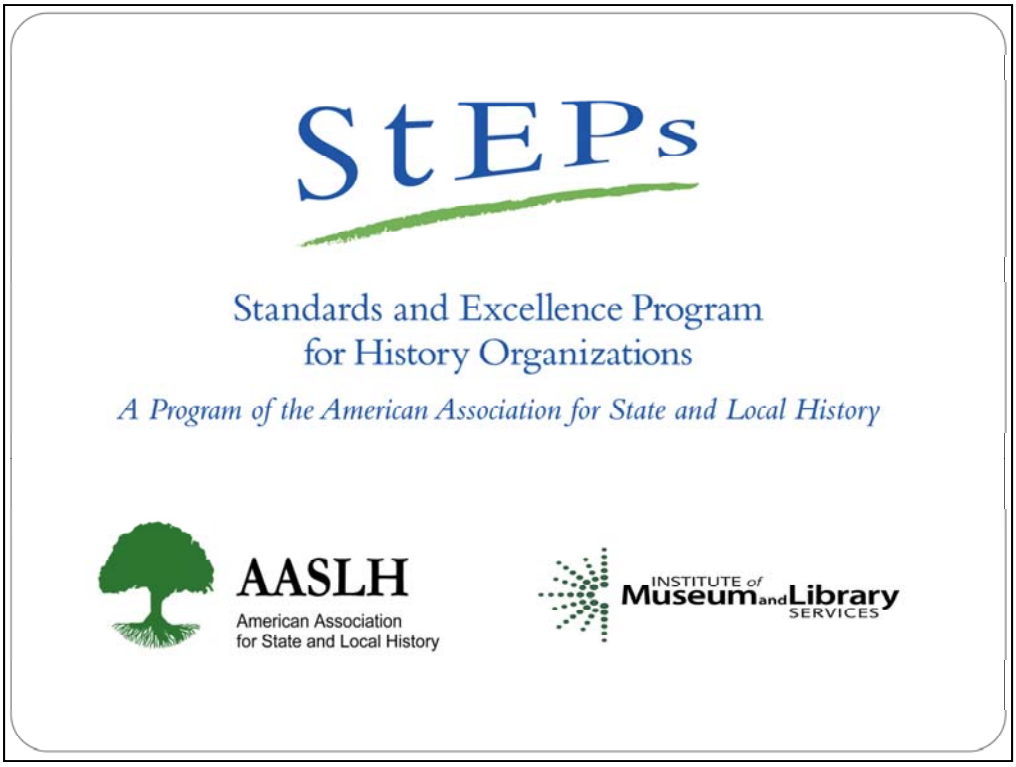
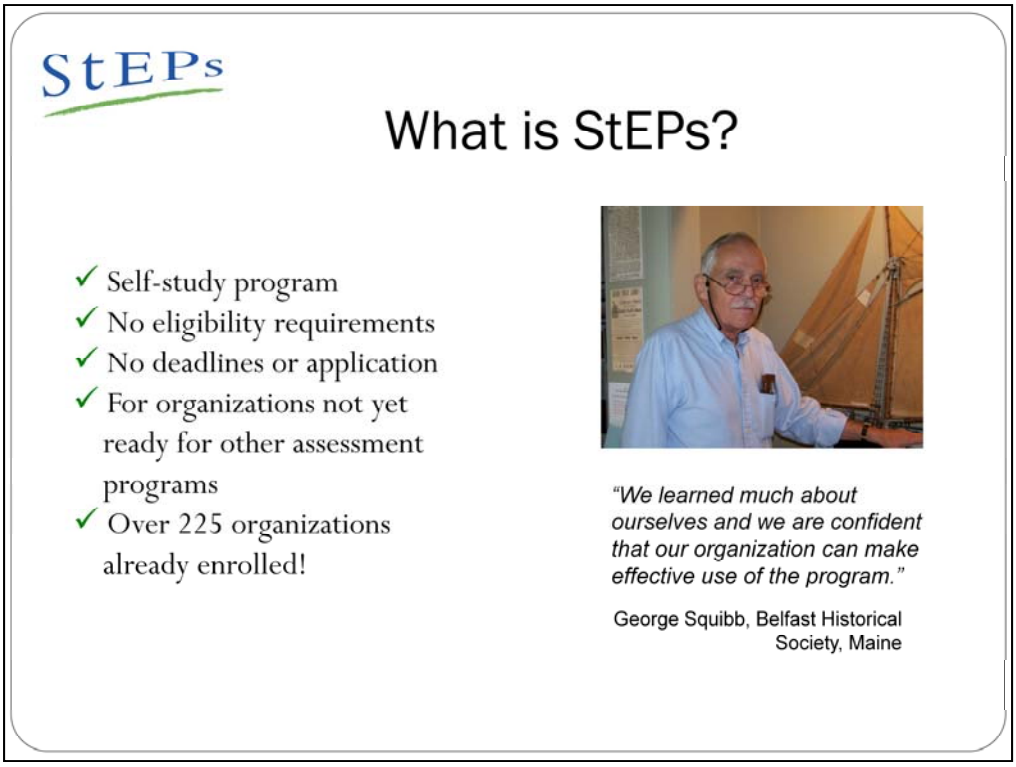
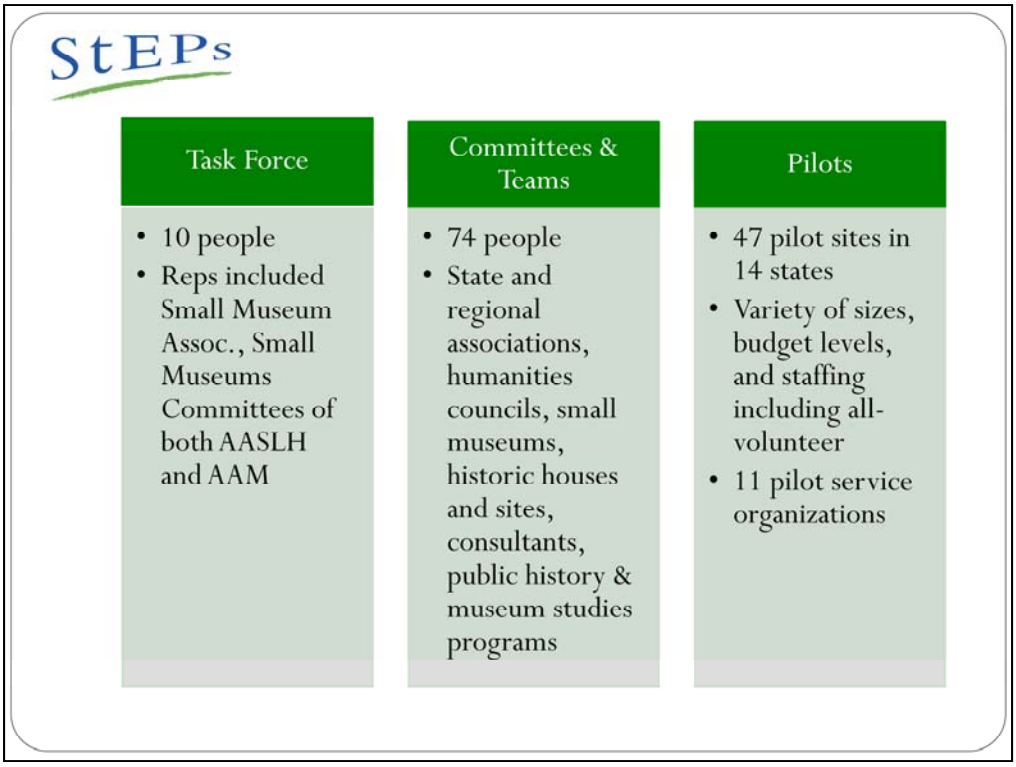


