



# FAAHPN

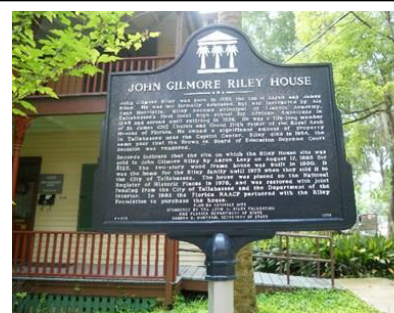
Florida African American Heritage Preservation Network

## PRESERVING THE LEGACY-

Planning, Mentoring, Coaching, Training for New Leadership



JOHN GILMORE RILEY  
CENTER/MUSEUM OF AFRICAN  
AMERICAN HISTORY AND CULTURE



## Althemese P. Barnes Executive Director Emeritus JOHN G. RILEY CENTER/MUSEUM

SEPTEMBER 9, 2021

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National Trust for  
Historic Preservation®



"....a desk top useable guide, reflecting back to when I began, how I progressed and learned much that I did not know but picked up in pieces from different conferences, meetings, conversations. [This] Attempt is to put some of that into a document that also provides a profile of two "successful" entities based on these steps."

Althemese Barnes  
Executive Director Emeritus



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## Introduction

Twenty-five years ago, in 1996, envisioned in Tallahassee, Florida was the need for a project that would uncover, rediscover, document and spread to various corners of the world the history of a people who survived, thrived and contributed far beyond expectation despite humanly imposed and inflicted barriers. Already existing was a cadre of independent African American museums in Florida that were founded and being operated mostly by retired individuals of the “Baby Boomer” generation. These Museum Founders, concerned that the history of African Americans, one of the most contributing populations to American society, was not being preserved and shared, had awakened to a spirit of activism. They had established museums in historic structures e.g. former African American owned schoolhouses, churches, businesses to serve as historical and cultural centers in their communities. Awakening to a denied, stolen or maligned part of American history, their right to define their own existence took wings and became museums devoted to expanding the reach of knowledge as it related to the value, benefit and positive impact of African American history. This knowledge and a desire to participate led to a vision to establish the first community-based African American museum in Tallahassee, Florida, the John Gilmore Riley Center/Museum (JGRCM). The vision took root and on January 2, 1996 the doors were opened.

When the doors to the John Gilmore Riley Center/Museum opened on January 2, 1996, little known or imagined was that it would become a catalyst for a movement that “brought African American museums in Florida out of the shadows” and into mainstream historical and cultural initiatives across Florida, and beyond. Giving deeper thought to what the museums had created and what more was needed, the focus turned to areas that included: collections care and management, technology, research methodology, resources and governance. There already existed a reservoir of knowledge, primary source information including oral histories on VHS and cassettes, historic documents mostly in manila folders and file cabinets and many executives and staff devoted to telling the stories of their communities. Within the collections and memories was an abundance of information about the history of Negroes/Blacks/African Americans who had achieved great things and contributed significantly to their communities despite many challenges.



Very little could be found in manuscripts, scholarly writings, history books and other mainstream publications documenting the history of these ordinary Americans who achieved extraordinary things. Yet for generations, these ancestors and pioneers that the museum leaders were documenting led the way for generations by feeding, clothing, housing, educating themselves and their off spring and knitting generations to the art and skill of survival in an oppressed society. The history present in museums showed that the pioneers did not rely on the dominant race to get the job done. Rather, in many cases, because of discriminatory laws, they helped also to care for and cultivate the folk who made their lives most difficult and challenging – white America. Regrettably, it was "culturally acceptable" that among those who had power and money and/or were of the white race– derived a benefit to a great degree from the labor, contributions and inventions of Black America. This backdrop, and gaps that existed in the annals of American history, gave rise to the establishment of African American museums in Florida, including the John Gilmore Riley Center/Museum.

In 1997, another spark ignited and from it a decision to “no longer operate in the shadows” or accept neglect of this history. With spirits of activism, the Florida African American museums led the way to establish a consortium of African American museums known as the Florida African American Heritage Preservation Network (FAAHPN). The mission and purpose was to collaborate and escalate the telling of their stories and preserving of their places. From that point, the arc began to bend toward greater recognition and inclusion in mainstream historical and cultural initiatives – because - these museums decided it was time and that they had the ingredients, more than anyone else, to make it happen.

According to a publication by Martha L. Semmel, *“Partnership Power, Essential Museum Strategies for Today’s Networked World,”*, in Chapter 21, she says that *“in some ways the Florida Network was ahead of its time, in its recognizing the power of a network to benefit all of its members and in taking on the ambitious work of organizing diverse entities with common interest to gain visibility, recognition, and, to practice the maxim that a rising tide lifts all boats.”*



Inspired and stimulated by desire, the museums went about putting a greater focus and color into the writing and preserving of the history of Florida. That journey and evolution is shared in this Guide as a model of how individuals, communities, businesses, educators and families can redirect in ways that uplift and enhance, educate and engage and through collective resources and strategies advance and sustain.

The John Gilmore Riley Center/Museum (JGRCM) and the Florida African American Heritage Preservation Network (FAAHPN) Founder, Althemese Barnes, herself a “Baby Boomer”, are capitalizing on twenty-four years of experience to share this unique journey from the shadows to more visible, contributing and respected positions in the world of museums. Again, foremost to success was the efforts of the “Baby Boomers”, many of whom are now looking to “sunset”. As they prepare to reposition, a greater and more important 21<sup>st</sup> century role will be to knit a new generation of museum leaders through planning, mentoring, coaching and training. This collective narrative of two organizations, JGRCM and FAAHNP, integrally connected and successful, provided the incentive for this informational and educational Guide.



## CHAPTER I

### Historical Background - The Beginning

Existence of the John G. Riley House, home of the John Gilmore Riley Center/Museum and headquarters of the Florida African American Heritage Preservation Network (FAAHPN), as a place to educate and inspire today almost did not happen. In the 1970's the city of Tallahassee acquired the house for back taxes with plans to demolish and build an electric substation on the site. A group of individuals who knew the original owner, John Gilmore Riley, and had benefited from his wise counsel and pioneering leadership as the first African American principal from 1893 to 1926 of Lincoln Academy (later Lincoln High School) in Tallahassee, Florida determined that would be a travesty to his legacy.

Mr. Riley was born into slavery in Tallahassee and Leon County, the capital of Florida, on September 24, 1857. When freed in Florida by the Emancipation on May 20, 1865, he studied and pursued education for a career. In 1891, John Riley obtained his first teaching job in Wakulla County followed by a one-year appointment to a teaching position in Gadsden County. In 1893, John Riley applied for and was appointed principal of Lincoln Academy, one of three freedmen schools built in Florida to educate newly freed slaves and their descendants. In addition to pioneering in education, Mr. Riley amassed over 50 parcels of real estate, was Grand High Priest of the Royal Arch Masons of Florida and traveled the Southeast region of the United States organizing Christian Methodist Episcopal (CME) Churches during his 97-year life span. His house, constructed in 1890 for his family, still stands at its original location, has been restored and was opened in 1996 as the first African American community-based museum in Tallahassee and Leon County. It was listed in the National Register of Historic Places in 1978, the second African American home in Florida to be so designated, the first being the home of Dr. Mary McLeod Bethune, Founder of Bethune Cookman College (University) in Daytona Beach, Florida. Mr. Riley died in May 1954 at age 97.

In an autobiography pinned by him at age 90, John Riley stated that *“the three things that could place the Black man more on the level with the White man were: obtaining an education, acquiring/owning property and caring for the poor.”*





In 1973, a group of individuals organized the John Gilmore Riley Foundation to raise funds to acquire the house back from the city and establish it as a place to research, document and promote the history of African Americans in Leon County. The goal of acquiring the house from the city was accomplished in 1981. By this time, in need of repairs, the foundation held fundraisers and secured grants from the Florida Department of State and city municipal funds to restore the house. Unable to establish the museum at that time, they allowed it to be used for an office by a couple of organizations, including the local branch of the National Association for the Advancement of Colored People. Upon retirement from state government in 1995 after a thirty year tenure, and having joined the Foundation and serving as its Secretary, Althemese Barnes fulfilled the original intent of the foundation and took the necessary steps to establish the John Gilmore Riley Center Museum.

