Values Assessment manuscript intended for publication in peer-reviewed Journal.
- Connecting to Collections Maine survey data finding-aid, that records recovered information that has been entered into the Filemaker Pro database.
- PMCH Filemaker Pro stand-alone database and associated spreadsheet for alternate access to records; documenting historic collection care data for institutions in Maine

**Analysis of the overall achievements of the project**

Overall the Preserving Maine’s Cultural Heritage was successful in achieving its goals, and although Goal 4 was only partially completed the working group felt that the most critical component to garnering external support was the creation of the Values Portfolio Workbook, which was a tangible product beyond what was originally anticipated. Creation of the workbook was accomplished by redirecting efforts related to creating a ranking system to testing and revising the values assessment tool through active participation from interested institutions. These case studies became invaluable in understanding that the effectiveness of the assessment tool was not just in garnering external support but also as a tool to help determine institutional purpose and priorities.

**Value of grant products**

1) It is our hope that the Values Portfolio Workbook will become a worthwhile tool to the collections holding community, as well as to non-profits in general. Our intention is to try to continue to find ways to support the values assessment effort, in order to allow this project the time it needs to become part of the standard collections care toolkit designed to help solicit external support.
2) The associated database has statewide significance in that it records and documents baseline institutional information often lost as a result of staff turnover associated with limited funding or primarily volunteer run organizations. Attempts will be made to publish the names of organizations which have information contained in the database through the MAM newsletter or other print/web venues.

**Additional long term benefits for this project include**

a) The creation of a new PMCH consortium; allowing for a greater connectedness between partnering institutions and individuals, and increased access to relevant communities, available expertise and constituent resources;

b) An understanding of the effectiveness of MAM as an avenue to promote collections care, outreach and advocacy,

c) creation of a dissemination model for bringing critical collections care information to the state’s widespread, often rural audiences and

d) creation of a set of materials to use for future collaborations, training and outreach efforts within collections care communities.

**Unanticipated events or circumstances**

As the Cultural Resource Information Center was expected to act as model for cultural information dissemination, the closure of the CRIC office greatly affected our approach to this project. To a large extent this state supported entity had been a much coveted example of how to centralize information related to the care and upkeep of the State’s cultural heritage.

This loss of the CRIC center directly resulted in a restructuring of the overall grant, with the timeline compression the most significant change. As a direct result of this compression, our anticipated costs ended up being significantly less than originally budgeted (39,485 versus 25,362). The PMCH project did however maintain the 41% match level, although as expected overall match dollars were less.

**Lessons learned**

The ability to fulfill this grant was significantly affected by the 2009-2012 contraction of Maine State government, which ultimately resulted in the loss of institutional resources for the Maine State Museum, as well as the state bond-supported Cultural Resource Information Center. Alteration in the grant goals to refocus on the core ideas of the project (creation of the Values Assessment Workbook and creation of the historic collections information database) allowed for the grant’s successful conclusion, but delayed our ability to further target this project for statewide implementation.

This delay has resulted in a restructuring on how to move this project forward. The ability to reach relevant constituents is a fundamental underpinning of this project, which was made successful due to the outreach efforts of the MAM membership organization. For this reason MAM should remain a key partner in any follow-up planning. Although the Connecting to Collections line of funding has been discontinued, it is our hope that statewide implementation of the VPW will be continued either through alternate governmental or private funding opportunities. It is also recognized that now that the workbook is in hand, the lead organization for this effort could now shift to any one of our dedicated project partners.