The Standards and Excellence Program for History Organizations – or StEPs – is a new program offered by the American Association for State and Local History. It was developed with funding from IMLS.

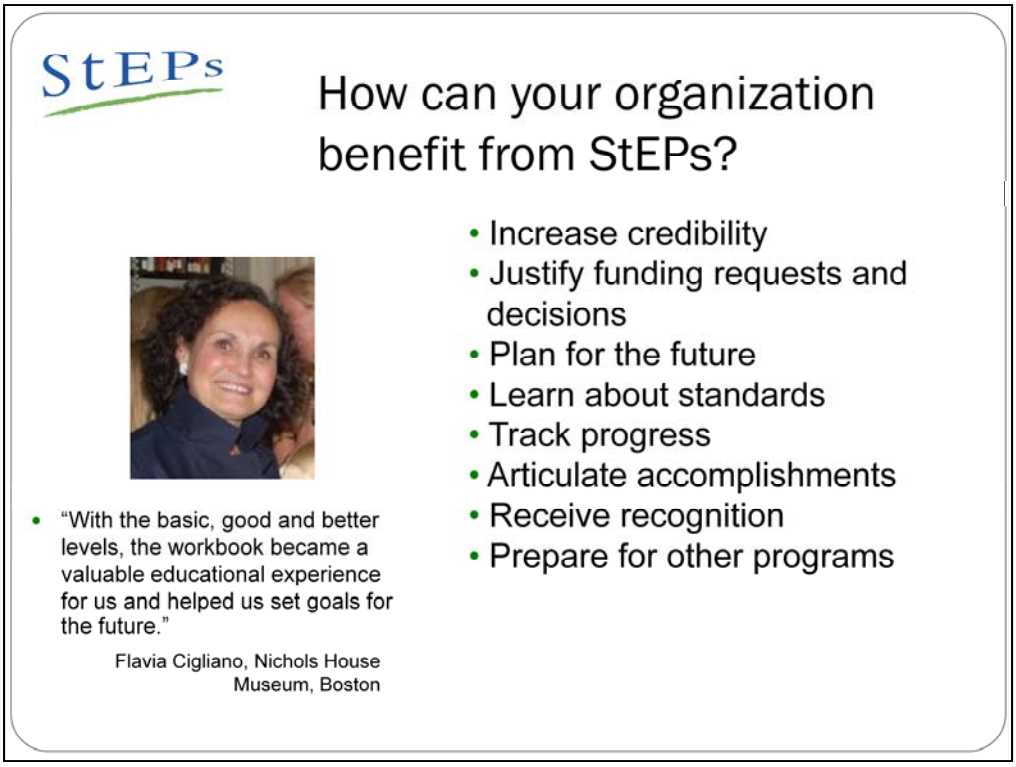


StEPs is a self-paced, self-study program with no application, no eligibility requirements, and no deadline for completion. It is intended for small- and mid-sized history museums, historic houses, sites, historical societies, and other organizations. Any organization, however, can enroll in the program. For larger museums, StEPs is an ideal tool for training entry level paid and unpaid staff.