### **John Gilmore Riley Foundation Inc. Board of Directors**

**Chartered in 1979**

James Sanders, Chairman

James M. Proctor, Vice Chairman

Charles Worsham, Secretary/Treasurer

C. Dubose Ausley	William Proctor, Sr.	Edwin Norwood, Jr.	Luther Smith
Robert Travis, Jr.	Edwin Norwood, Sr.	Pearline Ranson	Nathaniel Dowdell
Polly Carnegie	Rev. A.J. Richardson	Dr. Freddie J. Martin	Dr. Earl Britt

Historian: Dr. Arthur E. Teele Sr.

National Register Consultant: Nancy Dobson, Tallahassee Trust

City Administrative Support Staff: George Manning and Darryl Gorham





## CHAPTER II

### The Challenge

The John Gilmore Riley Center/Museum was established with a zero budget and a Founder who had never written a grant or engaged in fundraising. There was no Board of Directors and Articles and Bylaws, tax-exempt status and the Florida Department of State Corporation papers of the John Gilmore Riley Foundation Inc. were outdated. The years from 1996 to 2000 were filled with attention to legal and governance issues and holding meetings with local, state and national decision makers in the areas of historic preservation and resource development to acquire knowledge of the industry. Another primary focus was to establish partnerships with individuals and organizations that had the professional knowledge and decision-making power to move the museum from basement to emerging into a highly respected and thriving institution.

Though segregation laws and practices no longer existed “supposedly”, many vestiges remained. Looking back, the negative was perhaps the greatest positive. The Founder, going about sharing the John Gilmore Riley history, and that of the once legally segregated Black community in which the house was located, Smokey Hollow, gained friends, volunteers; board members of various races, cultures, influence, capabilities who were interested and willing to journey on this new path to African American historical and cultural preservation. The history of Smokey Hollow added to the intrigue. Smokey Hollow was an African American community that evolved after slavery in what is now downtown Tallahassee. The community had over eighty families with their schools; churches, businesses and some single family homeowners though most were renters. Located in the face of the Capitol building, it was labeled by some to be an “eyesore”. Subsequently, in the 1960s the community was demolished by eminent domain. The Riley House is the only house of that now historic district that remains and is open to the public. A complete history, as told by the former residents for a JGRCM oral history research project, was published in 2018 and can be found in the Library of Congress. The John Gilmore Riley Center/Museum established a reputation and today, twenty-five years later, is heralded for its myriad of historical programs, model and catalytic projects and broad outreach locally, across the state and nationally.



## CHAPTER III

### Networking - Casting the Net

Discovering that funds were available through local, state and national institutions but heretofore unknown to the Founder and the soon organized Board of Directors, a primary focus was to research, write and pursue grants that were accrued largely as a result of local, state and federal taxes. The early years brought formidable challenges, often finding the John Gilmore Riley Center/Museum the only African American applicant in the grant pool, and facing all white grant review panels. Equally frustrating and complicated was the fact that much larger more experienced and longer operating white owned and operated museums were better positioned for the competitive grant process. Many were able to hire professional grant writers. In addition, though no longer legal, discrimination, overtly or covertly, was still systemic and practiced.

While continuing to pursue grants, raise funds through membership campaigns and special events, the John Gilmore Riley Center/Museum found itself as well taking on an advocacy role on behalf of African American museums in general. Having knowledge that there were other African American museums operating with the same challenges across the state, attention was directed to advocacy on behalf of all including: making trips to meet with the leadership of institutions including the National Trust for Historic Preservation, Institute of Museum and Library Services, Florida Department of State and others to “tell the story-and plight” of African American museums. Also shared was the benefit that was being lost to everyone by not helping to capture, document and preserve this part of American history. Eventually, some doors began to “crack” open, and some opportunities were provided including minority scholarships to make it possible for leaders of African American museums to attend workshops and conferences. Soon, some FAAHPN Directors were writing grants and being successful, and some ultimately were invited and selected to serve on grant review panels. As a result of advocacy, specific African American federal grant categories were established to help address the needs of museums in heretofore underserved communities. Under the leadership of Dr. Janet Snyder Matthews, then Florida Department of State Division of Historical Resources Director, more attention was directed to the Florida African American museums, an advocacy that endured past her tenure and to this day.



Others who participated significantly in the early advocacy were: Ralph Johnson, Architect from FIU in Ft. Lauderdale, Florida; NY Naitheri from Eatonville, Florida and Executive Director of the Zora Neale Hurston Fine Arts Museum; Sandra Rooks, Founder and Executive Director of the Pinellas County African American Museum of History and Culture; Katrina Miles, a former John Gilmore Riley Intern and Employee and later Executive Director of the Lewis Lattimore House Museum in Queens, New York; Brent Leggs, Executive Director, National Trust for Historic Preservation Action Fund; Dr. Janet Snyder Matthews, former Director of the Division of Historical Resources-Florida Department of State; Martha L. Semmel, National Museum Leader and former Executive at the Institute of Museum and Library Services; Joe McGill, Founder and Director of the National Slave Dwelling Project; Dr. Lonnie Bunch, Founding Director of the National Museum of African American History and Culture and current Secretary of the Smithsonian-14<sup>th</sup> {and first African American} and John W. Franklin, Retired Director of Partnerships and International Programs-National Museum of African American History and Culture. “A rising tide lifts all boats”.

As advocacy continued on national levels, so did efforts to organize at home. Noting that African American museums in Florida indeed were not in the “loop” of mainstream preservation programs and initiatives, the John Gilmore Riley Center/Museum Executive Director and staff began holding informal meetings and one-on-one conversations to share ideas and information with individuals and groups that were involved, or seeking to become involved, in Florida’s African American historic preservation efforts.

When a call went out in 1997 for all with interest to meet in Tallahassee to strategize on a path to bring African American museums out of the shadows, over 125 museums, history associations and educational leaders and interested parties attended. This three-day first Florida African American Heritage Preservation Network Conference, later renamed “Field Sessions”, was held biennially from 1999 at various African American museum locations across the State of Florida. Participating were museums that were functioning at various levels from start-ups, small to medium-size, emerging, some institutionally managed but a majority private non-profit museums. Administrators ranged from 55 to 75 years of age, and most had limited formal museum management training. They did, however, have a passion and desire to be keepers of their local community’s oral history, historic buildings, artifacts, and documents. They shared a common vision to revitalize and preserve landmarks and legacies to prevent their loss.



Out of these gatherings and conferences a consortium of thirty museums to this day continues to function as a professional association. The Florida African American Heritage Preservation Network (FAAHPN) is well known for its sharing of expertise, unique ability to connect with history from Antebellum to present and for “Griots” who help to document Black history as a significant part of American history.

The FAAHPN met all official requirements to operate as a professional LLC in 2001 and received its first major donation of \$75,000 that year from the Elizabeth Ordway Dunn Foundation at its FAAHPN conference in Jacksonville, Florida. The Founding Members included: Sandra Rooks, Clifton Lewis, Patricia Whatley, Sharon Coon and Dr. Martha Bireda. In 2009, an appropriation from the Florida State Legislature, through the Florida Department of State, made possible through the efforts of Florida State Representatives Marjorie Turnbull and Loranne Ausley, and Senator Jim Davis of Jacksonville, Florida began and continues to be the major source of funding as a non-recurring grant. Through the years, various Florida legislators have worked diligently on behalf of funding. Notable sponsors include: Representatives Alan Williams, Ramon Alexander, Loranne Ausley, Hazelle Rogers, Barbara Watson, Audrey Gibson and Ben Albritton, and Senators Keith Perry, Bill Montford, Bobby Powell, Jack Latvala, Audrey Gibson, Tony Hill, Wilton Simpson, Alfred Lawson and Tom Lee. The appointment of the Founder and Executive Director, Althemese Barnes, to the National Board of the Institute of Museums and Library Services by President Barack Obama in 2015 played a significant role in opening doors to the history and challenges of African American museums.