StEPs is the perfect entry level program for organizations that do not feel ready for other assessment programs. With StEPs, history organizations now have specific recommendations for what they should be doing in order to meet national standards. These recommendations – called performance indicators – are the missing link that the field has been asking for. They answer the question, "*How do we know when an organization is meeting a standard?"* I'll show you an example of the performance indicators in a few minutes.

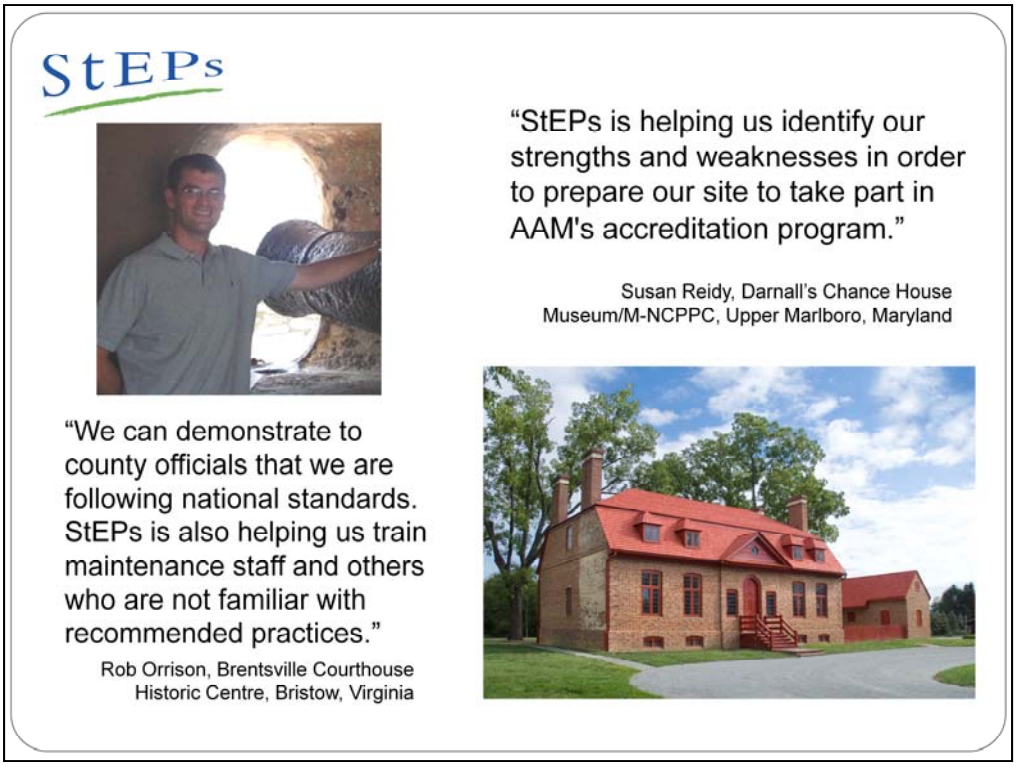


The development of StEPs was a grassroots effort – by the field, for the field. AASLH had help creating the program from more than 130 volunteers from 37 states. 47 history organizations piloted the program. The test sites were located in 14 states from Maine to Alaska, California to Maryland, and Mississippi to Minnesota. The pilots included all-volunteer historical societies, museums with some paid staff, historic houses, urban sites, rural sites, private nonprofits, government-affiliated museums, and tribal cultural centers. In other words, we tried to get a good mix of sites to test the program.

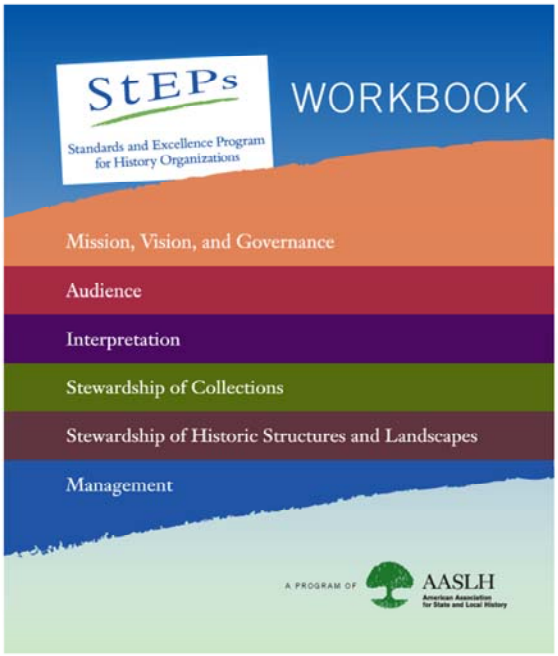


StEPs can benefit an organization in a variety of valuable ways.

1. By connecting your organization's plans and projects to the standards and letting your community know that, your organization gains credibility as one that is working to meet national standards. 2. Your organization can better justify funding requests it makes by connecting them to national standards. AASLH is already hearing from organizations that are having success with grant applications because they justified their request by connecting their proposed project to one or more standards. Important and sometimes difficult and unpopular decisions are better justified when they too are connected to national standards. 3. StEPs can help your organization identify goals which makes planning easier and more meaningful – and keeps everyone involved in the organization moving in the same direction towards a common set of goals. 4. More awareness of standards – what they are and how organizations can achieve them – is good for everyone involved in a history organization including volunteers, staff, and board members – also the community. 5. The StEPs workbook helps organizations track and document their progress. 6. When you are tracking and documenting your progress, you are better able to spread the word about your accomplishments and connect those accomplishments to national museum standards. 7. StEPs rewards your organization's progress with certificates each time it reports back to AASLH that it has achieved basic, good, or better performance indicators in a section of the program. This is a great way for your organization to highlight its accomplishments and be rewarded for its hard work. 8. And finally, if your organization chooses to move on to AAM's MAP program or other assessment programs, it will be well-prepared.

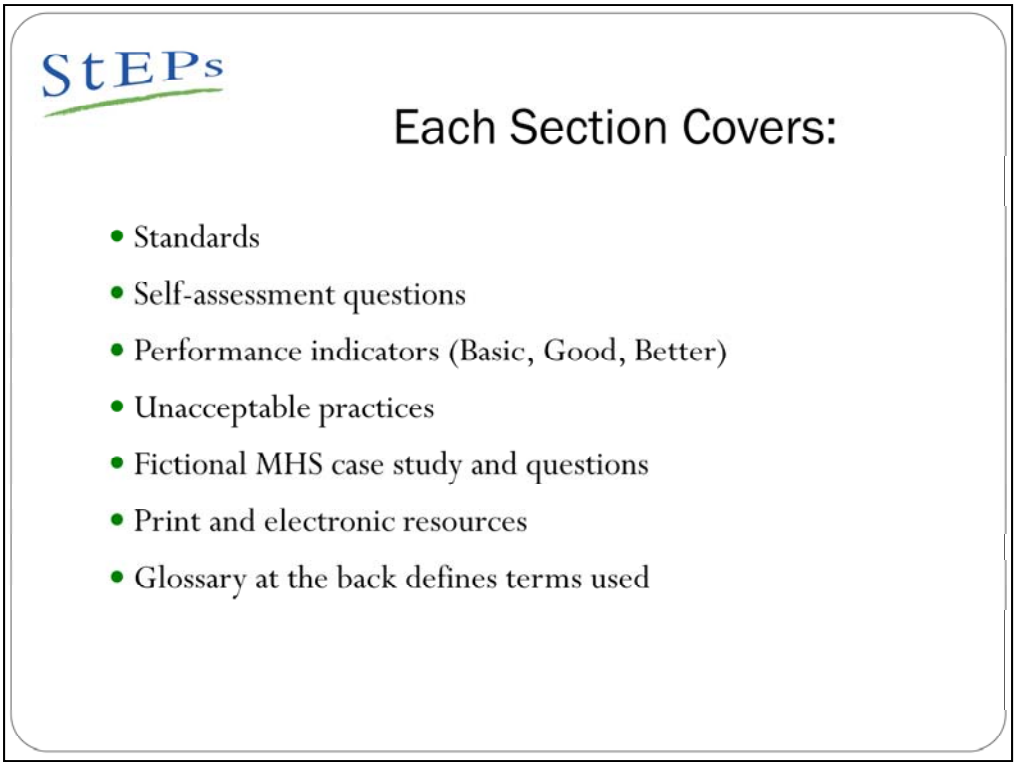


Moving on to other assessment programs is a choice. Not every StEPs museum may want to do that. AASLH did, however, work closely with AAM to make sure their programs and the standards they use are compatible. As I just mentioned, there are numerous ways that StEPs can benefit an organization and AASLH is hearing back from participants that they are definitely experiencing these benefits.