From 2006-2020, receipt of grant funds from the Institute of Museum and Library Services (IMLS), the Florida Department of State, Divisions of Historical Resources and Cultural Affairs, Florida Humanities Council and National Trust for Historic Preservation have helped the network to significantly raise the level of involvement of museum directors in state, regional and national preservation programs and initiatives. These agencies also demonstrated broader institutional concern for a more comprehensive approach toward the preservation of these valuable resources, and a willingness to outreach to museum directors who were serving as stewards of “one of a kind” oral histories and collections. Ultimately, the Institute of Museum and Library Services and the National Trust for Historic Preservation established grants specific to African American Museums for use in their historic preservation and museum programs.



This Guide is an effort to address the needs and challenges that face leaders, like the “Baby Boomers” at this point along the journey. Some of the content is applicable as well to any leader who feels the need to mentor and train a new generation to continue this great and necessary work.

Several projects undertaken through the years, and to date, by FAAHPN leaders have made possible enhanced cross-cultural communication, established heretofore non-existing coalitions and engendered creative programs and ideas that have placed these leaders in highly respected, appreciated and valued positions as community historians, preservationists and museum and archive managers. As subject matter experts they contribute significantly to local, state, and national historic preservation programs. To retain and maintain the status and contributing roles of these “niche market” museum institutions, and their leaders, requires pivoting and directing attention to their future sustainability, whether through succession, transitioning and/or re-structuring.



## CHAPTER IV

# FAAHPN Organizational Development Processes, Tools, Strategies and Membership

This chapter focuses on methods, tools, and strategies including partnerships, collaborations and alliances that are important when facing capacity building, personnel and/or infrastructure challenges to sustain the legacy of an organization or institution. The highly technological environment of today, that was not present when many of the FAAHPN museums were founded, makes developing new leaders in these times even more critical. The history and framework of FAAHPN is shared as an example of routes that were taken by this organization to inspire and attract new leaders to the field of museum management and historical preservation. Inherent also was the goal to strengthen current leaders in the planning and execution of projects and programs and enhance their administrative and management skills.

The Framework of the Florida African American Heritage Preservation Network provides specific details of the internal governance structure and internal strategic design of the organization, both of which have sustained it from 1997 to present-2021. From the beginning, the motto: “a rising tide lifts all boats”, and the commonality of purpose and unified agreement with the mission, were important to set a clear vision and expectation.

### What is FAAHPN?

The Florida African American Heritage Preservation Network (FAAHPN) is a LLC with one Managing Member, the John Gilmore Riley Foundation. It is a professional association of African American museums that was formally organized in 2001 out of the John Gilmore Riley House. The initial gathering in 1997 was of museums from across the State of Florida that wanted to expand the reach of their programs and historic properties into state and national presence and prominence. The organization’s establishment was based on the purpose to provide professional and technical support to member museums in all areas of museum management.

The hallmark introductory project of FAAHPN was publication of the *Florida Black Heritage Trail Guide* that was produced in 1997 in collaboration with the Florida Department of State and VISIT Florida. This publication is a comprehensive narrative of historical landmarks and legacies that exist in regions throughout the state of Florida.





Though much of Florida's African American History has been lost, this publication is a combination of what has been lost as well as what remains to be documented and preserved. It has been continuously updated and was the inspiration for numerous created heritage trails, and others that are being created, across the State of Florida.

In addition to support to help produce quality statewide projects, programs and publications that promote tourism and economic development, the FAAHPN museums are provided with the following:

- (1) Technical Assistance as Museum & Historic Preservation Professionals
- (2) Content Development & Management
- (3) Enhancement of Organizational Resource Allocations
- (4) Professional Development for Staff, Board Members & Volunteers
- (5) Information Technology Upgrades through Hardware & Software Integration
- (6) Partnerships as "subject matter expert" for commemorations produced and presented by a variety of organizations, agencies and institutions involving Florida's history
- (7) Grant, Fundraising & Private-Funding Development Training
- (8) Archival Research & Digitization / Consultation for Obtaining Historic Designation
- (9) Creation of Living History Exhibits and Educational Products

## **FAAHPN Organizational Structure:**

### **GOVERNANCE - ARTICLES OF ORGANIZATION:**

Pursuant to the Florida Limited Liability Company Act, Chapter 605, Florida Statutes, the organization has adopted amended and restated articles of organization (the "Amended and Restated Articles of Organization") for the FLORIDA AFRICAN AMERICAN HERITAGE PRESERVATION NETWORK, LLC, a limited liability company.

An exact presentation follows for the benefit of individuals and/or organizations desirous or in need of a sample format:





#### ARTICLE I. NAME

The name of the limited liability company is FLORIDA AFRICAN MERICAN HERITAGE PRESERVATION NETWORK, LLC.

#### ARTICLE II. ADDRESS

The LLC's mailing address and the street address of its principal office is:  
419 E. Jefferson Street, Tallahassee, Florida 32301

#### ARTICLE III. REGISTERED AGENT AND OFFICE

The Company designates 419 E. Jefferson Street, Tallahassee, Florida 32301 as the street address of the registered office of the Company and names Althemese Barnes as the Company's registered agent at that address to accept service of process within this state.

#### ARTICLE IV. MEMBERSHIP

The sole member of the LLC is the John G. Riley Foundation, Inc., a Florida not-for-profit corporation that is an organization exempted from federal income taxation by Section 501(a) of the Internal Revenue Code of 1986 (the "Code") as an organization described by Section 501(c)(3) of the Code (the "Foundation"). At all times, the LLC shall have only a single member, which shall consist of a not-for-profit corporation that is an organization exempted from federal income taxation by Section 501(a) of the Code as an organization described by Section 501(c)(3) of the Code. Pursuant to Section 301.7701-3(b) of the Procedure and Administrative Regulations issued pursuant to the Code, as a single-member limited liability company, the LLC shall be a disregarded entity for federal income tax purposes and, at all times, shall conduct only such activities as are consistent with the charitable purposes and tax-exempt status of its sole member.

#### ARTICLE V. CHARITABLE PURPOSES

The LLC is organized and shall be operated exclusively for charitable purposes within the meaning of Section 501(c)(3) of the Code, and shall engage only in lawful activities that are consistent with the charitable purposes of its sole member and in which organizations that are exempted from federal income taxation by Section 501(a) of the Code as organizations described by Section 501(c)(3) of the Code, may engage. Without limiting the generality of the foregoing sentence, the LLC's charitable purposes include: providing technical and scholarly assistance to organizations and communities that desire to research, preserve, and promote African American history and legacies; and conducting statewide conferences and workshops in Florida to bring together the growing African American historic preservation community.



#### ARTICLE VI. BOARD OF TRUSTEES

All powers of the LLC shall be exercised by or under the authority of the Foundation and the affairs of the LLC shall be managed under the direction of a Board of Trustees.

#### ARTICLE VII. REGIONAL COORDINATORS

The charitable activities of the LLC shall be coordinated through regional coordinators residing throughout Florida, who shall be responsible for helping to carry out the policies and decisions of the Board of Trustees.

#### ARTICLE VIII. COMPENSATION AND INDEMNIFICATION

To the extent permitted by the Operating Agreement and applicable law, the LLC may pay reasonable compensation to a Trustee, regional coordinator, executive director, officer, or employee of the LLC for personal services rendered, so long as the services are reasonable and necessary to carry out the charitable purposes of the LLC. The LLC may indemnify its trustees, regional coordinators, executive director, officers, and employees against expenses and liabilities, to the extent required or permitted by the Operating Agreement or applicable law.

#### ARTICLE IX. CHARITABLE LIMITATIONS

Notwithstanding any other provision of these Articles, the LLC shall not carry on any activities not permitted to be carried on (i) by an entity qualifying for exemption from federal income tax as an organization described in Section 501(c)(3) of the Code, or corresponding section of any future United States Internal Revenue Law, or (ii) by an entity, contributions to which are deductible under Section 170(c)(2) of the Code, or corresponding section of any future United States Internal Revenue Law. No part of the net earnings of the LLC shall inure to the benefit of, or be distributable to, the Trustees, regional coordinators, executive director, officers, or employees of the LLC, nor to any other private persons, except that the LLC shall be authorized and empowered (i) to pay reasonable compensation for personal services rendered to the LLC, so long as the services are reasonable and necessary to carrying out the charitable purposes of the LLC, and to reimburse expenses or advances made for the LLC that are reasonable in character and amount, and (ii) to make payments and distributions to persons or entities that are qualified to receive them in furtherance of the LLC's charitable purposes. All of the net earnings and assets of the LLC shall be expended for purposes stated in Section 501(c)(3) of the Code or the corresponding section of any future United States Internal Revenue Law.



No substantial part of the activities of the LLC shall be the carrying on of propaganda, or otherwise attempting to influence legislation (except to the extent permitted pursuant to an election made under Section 501(h) of the Code), and the LLC shall not participate or intervene in (including publishing or distribution of statements) any political campaign on behalf of, or in opposition to, any candidate for public office.

#### ARTICLE X. DISPOSITION OF ASSETS UPON DISSOLUTION

If the LLC dissolves, the Foundation, after paying or making provision for the payment of all the LLC's liabilities, shall distribute all the LLC's assets to one or more organizations that themselves are exempt from federal income taxation as organizations described by Section 501(c)(3) of the Code, or corresponding section of any future United States Internal Revenue Law. If any of the LLC's assets are not so distributed, the Circuit Court of the county in which the principal office of the LLC is then located shall distribute the remaining assets to an entity that is organized exclusively for charitable purposes and is described by Section 501(c)(3) of the Code, or corresponding section of any future United States Internal Revenue Law, to be used for that entity's charitable purposes.

Dated this day of December 2014.

By: \_\_\_\_\_ Althemese Barnes as its Authorized Representative

### **OPERATING AGREEMENT**

This Operating Agreement ("Agreement") of FLORIDA AFRICAN AMERICAN HERITAGE PRESERVATION NETWORK, LLC, a Florida limited liability company (the "Company"), is made and entered into among the Company and the John G. Riley Foundation, Inc., a Florida not-for-profit corporation that is an organization exempted from federal income taxation by Section 501(a) of the Internal Revenue Code of 1986 (the "Code") as an organization described by Section 501(c)(3) of the Code, its sole member ("Member") effective as of \_\_\_\_\_, 2014 ("Effective Date"), in accordance with Chapter 605 of the Florida Statutes.

1. Formation and Term. The Member has formed the Company pursuant to the Florida Limited Liability Company Act (the "Act"), this Agreement, and the Articles of Organization that were executed and filed with the Secretary of State of Florida effective on January 12, 2006, by the Member (the "Articles"). The term of this Company



commences on the date of filing of the Articles with the Secretary of State of Florida and will continue perpetually, until dissolved in accordance with the provisions of this Agreement.

2. Name. The name of the Company formed hereby and by filing of the Articles is FLORIDA AFRICAN AMERICAN HERITAGE PRESERVATION NETWORK, LLC.

3. Registered Agent, Office and Principal Place of Business. The Company's registered agent and office in Florida will be Althemese Barnes, 419 E. Jefferson Street, Tallahassee, Florida 32301 and the principal place of business is 419 E. Jefferson Street, Tallahassee, Florida 32301.

4. Purpose. The Company is organized to be operated exclusively for charitable purposes within the meaning of Section 501(c)(3) of the Code, and shall engage only in lawful activities that are consistent with the charitable purposes of its sole member and in which organizations that are exempted from federal income taxation by Section 501(a) of the Code as organizations described by Section 501(c)(3) of the Code, may engage. Without limiting the generality of the foregoing sentence, the LLC's charitable purposes include: providing technical and scholarly assistance to organizations and communities that desire to research, preserve, and promote African American history and legacies; and conducting statewide conferences and workshops in Florida to bring together the growing African American historic preservation community. In connection therewith, the Company may engage in and transact any lawful activity permitted under the laws of the State of Florida and any other state of the United States and shall have the power to do any and all acts necessary, appropriate, or incidental to such purpose.

5. Management.

5.1 Management of the Company. The management of the business and affairs of the Company is reserved to its Member. The Member may nominate and appoint officers from time to time to conduct the operations of the Company subject to the directions of the Member. To the extent so authorized, the officers shall have full and complete authority, power and discretion to control the business and affairs of the Company, to make all decisions regarding those matters, and to perform any and all other acts or activities customary or incident to the management of the Company's business.



5.2 Reimbursements. The Company shall reimburse the Member and other individuals for all ordinary and necessary out of pocket expenses incurred on behalf of the Company. Such reimbursement shall be treated as an expense of the Company that shall be deducted in computing the available cash of the Company and shall not be deemed to constitute an allocable share of profits or a distribution or return of capital.

## 6. Board of Trustees

6.1 Appointment by the Member. The Member may appoint a Board of Trustees in to make recommendations and assist the Foundation in implementing the mission and purposes of the Company.

7.1 Appointment by the Member. The Member may appoint regional coordinators residing throughout Florida, who shall be responsible for carrying out the charitable activities, policies and decisions of the Company within their respective regions.

## 8. Events Causing Dissolution.

Except as otherwise agreed upon in this Agreement, the Company will be dissolved upon the first to occur of the following events: the decision of the Member to dissolve; the sale of all or substantially all of the assets of the Company; and any other event causing a dissolution of the Company under the provisions of the Act.

## 9. Bank Accounts, Books and Records, and Accounting Period.

9.1 Bank Accounts. All funds of the Company shall be deposited in a bank account or accounts opened in the Company's name. The Member shall determine the institution or institutions at which the accounts will be opened and maintained, the types of accounts, and the persons who will have authority with respect to the accounts and the funds therein.

9.2 Books and Records. Pursuant to the Act and to the extent applicable, the Company shall keep at its principal office the following records:

(a) A copy of the articles of organization, any amendments, and all corporate documents to which any articles of organization were executed;

(b) Copies of the Company's federal, state, and local tax returns and reports, if any, for the three (3) most recent years; and



(c) Copies of any then-effective operating agreement and any financial statements of the Company for the current and three (3) most recent years.

9.3 Annual Accounting Period. The annual accounting period and the taxable year of the Company shall be the calendar year.

#### 10. General Provisions.

10.1 Applicable Law. The internal law, and not the law of conflicts, of the State of Florida, shall govern the construction, validity, and interpretation of this Agreement.

10.2 Section Titles. The headings herein are inserted as a matter of convenience only, and do not define, limit, or describe the scope of this Agreement or the intent of the provisions hereof.

10.3 Terms. Common nouns and pronouns shall be deemed to refer to the masculine, feminine, neuter, singular and plural, as the identity of the person may in the context require.

10.4 Separation of Provisions. Each provision of this Agreement shall be considered separable; and if, for any reason, any provision or provisions herein are determined to be invalid and contrary to any existing or future law, such invalidity shall not impair the operation of or affect those portions of this Agreement that are valid.

10.5 Amendment. This Agreement may be amended, and compliance with its terms waived, only with the consent of its Member.

IN WITNESS WHEREOF, the undersigned, intending to be legally bound hereby, have duly executed this Agreement as of the day first above written.

FLORIDA AFRICAN AMERICAN HERITAGE PRESERVATION NETWORK, LLC

By: \_\_\_\_\_ John G. Riley Foundation, Inc. a Florida limited liability company

By: \_\_\_\_\_ Althemese Barnes Authorized Representative





## Functionality:

Following in more detail is the internal operation of the organization as it relates to administration, execution of activities, program design and the strategic management plan in accordance with the Articles of Incorporation and Operating Agreement.

**Board of Trustees:** The Board of Trustees makes recommendations and assists the organization in implementing the mission and purposes. Each trustee serves for the term for which he or she was appointed, or until such trustee first dies, resigns, is unable to serve, or is removed. In the event the Member determines not to appoint trustees from time to time, then such failure to appoint does not affect the existence of the organization. The Member with or without cause may remove any Trustee appointed by the Member, whenever in its judgment the best interests of the organization can be served. Any such removal shall be with out of the person so removed.

All Trustees perform their duties in good faith, in a manner each reasonably believes to be in the best interests of the Company, and with such care as an ordinarily prudent person in a like position would use under similar circumstances. Trustees are not liable to the organization or to the Member for any loss or damage sustained by the organization or the Member, unless such loss or damage has been the result of fraud, deceit, or willful misconduct by the Member. Any Trustee may resign at any time by giving written notice to the Member.