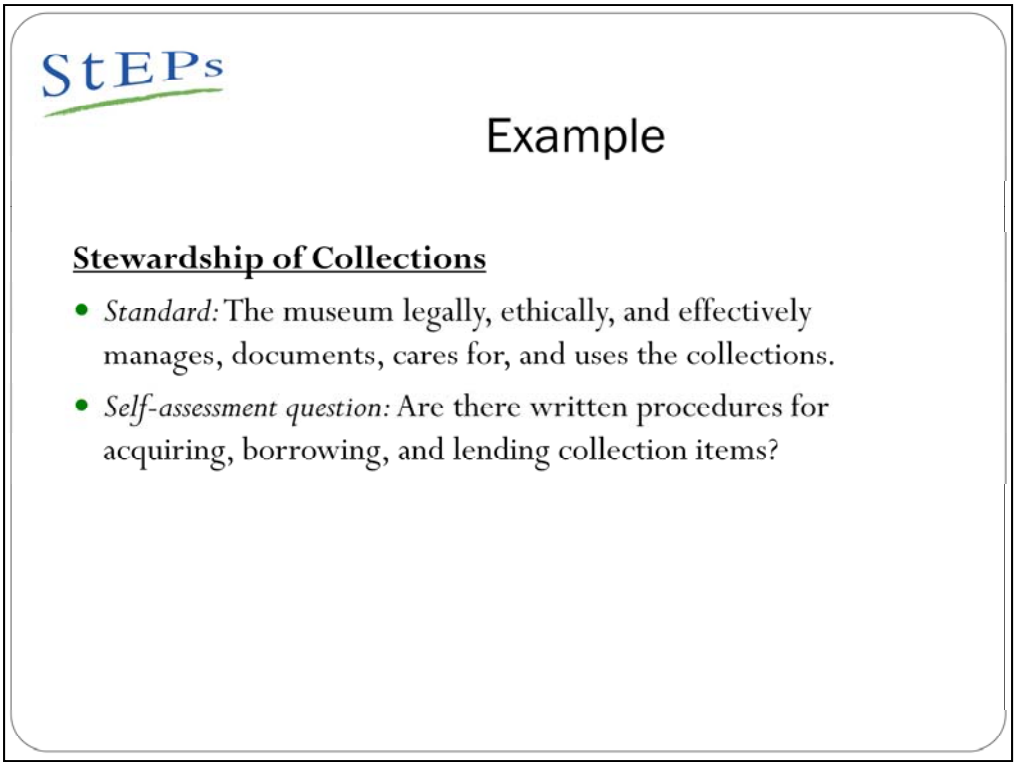


The StEPs workbook is at the core of the program. It is a 320-page spiral bound workbook that has plenty of space for you to write in as you answer the self-study questions and make notes. There are six standards sections that can be addressed in any order. There is no deadline for completing the program. You pay the enrollment fee only once, no matter if it takes your organization two years or ten years to complete the program. AASLH fully anticipates that most organizations will be in the program at least five years.

A nice benefit of the workbook is that it documents an organization's progress which is really valuable when there are transitions in paid and unpaid staff, board members, etc.



Again, the sections can be addressed in any order and at your own pace. The Middletown Historical Society case studies (which almost read like a soap opera – they so interesting) are great for group discussions. Sometimes it's easier to talk about another historical society's problems or issues and discuss how to solve them than it is to tackle those closer to home.



The next three slides show an example of a standard, a self-assessment question, and then its related performance indicators. In the workbook, an organization can check boxes next to the performance indicators it is currently meeting. Those boxes not checked are potential areas of improvement that the organization may choose to address and that can easily transferred to a long range plan.

Standards may have several self-assessment questions connected to them. This example asks whether the organization has written procedures for acquiring, borrowing, and lending collection items.

StEPs

Performance Indicators

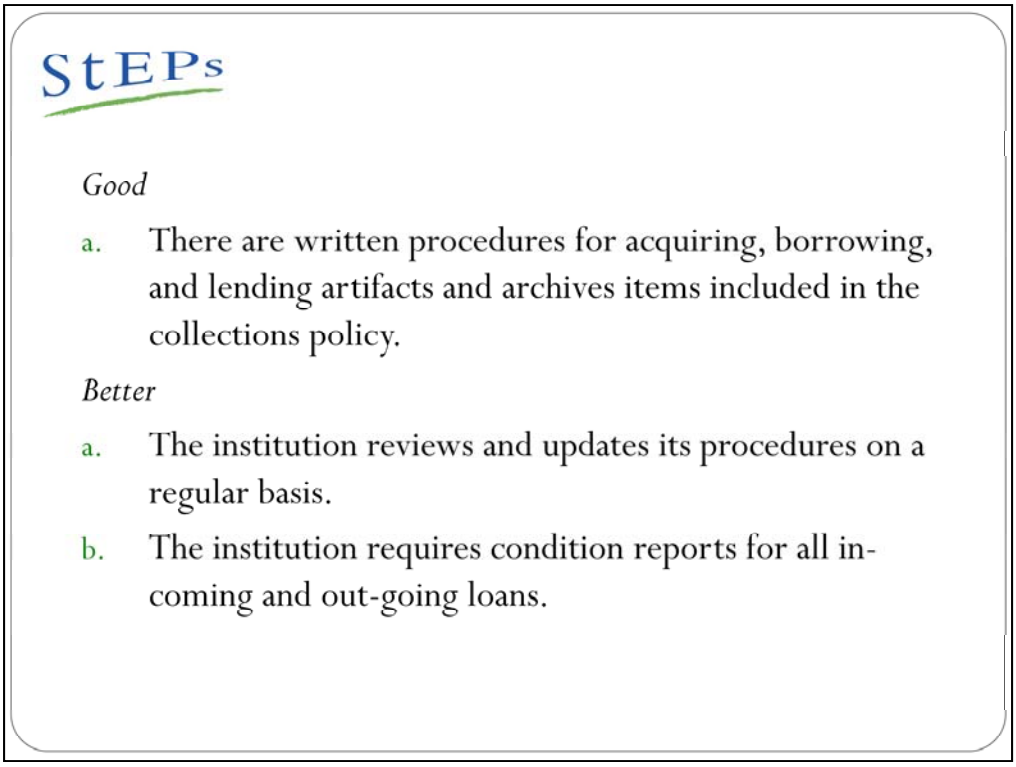
Basic

a. The institution uses a written donor form for artifacts and archives items accepted into its collections.