**Central Administration:** This office is responsible for planning, coordinating and assuring implementation of the operating policies and procedures of the Network. It also manages cross-project and program communication as it relates to: marketing and promotional activities, notice of meetings, identification and access to sources and resources to support Network projects, programs and activities and serves as an on-going source of connectivity between and within the members and affiliates.

**Regional Coordinators:** The Member appoints regional coordinators residing throughout Florida to help carry out the charitable activities, policies and decisions of the organization within their respective regions. Each regional coordinator serves for the term for which he or she is appointed, or until such regional coordinator first dies, resigns, is unable to serve, or is removed by the Member in its sole and absolute discretion. The respective regions are: Northwest Florida, Northeast Florida, Central Florida, Southwest Florida, and South Florida. Any regional coordinator may be removed with or without cause, whenever in its judgment the best interest of the organization would be served. The regional coordinator is not liable to the Company or to the Member for any loss or damage sustained by the Company or the Member, unless such loss or damage is the result of fraud, deceit, or willful misconduct by the regional coordinator.





**Staff:** Primary responsibilities are to assist with general administrative functions, help to plan and implement the annual Field Sessions, website event calendar content enhancement, maintenance of calendar updates, and response to regional coordinators' requests for assistance. The ideal staff would be: Executive Director (responsible for developing and implementing the overall vision, purpose and mission of the organization, providing conceptual leadership, responsibility for existence of policy and governance documents, assisting with funding of the Network in collaboration with all members and is the liaison between the Friends of the Network and Network member sites). Project/Program Coordinator to develop/coordinate/implement diverse projects and programs. A Development Coordinator to lead in grant writing and fund raising and other resource development, in collaboration with the Executive Director.

Note: There are no FAAHPN salaried positions. Rather, the organization receives an appropriation from the Florida Legislature to support an intern and sub-grants to each active member museum and a line item to cover expenses of support staff and special need consultants including: administrative, financial, programmatic, resource development and special projects.

**Friends of the Network:** Primary responsibility is to be ambassadors and assist with seeking funding for the Network. The ultimate goal is to have a stabilized source of funding while providing for a constant source of giving to support the mission and purpose of the Network.

### **Projects & Programs**

**Next Generation-Up and Coming:** This is the internship program. This program not only provides "hands on" practical application but also professional development to the museum and historic preservation and conservation profession. This internship program focuses on providing insight into the various aspects of Public History and Museum Management as well as meeting the needs of the interns for course requirement, portfolio development and career enhancement. A quarterly stipend is paid to interns from the Legislative appropriation.

**Public History Educational Program:** This program is designed to keep museums abreast of collaborative educational programs throughout the state. Examples: a public speaking bureau, exhibit exchange program, sharing of events via email and other media exchanges, and collaborative planning and presentation of events as practical.

**Research:** Network members are encouraged to partner with Community Colleges and Universities to enhance research of the Black experience. For example: encourage those members who already have a relationship to reach out directly to public history courses for oral history projects, student involvement in living history programs and publicity and



marketing campaigns. Students are directly involved with the museum through research, writing and intergenerational sharing.

**Heritage Tourism:** The FAAHPN seeks ways to increase heritage tourism within the state to include: collaborating with tour companies; engaging the Conventions and Visitors Bureau in the area for membership as well as board member representation, pursuing tourism municipal grants available in the area and marketing collectively network sites as a package and niche market cornerstone to increase tourism and network site visitation. New technologies such as the GPS mapping, Mobile App increase visitor experience and web enhancements attract new audiences.

**Management and Information:** To ensure that members continue to stay abreast of the best practices, at least two Network member site workshops “field sessions” are held per year. Every other year is designated for a meeting of active Network Museum Directors and takes place at the annual Association of African American Museum Conference. The conference/field session committee consists of: 2 member museum administrators, the Headquarters Director, Executive Director of host site (or an appointed staff) and Friends of the Network host site.

**Membership** – Fully operating African American Museums constitute the official FAAHPN organization (must have a location, contact source, projects and programs provided for a minimum of 180 days annual and adhere to legal governance as provided and required by the Florida Department of State Corporate Office). Membership dues are \$100 annually. However, lack of a membership does not preclude services, though such will be of lesser benefit than for full members.

Membership provides:

- ❖ Priority on statewide historical programming
- ❖ Professional and technical assistance
- ❖ Inclusion in mobile application
- ❖ Eligibility to host statewide meeting and/or bi-annual conference
- ❖ Membership spotlight on the Network’s website
- ❖ Special services and recognitions as determined by the Central Administration

A membership in FAAHPN has become a coveted position for museums at various levels of operation. The benefits that are derived and the positive view of the FAAHPN as a statewide preserver of African American history have proven to be advantageous and enhance the value of participating museums on local, state and national levels.



## Nuts and Bolts:

Behind the governance and other important legal and administrative policies and procedures, and the vision and desires of many museum founders and other leaders that followed, are the ingredients that have **“made the FAAHPN work”**. Given that the involved museums were operating on very limited budgets, it was important to have consensus as to what and what was not the role of FAAHPH. It was paramount to clarify that professional development and technical support to “create and enhance projects and programs that would demonstrate the value of FAAHPN museums to mainstream historical preservation state initiatives” was the primary goal.

There was clear understanding that participating museums were responsible for resource development to support their individual organizations. However, funds acquired through grants or other means in the name of FAAHPN would accrue to the benefit of all and would be shared in a proportionate manner. This approach has been one of the most contributing strategies in that collectively museums know what to expect and have found it not only necessary but beneficial to take an active role in all funding pursuits. Simultaneously, having the notoriety of membership in FAAHPN has been a positive leveraging tool used by museums to independently seek and secure funding through local, state and national grants and traditional fundraising channels.

The next most important step was agreement on the following goals and objectives.

### Goals:

- To identify all groups engaged in African American historical and cultural preservation.
- To enhance awareness of and offer an opportunity to share information and resources of local, state, region, and national funding.
- To provide continuing education for well-established and fledging organizations supported through funding made possible through private and public sources.
- To develop a website and a marketing strategy that is current and available to all.
- Develop a resource exchange for members.
- Develop supportive programs for the network based on informal and formal needs assessments, and outcomes from the African American Network Conference.
- Provide a “brain trust” to strengthen and support the network.



### **Objectives:**

- To build a consortium of existing and emerging museum and cultural organizations that is engaged in exhibiting, collecting, researching and interpreting the history, culture and heritage of African Americans throughout the state.
- To build the capacity of these organizations to develop and implement local projects and to increase their participation in mainstream preservation initiatives and programs.
- To serve as a liaison between these organizations and other state, regional and national historic preservation initiatives, and maximize resources that are needed to assist them in their work.

An initial activity at the point of organizing was to survey the museums. This survey identified a wide range of capabilities as well as needs. The initial survey yielded 37 responses identifying needs ranging from professional leadership and skill development training, technology acquisition and training in collection acquisition, preservation, and archival management techniques and resource development.

During its formative years, computer technology was entering the scene as a major means of communicating. By no means were a majority of members even in ownership of this new connector to the world, less more skilled in their operation. In 1997, while many in society were “surfing the net” or were “on the super highway”, such was not the situation for the FAAHPN museums. Again, most had no computer, and the few that did were not skilled or proficient in this newfound revolutionary primary means of communicating. This led to the first major project of FAAHPN, securing a grant to purchase twenty computers, contract a technician to travel to each site to set up the equipment and conduct a tutorial with the museum staff. To this day, some Executive Directors look back with pride and appreciation for this project that whetted their appetites and introduced them to the world of technology.

The next area of need was strategic planning which by in large was none existent. An early grant that was secured from the Elizabeth Orday Dunn Foundation enabled the leadership to conduct a three-day training during which a professional strategic planner, Arnell Willis Bryant, introduced the concept and assisted five museum directors in developing their plans. Using a “train the trainer” model, the Directors were charged to spread the lessons to other museums in their regions. The initial benefiting Executive Directors were:

- L.B. Brown House Neighborhood Improvement Corporation (Clifton Brown,



Director), 790 Waldo Avenue, Bartow, Florida 33830

- Wells' Built African American Museum (Geraldine Thompson, Director), 511 W. South Street, Suite 100, Orlando, Florida 32805
- Pinellas County African American Museum (Sandra Rooks, Director) 1101 Marshall Street, Clearwater, Florida 33755
- Tajiri Arts Inc. (Patricia Whatley, Director) 519 Palmetto Avenue, Sanford, Florida 32771
- John Gilmore Riley Center/Museum (Althemese Barnes, Director) 419 East Jefferson Street

**Two Associate Cultural Organization Participants were:**

- Tots N Teens and James Weldon Johnson Heritage Trail, Jacksonville, Florida
- Renaissance Park – Marianna, Florida

Simultaneously, other Florida Museum Directors continued to receive technology, equipment and training, information regarding grant opportunities, as well as responses to inquiries involving specific programs and initiatives planned. Additionally, a total of 22 Directors received fully paid scholarships to attend the 2005 three day 7<sup>th</sup> Florida Biennial African American Heritage Preservation Network Conference in St. Petersburg, Florida, hosted by the Office of the Mayor. Most had attended the FAAHPN conference since its inception in 1997, while others were able to attend for the first time as a result of the cost being underwritten, again with funds from a grant from the Elizabeth Ordway Dunn Foundation. The agenda was targeted to issues, challenges, and opportunities that were important to function effectively as local cultural and historical organizations. Specialists in the areas of governance, finance, operations management and other critical areas made presentations as a way to help upgrade the skill set and knowledge of the attendees to ensure compliance with rules, laws and requirements of the field.

Next along the route was a follow up session where the first group of five Directors participated in three formal 4-day training sessions. The first was held in Tallahassee, Florida, hosted by the Riley House Museum, on December 10<sup>th</sup>-14<sup>th</sup>, 2006 at the Tallahassee Community College (TCC) Downtown Center. The second was held in Jacksonville, Florida from January 15<sup>th</sup>-18<sup>th</sup>, 2007 at the Ritz Theater and LaVilla African American Museum. A third session convened in Orlando, Florida on June 15<sup>th</sup>-18<sup>th</sup>, 2007 at the Wells' Built African American Museum. The sessions were intentionally held in various geographic areas of the state in order to allow the Directors to visit each other's sites and have the experience of interacting with Directors of other African American and

mainstream museums as part of their professional and skill development training. Two



Directors made volunteer return trips to the LaVilla Museum with members of their Board of Directors so that their governance leaders could see the progress of this very well established City of Jacksonville owned and operated African American museum. Later in the year, three of the FAAHPN Museum Directors attended the 3-day Southeast African American Alliance Conference (AAPA) in Augusta, Georgia as a way of broadening their knowledge of museums and historic preservation management. Two of the Directors applied and were awarded diversity scholarships to attend the October 2007 National Trust for Historic Preservation Conference in Minnesota. Others received scholarships in subsequent years enabling them to enhance their professional and technical skills in the museum field.

A main focus during the early years was to have Directors develop and/or fine-tune their governance documents, become familiar with grant sources and grant writing techniques, obtain information about the tools, strategies and benefits of partnership/collaboration development, enhance ability to do fund development in accordance with non-profit and 501(c)(3) regulations and acquire knowledge of Constitution and Bylaw development, board issues, and exhibit and educational product development. In between formal sessions, technical assistance was provided mainly via telephone calls, and site visits as feasible.

As training continued and skill sets and knowledge increased, several Directors followed through on preparing and submitting grants to various funding sources. Several communicated regularly with the FAAHPN Project Director at headquarters in Tallahassee as they made efforts to develop partnerships with local public officials and other potential partners. An interesting and productive occurrence was that Directors voluntarily began attending each other's exhibit openings and other cultural events. Not only did they attend, but, they took part as speakers and presenters. The FAAHPN Directors reached out and took on more expanded roles as their skill levels increased and they felt more competent of their abilities as 20<sup>th</sup> century museum managers.

During its early years, the need for collections care and management surfaced as another critical area that needed attention. Many FAAHPN museums were the holders of one of a kind historical photos, documents, objects and artifacts that told the story of African American life in Florida. Most of these collections were in manila folders in file cabinets. A grant from the Institute of Museum and Library Services (IMLS) in 2008 and

2010 brought Collections Care and Management and archival training to the FAAHPN. As





a result of these grants, archival products were provided to Directors and an archivist, Dr. Anthony Dixon, consultant and one of the interns worked with the sites to provide training in inventorying, cataloging and storage of historical collections. An ultimate goal was to provide all museum directors with this training. *A Guide to Museum Competencies* was produced, assisted by content developer Julianne Hare. A copy was produced and given to each FAAHPN site. Subsequently, Tallahassee Community College restored a space in its library to house the Riley Archive and provided for a part time manager, Torrio Osborne.

The overall goal of FAAHPN has always been to empower the participants by increasing their knowledge and raising confidence to navigate in the larger museum world. Now, in 2021, it can be said that the FAAHPN commonality of purpose, collaborative participation and the desire to “come out of the shadows” and validate the significance of African American museums can be declared a success. Resources that were made available on the local, state and national levels, beginning with the Elizabeth Ordway Dunn Foundation in 2001 and followed by the Institute of Museum and Library Services, National Trust for Historic Preservation, Florida Department of State and municipalities, the latter generated by individual member museums, has had a significant impact on this success.

In 2009, recognizing the value of the FAAHPN to the State of Florida and its historical and cultural initiatives, the Florida State legislature began providing a non-recurring appropriation that continues to this day. These funds make possible sub-grants to the FAAHPN Network museums and support one intern at each site, assist with contract and consultant fees for projects, program development and implementation and support other needs e.g. a web professional to design and manage the FAAHPN website, social media activity and marketing initiatives. Individual members have utilized FAAHPN participation to leverage local, state and federal grants for their individual museums. A directory and Map of FAAHPN museums and their programs can be viewed at [www.faaHPN.com](http://www.faaHPN.com) and on individual museum websites.

Another benefit of FAAHPN is how it has contributed to the growth of the next generation of museum managers, historians, urban planners, archivist, anthropologists and researchers; this cannot be over stated. Across the state, since inception, students have been included as an integral part of FAAHPN programs. Their presence provides museum directors with much needed technology, social media, audience enhancement skill sets and support. Their knowledge of social media platforms, pooling of intergenerational material resources, state-of-the-art technical knowledge, intellectual and spiritual energy has proven invaluable and a complement to the seasoned, learned, mature and more academically accomplished FAAHPN Directors and their staff.





## FAAHPN - Prerequisite for Membership:

A final and significant part of FAAHPN is the base-line entry requirement for membership. There are specific pre-requisites. Many organizations, including historical societies, cultural centers and history programs, have sought membership. However, the agreement by Trustees and the membership sets specific requirements that a museum must meet to become and remain a FAAHPH member. These are based on the premise that certain competencies are necessary to ensure manageability and effectiveness of the organization. The criteria are designed based on pre-evaluation that a museum has the capability to implement the stated goals and objectives. The required member profile, including some demonstrated examples based on the structure of the John Gilmore Riley Center/Museum to help clarify, is as follows:

**Mission and Purpose:** The mission and purpose of the FAAHPN museum is to preserve, conserve, and document African American history and to share that history through education, tourism and outreach. It has a permanent location, is accessible by telephone and electronically, is open to the public for viewing on a set schedule that comprises 180 days annually. It produces and receives historical exhibits for purpose of study, education and enjoyment, utilizes material evidence of people and environments during specific periods to convey history, maintains a collection that is accessible to the public and shows evidence of conducting research to further the expansion of historical content and acquisition of material culture.

**Principles:** The museum is expected to:

- observe accepted standards and laws
- uphold the dignity and honor of the profession
- safeguard the public against illegal or unethical professional conduct
- use every opportunity to inform and educate the public about the aims, purposes, and aspirations of the profession and cultivate a better public understanding of the contributions of museums to society.

Reference: paraphrased from The International Council of Museums (ICOM).