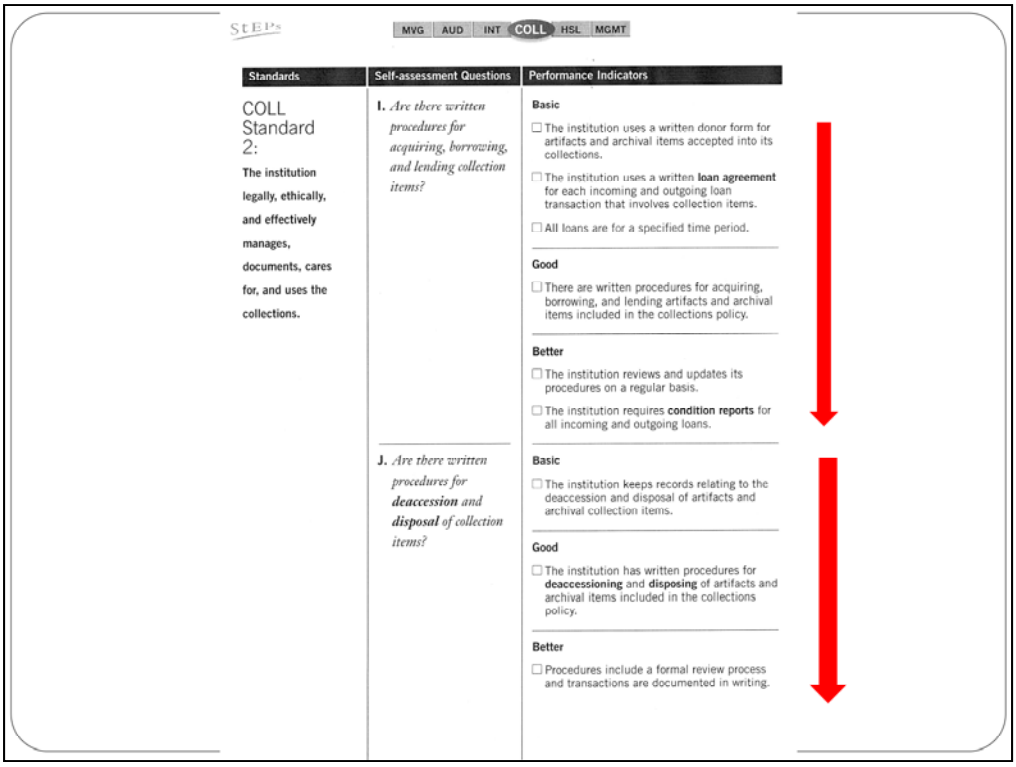
b. The institution uses a written loan agreement for each in-coming and out-going loan transaction that involves collection items.

c. All loans are for a specified time period.

Here we see the Basic performance indicators connected to that question.



Here are the Good and Better performance indicators. Performance indicators are cumulative: what you achieve at the Basic level is added to the Good level, and so forth.