**Strategic Planning:** The museum must have a written plan that helps to guide the organization in all areas of museum management. Following are suggested content that plans should address:

- Application of professional standards in its operation
- Identification of strengths and weaknesses, opportunities and threats
- What the organization offers as a “unique” one of a kind presence and what it provides to its community and clientele



- Methods to examine growth, anticipate new challenges and planned strategies to address current and evolving environmental and societal changes
- Benchmarks for future planning and current program implementation
- The ability to assess the best use of its resources to meet the needs for the present and into the future
- Identification of its most productive areas, and an outline of current internal and external resources that will help to fulfill the mission and meet goals and objectives

### **Strategic Plan Key areas:**

Name of the Organization:

Short and Long-Range Planning:

Dates to accomplish: Three-Five-Ten Year Suggested

Principal Implementers/Stakeholders:

Executive Director

Board of Directors

Parent Organization

Community at large

Political Arena

Educational Institutions

**A mission Statement:** Why do you exist? What do you want to accomplish at the end of the day? What is the task that you attach special importance to?

Example: Riley's mission is to preserve and celebrate the history and culture of African Americans in Leon County from the period of Reconstruction through the Civil Rights Movement (1865-1968) and promote the preservation of other historical treasures in Florida through education, outreach and advocacy.

**Vision:** What do you see in the Future for your organization? Where do you see yourself in one, five, 10 years? What would you like to become?

Example: 1996 - We seek to become the premier heritage attraction of the Capital City, nationally recognized for its high quality of exhibits, programs and community involvement.

Change - 2008: We seek to continue serving the Capital City as a premier heritage destination, nationally recognized for our high quality of exhibits and programs and community involvement.

Change - 2018: We are a premier subject matter administrative and programmatic consultation resource and subject matter expert to agencies and institutions available to and providing services to statewide historical and cultural preservation initiatives, and beyond.



**Organization Values:** (Qualities conveyed to constituents and clients)

Example: Riley Center/Museum business affairs are managed in an atmosphere of trust, respect, integrity and pursuit of excellence. The highest quality of service is provided to our visitors and community. An atmosphere of equality, self-respect and personal fulfillment is maintained.

**Services Provided:** Examples:

- History education
- Community and statewide historical and cultural outreach
- Collection and exhibition of historical artifacts
- Local, statewide and national conferences, workshops lectures, seminars and meetings
- Historical research
- Consultative service
- Non-circulating research library
- Archival repository
- Student Internships
- Volunteer Opportunities

**Measures of Success:** Examples:

- Volume of annual visitors – on and off-site
- Size of membership
- Value of contributions
- Asset value and volume of permanent exhibits/collections
- Number of visits to website
- Number of educational outreach events and contacts
- National/State recognition for quality of exhibits and programs
- Number of collaboration efforts

**How We View Ourselves:** Examples:

- A historical/educational organization open to the public
- Professional staff committed to raising community awareness through education and exhibits
- Largely volunteer-supported organization with focused community appeal and influence
- Repository for significant historical records and information
- Positive community support
- Fiscally responsible



**How We Are Viewed by Others:** Examples:

- Prominent local historical site
- Expert resource center for African American education, culture and history
- Rapidly-growing recognition by general public, business community and tourism organizations
- Innovative, new programs appealing to broad public market
- Fiscally responsible

**Target Audience:** Examples:

- Residents of Leon and surrounding counties and the State of Florida
- Visitors and tourists to Tallahassee and environs
- Educational institutions, government agencies, businesses, cultural enthusiasts, scholars, researchers and historians
- Local, state and national media

**Comparable Destinations:** Examples:

- FAMU Black Archives
- Knott House Museum
- Museum of Florida History
- Tallahassee Museum of History and Natural Science
- Lemoyne Art Gallery
- Gadsden Art Gallery
- San Luis Mission
- Goodwood Museum and Gardens

**Organizational Assessment:**

• **Facilities:** Example

The John Gilmore Riley Center/Museum operates a very extensive exhibit and research program within the walls of the historic Riley House, in its Visitors Center and from a satellite branch extension at Tallahassee Community College (Riley Archive). The Riley House is located in downtown Tallahassee and is the only African American owned historic, national register designated property, in the area. It is two blocks from the courthouse and three from City Hall and the state capitol. Located on the corner of Jefferson and South Meridian Streets, it is a 2-story house-2444 sq. On 1/3 shaded acres. The Riley House has:

- Three downstairs exhibition rooms and one gift shop room
- Three upstairs workrooms and a supply/kitchen area
- Two bathrooms, one on each floor
- Handicapped parking and accessibility
- Parking for seven vehicles

- National Register of Historic Places designation (1978) and local designation (2000)



- A Visitor Center 2,444 square feet constructed in 2014 and opened in 2015.

**Organization Chart: Positions and Employees:**

- Executive Director (Dr. Aron Myers)
- Director of Marketing (vacant)
- Office Manager/Bookkeeper (Felicia Miles)
- Director Programs/Projects (Catiana Foster)
- Institutional Development Director (vacant)
- Education Director (Paige Lee)
- Riley Archive Management (Interns and Torrio Osborne)
- Exhibition Curator and Artist-in-Residence (Eluster Richardson)
- Student Interns (TBD)
- Accountant (Spencer Ingram)
- Pro Bono Law Firm: Holland & Knight

**Profile - (Infrastructure, Core Components): Examples:**

**√ Strengths**

- Salaried Executive Director and Education Director/Assistant Director (effective September 2020 under auspices of the City of Tallahassee, Division of Parks and Recreation)
- Full maintenance and infrastructure support as a program of the City of Tallahassee, Division of Parks and Recreation, effective September 2020
- Strong support from Board of Directors
- Functioning volunteer committees
- Dedicated and highly trained staff
- Community involvement and positive reputation of Executive Director and Founder/Executive Director Emeritus
- Museum holdings, storage and research facilities

**√ Weaknesses**

- Limited private investment
- Few major benefactors
- Unsalaries staff positions (Projects and Programs Coordinator, Resource Development Officer and Office Manager/Bookkeeper) - grant supported
- Limited financial reserves
- Need for fund development strategy and implementation

**√ Opportunities**

- An attraction for tourism and economic development



- Partnerships for history programs
- Facilities expansion - City of Tallahassee Smokey Hollow Village Historical Park adjourns the Riley House property – four-acre space with interpretative markers, spirit house structures of the period, misting fountain, cultural “foodie” gardens, a gazebo and restroom accommodations
- Participation in philanthropic pursuits that benefit the entire community
- Collections acquisition and space in the Riley Center/Museum Archive located in the Tallahassee Community College Main Library
- Development/distribution of educational materials and strong Leon County School Board partnership
- Board representation that includes a member from each governmental body: School Board, City and County Commission

#### ✓ Threats

- Future funding to support unmet municipal needs
- Need for staff devoted to public financial support and grant writing

#### Strategic Issues:

- Continued execution of plan with a goal to grow in community donor base of support
- Maintaining present level of visibility and value
- Retention of municipal infrastructure support and a solid John Gilmore Riley Foundation Board
- Continuance of municipal and institutional support long-term

### Strategies for Success – Plan for Implementation

#### Goals and Objectives: Example:

- Goal: To be a premier institution of excellence providing leadership in historical and cultural preservation organizing and programming.
- Objective: Execute projects and programs to reach national markets.

#### Strategies:

- Plan and develop exhibits and publications focused on topics heretofore unknown, even to many locals. {Timing 2010-2025; Financial Source-internal and external funding}
- Increase awareness of programs and research holdings {Timing 2008-on-going; Financial Source-internal and external funding}





- Continue providing leadership to other African American historical and cultural preservation organizations (Timing 2008-on-going; Financial Source-internal and external funding}.
- Serve as a resource and liaison to mainstream and other global cultural initiatives, organizations and institutions {Timing 2008-ongoing; Financial Source-internal and external funding}
- Seek associations with other organizations of national prominence {Timing 2008-ongoing; Financial Source: internal and external funding}

Responsibility: Executive Director & Staff

### **Objectives:**

- Sustain local, statewide and national recognition for excellence in exhibits and programs.
- Acquire, preserve, catalog and exhibit objects, collections and documents for research and publication.
- Reach annual museum attendance of 5,000 annual visitors and exhibit's exposure to 200,000 -500,000 individuals
- Increase financial stability – create/grow an endowment

### **Governance-Institutional Standing:**

- Ensure that the museum has a written and published constitution, statute or other public document, in accordance with national laws that clearly state the museums' legal status, mission, permanence, and non-profit nature.
- Prepare, publicize and be guided by a statement of mission, objective, and policies of the museum and of the role and composition of the governing body.