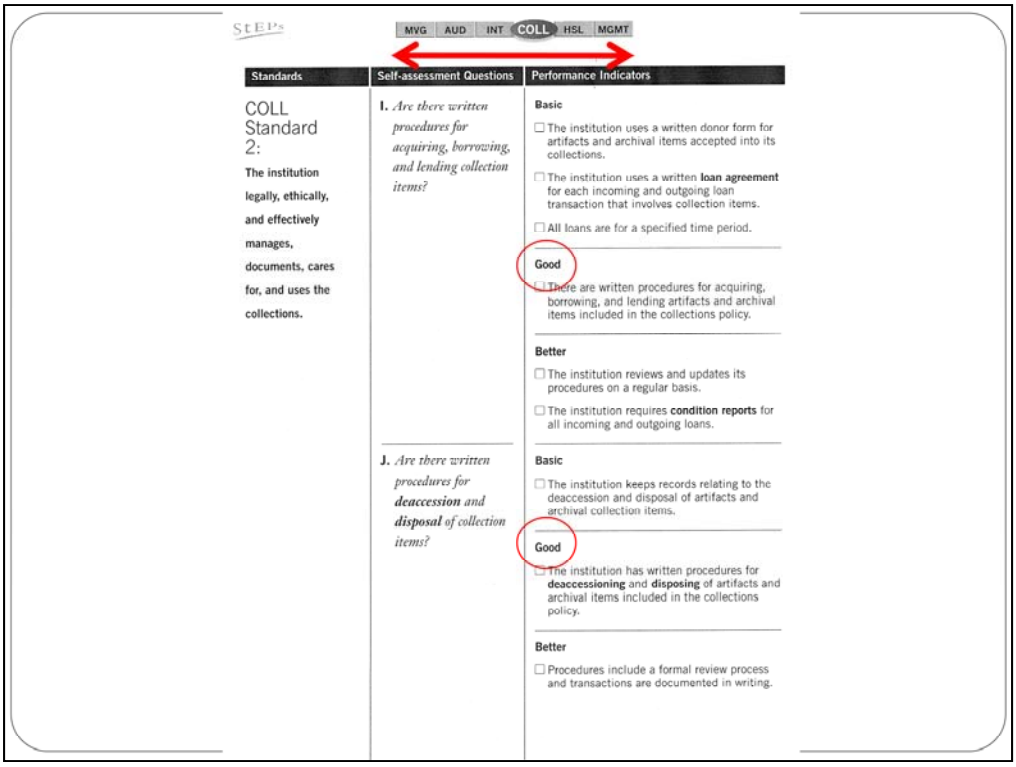


StEPs

MVG | AUD | INT | COLL | HSL | MGMT

Standards	Self-assessment Questions	Performance Indicators
COLL Standard 2: **The institution legally, ethically, and effectively manages, documents, cares for, and uses the collections.**	**I.** *Are there written procedures for acquiring, borrowing, and lending collection items?*	**Basic** ☐ The institution uses a written donor form for artifacts and archival items accepted into its collections. ☐ The institution uses a written **loan agreement** for each incoming and outgoing loan transaction that involves collection items. ☐ All loans are for a specified time period. **Good** ☐ There are written procedures for acquiring, borrowing, and lending artifacts and archival items included in the collections policy. **Better** ☐ The institution reviews and updates its procedures on a regular basis. ☐ The institution requires **condition reports** for all incoming and outgoing loans.
	J. *Are there written procedures for* ***deaccession*** *and* ***disposal*** *of collection items?*	**Basic** ☐ The institution keeps records relating to the deaccession and disposal of artifacts and archival collection items. **Good** ☐ The institution has written procedures for **deaccessioning** and **disposing** of artifacts and archival items included in the collections policy. **Better** ☐ Procedures include a formal review process and transactions are documented in writing.

There are 2 ways you can make your way through the workbook. The first is vertically – tackling one section at a time and working vertically down through each of that section's self-assessment questions and the Basic, Good and Better performance indicators connected to them.



StEPs

MVG | AUD | INT | COLL | HSL | MGMT

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A second option is to work horizontally through the workbook, looking first at the Basic performance indicators across all six sections; then the Good ones, and then finally the Better ones. Many organizations may find this option more beneficial than the other way because it helps them to address more quickly issues in need of immediate attention.

For example, if a museum without a collections management policy chooses to work vertically one section at a time, and it chooses to address the Stewardship of Collections section last, it could be several years before it discovers addresses this important issue. On the other hand, moving horizontally through the workbook, it will be made aware of that need early on. So the organization benefits by raising the bar to at least the Basic level in all six sections before tackling the Good and Better performance indicators.

An organization doesn't have to have a lot of money to get started making improvements and moving closer to achieving standards. Many suggested changes in the StEPs program involve communication and consensus building instead of money.

StEPs

$ (some money)

- Acid-free collections storage supplies
- Disaster preparedness kits
- Environmental monitoring equipment
- Traveling trunks for outreach to schools
- Exterior signage/signage along roads
- Collections care training for paid and unpaid staff

StEPs

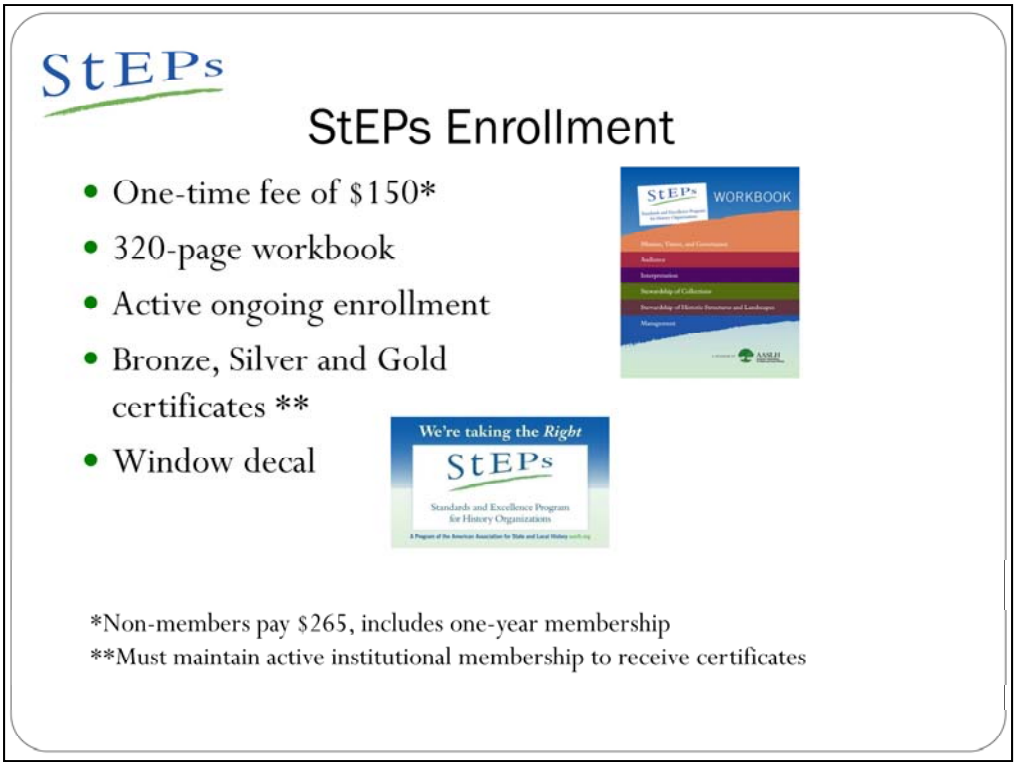
$$ (more money)

- Collections storage cabinets/shelving
- Interpretive plan consultant
- Annual financial audit by outside source
- Collections management software
- Historic structure maintenance/restoration
- More collections care training
- Appropriate off-site storage to relieve physical stress on historic structures

"We could demonstrate that our requests for additional funding in collections care were based on identified needs as defined by the standards, and not pet projects or a whim."

Katie Oliver, Kodiak Historical Society, Kodiak, Alaska

There are certainly some projects that if chosen by your organization to address may require fundraising or undertaking them in stages. Or, you might have to make the determination that they are not feasible at the current time.



StEPs is a program for organizational enrollment, not individual. AASLH member institutions pay a one-time fee of $150. As I mentioned earlier, it doesn't matter if your museum is in the program for two years, or ten years, you pay the fee only once. Non-member organizations pay $265, which includes a one-year membership in AASLH. For the fee, your organization receives: The workbook; A very nice window decal to put on your front door; The opportunity to earn a total of 18 progress certificates (6 program sections multiplied by 3 certificate levels – Bronze, Silver, and Gold = 18). Note that an organization must maintain an active institutional membership to be eligible for certificates

StEPs

Standards and Excellence Program for History Organizations

AASLH
American Association for State and Local History

CONGRATULATIONS TO

Washington County Historical Society

THIS **BRONZE** CERTIFICATE ACKNOWLEDGES COMPLETION
OF **BASIC** PERFORMANCE INDICATORS FOR

Stewardship of Historic Structures and Landscapes

StEPs is a self-study program for history organizations that encourages awareness and achievement of national standards.

Cherie Cook, Senior Program Manager

February 15, 2010
Date

Terry Davis, President & CEO

A PROGRAM OF THE AMERICAN ASSOCIATION FOR STATE AND LOCAL HISTORY

Certificates are earned on the honor system. You do not need to submit examples of your policies and other work. Once your organization is meeting all Basic indicators in the Management Section, for example, you complete the form at the end of the section and mail it to AASLH.

StEPs

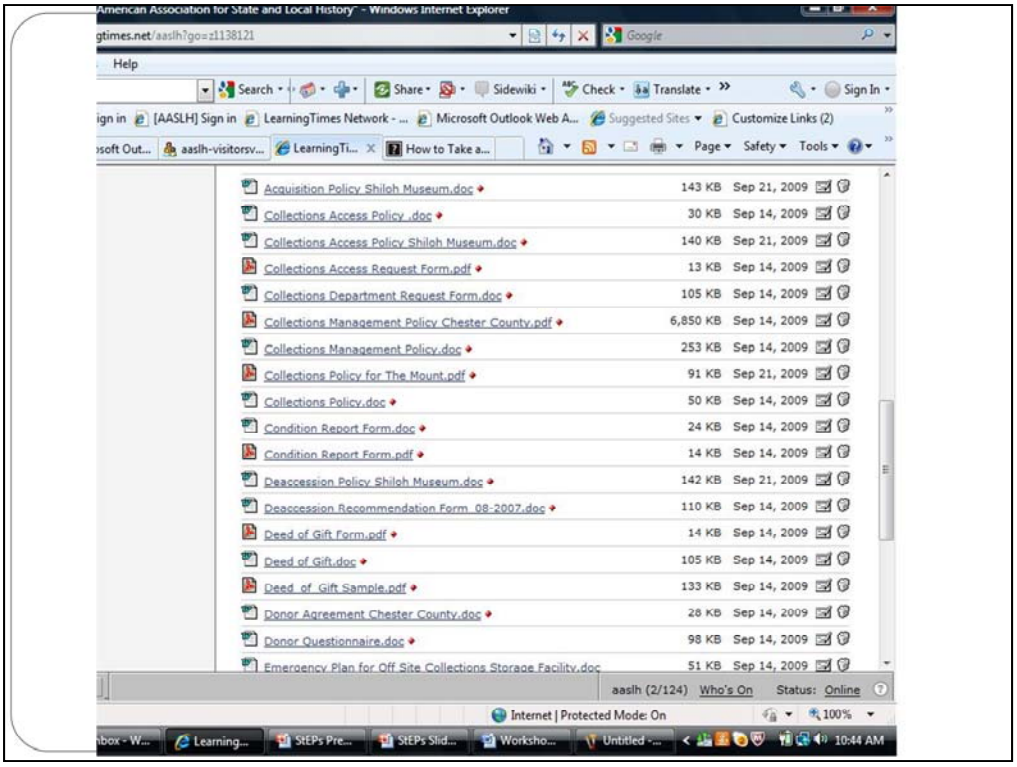
More Benefits

- National recognition for certificates earned
- StEPs website offering sample forms, policies, job descriptions and more
- 20% discount on AASLH technical leaflets
- 10% discount on AASLH workshops

"The StEPs program is probably the greatest thing to come along for small museums in the last decade or so. I've incorporated StEPs into all of the technical assistance programs I offer to small museums in Alaska."

Scott Carrlee, Alaska State Museum, Juneau, Alaska

StEPs participants also receive: National recognition on the AASLH website for certificates earned; 20% discount on AASLH technical leaflets; 10% discount on AASLH workshops; Access to the special StEPs website that offers a large variety of sample forms, policies, manuals, job descriptions and other resources.



Here's a sample of the types of forms, policies, and other documents that are on the site for you to use so you don't have to reinvent the wheel every time.

Organizations interested in enrolling in StEPs or learning more about the program can go online to the address shown on the screen. The web page offers several information sheets including one that can be given to board members, administrators, and others to help them understand why they should care about national standards and how participation in StEPs can be beneficial.

There's also an information sheet that can help an organization assess its readiness for participation in the program. Last year, AASLH offered a one-hour information webinar about StEPs; the link to that recording is on the site and you can watch it free of charge.

There are already over 225 museums and sites enrolled in the program.