### **Physical Resources:**

- Ensure and maintain adequate premises with a suitable environment for the museum to fulfill the basic functions defined in its mission.
- Ensure that the museum and its collections are available to all during reasonable hours and for regular periods.
- Ensure that institution standards of health, safety, and accessibility apply to personnel and visitors.
- Develop and maintain policies to protect the public and personnel, the collections and other resources against natural and human-made disasters.
- Ensure appropriate security to protect collections against theft or damage

### **Financial Resources:**

- Ensure that there are sufficient funds to carry out and develop the activities of the museum.





- Develop written policy regarding sources of income that it may generate through its activities or accept from outside sources (Museums should not compromise the standards of the institution or its public) (Tobacco, alcohol grants, etc.)

### **Personnel:**

- Ensure that all actions concerning personnel are taken in accordance with the policies of the museum and legal procedures.
- Appoint the Director or head of the museum and provide oversight for effective and efficient administration and management of the museum.
- The director or head of a museum should be directly responsible, and have direct access, to the relevant governing bodies.
- Provide adequate opportunities for continuing education and professional development of the staff.
- Have a written policy on volunteer work, outside employment, time, and other aspects that impact the proper functioning of the museum or institution.
- Ensure that volunteers and staff, when conducting museum tasks and activities, are fully conversant on the Riley Museum Policies and Procedures
- Never require museum personnel to act in a way that could be considered a conflict with the provision of any national law or specialist code of ethics

### **Displays and exhibitions:**

- Should be in accordance with the stated mission, policy and purpose of the museum
- Should be well founded, accurate and give appropriate consideration to represented groups of beliefs.
- Should be void of questionable origin or lacking provenance
- Should be well—funded, accurate and give responsible consideration to academic disciplines, societies, or beliefs presented. Museum publications should not compromise the standard of the institution.

### **Publications:**

Information published by museums should be well founded, accurate and give responsible consideration to the academic discipline, societies, or beliefs presented.

### **Collections:**

The governing body is responsible for ensuring that the museum holds collections in trust for the benefit of society and its development. Specific care and management include the following:



- ✓ Museums must conform fully to international, regional, national or local legislation and treaty obligations and comply with any legally binding trusts or conditions relating to all aspects of the museum, its collections and operations.
- ✓ Collections are utilized to support academic endeavors and enhance public relations. Policies are very important; they justify the rejection of the material while encouraging collaborative efforts among museums and archives. Selection and receipt of items of material culture methods include: gifts, loans and purchases.
- ✓ Appraisal: The expense of the appraisal is “supposed” to fall on the hands of the donor; however this is not normally the case. Deposits are usually frowned upon because the institution does not own the collection, yet, they are nonetheless responsible for its care.
- ✓ Deeds of Gift Agreements: These are important to clarify the ramifications for the donation as well as its future usage and housing.
- ✓ Setting Priorities in Collection Development include:
  - a) Purpose: what will be its usefulness?
  - b) Users: who will be using the collections primarily?
  - c) Subject: the subject is decided upon levels, however it is a general rule to maximize the potential usage of the collections for a public institution.
  - d) Format: print or electric? CD-ROM or Web, External hard drive.
- ✓ Acquisition:
  - a. Winnowing: Be realistic about what you can afford to maintain monetary wise as well as proper management.
  - b. De-accession: process of “weeding out” materials- points to consider:
    - ✓ Archival/museum scope or mission
    - ✓ Maintenance
    - ✓ Usefulness for research, exhibition or educational programs
    - ✓ Duplicates
    - ✓ Importance, incomplete, poor, or inauthentic
    - ✓ Deteriorated
    - ✓ Illegally acquired or ethical issues
    - ✓ Donor restrictions
  - c. Disposal Options
    - ✓ Donation to another museum, library, or archive
    - ✓ Exchange with another nonprofit or museum
    - ✓ donate to education or research
    - ✓ Physical destruction
    - ✓ Private sale or public auction
    - ✓ Return to donor

While one size does not fit all, adherence to these as qualifying standards for



membership in FAAHPN has resulted in a more manageable organization of like minds, purpose, expectations and sustainability. As museum directors developed their knowledge and abilities, confidence and determination was progressively enhanced, noted and manifested. Commonality of goal and purpose, visionary and willing leaders and a commitment to succeed together, has resulted in the actualization of the idiom, “A Rising Tide Lifts All Boats”.



## **CHAPTER V**

### **John Gilmore Riley Center/Museum, Inc.**

#### **Planning, Mentoring, Coaching and Training for New Leadership**

#### **The Move Forward**

There comes a time when the future and what it holds becomes a concern for an organization. For museums, such as some in the Florida African American Heritage Preservation Network (FAAHPN) and individual member sites like the John Gilmore Riley Center/Museum Inc. (JGRCM), the reality to face is what happens to the visioning, planning, hard work preserving a historic property and establishing programs should the doors close. The how, what and steps to prepare for new leadership at this point must take on a critical importance.

For the JGRCM, it took two attempts to reach a viable solution. A ten-year period of planning, searching colleges and universities and other museums, volunteer and partnership evaluating and assessing, intentional review of links to personnel resource pools, Board Retreats and workshops were undertaken in preparation for the inevitable - exodus of the senior leader, Founder and Executive Director who had served the organization for twenty five years. In September 2020, the goal was reached bringing new leadership to sustain the JGRCM and its legacy in perpetuity. Involved in the process were successes, lessons learned and helpful tools and strategies that were developed along the way. These are shared for the benefit of other organizations that find themselves faced as well with this reality.

Transitioning to new leadership has several components. It begins with recognizing the time has come. What appears as hesitancy to change on the part of some Founders, or long tenured Executive Directors, is sometime labeled Founder's syndrome, or a refusal to give up the position. However, what some characterize as "Founder's Syndrome" is often more a concern that adequate planning has not occurred to ensure that the organization is prepared for the next leader, rather than a feeling of "entitlement". This is especially true where a Founder has served over a period of years, feels and has expressed to the Board sincerely that it is time; but "what is the plan"? There is a time when change is needed to survive for the sake of the organization and the community. Where the Executive Director possesses most of the historical knowledge of an institution, and there is no understudy, it is even more important to give serious thought not only to the legacy of the individual but also the survival of the historic facility and the organization. What would the adverse impact be on the community, state and nation if the organization no longer existed?

There are "give and takes" in the transition process. Arriving at the best plan forward can be filled with complexity, ambiguity, and emotional chagrin and oftentimes fear for



what lies ahead. Assessing the situation, planning, and unity are key to more effective and efficient change - and sometimes even to a complete restructuring. To make the change a more palatable and none “gut-wrenching” experience, an important first step is to agree upon a unified plan that puts the best steps forward in an orderly, objective and responsible fashion. The decision or process is not one for the Executive Director or Board Chairman to undertake or implement unilaterally. However, a Founder, and especially one of long tenure, has institutional knowledge that can bring significant value to the process. Many holding leadership positions in the Florida African American Heritage Preservation Network (FAAHPN) museums fit this mold – Founder/Executive Director or having served for over twenty plus years. They can bring significant value to future plans for their organizations. To quote a statement in an article “Notes on Nonprofits” in the Tallahassee Democrat on March 28, 2021 by Kelly Otte, a founder of numerous Non-profits, *“Founders breathed life into every nonprofit you ever worked with, volunteered or received services from, donated to or even slightly knew their name. Founders find a gap, have an idea to fill the gap, then take a kernel of an idea and figure out how to bring it to life. They are entrepreneurial, dedicated, determined and often quite fierce.”* These are valuable traits to be respected and included in meaningful ways within the process of training, mentoring and undertaking a transition to new leadership or a restructuring of the organization. At the end of the day, however, to achieve success the journey should involve all who (1) are and/or have been vital to the organization’s history and operation, (2) are astutely aware of the mission and purpose, (3) are dedicated to and appreciate the legacy, (4) realize the value of the organization and (5) possess a commitment to see the organization continued.

An initial and significant step in the process for the John Gilmore Riley Center/Museum was an assessment of the organization by an independent and reputable museum professional: the beginning, growth, operation and administrative structure and programs, current level of functioning and recommendations of “steps forward” to achieve the goal successfully.

The John Gilmore Riley Center/Museum engaged such services through the Institute of Museum and Library Services in the form of a MAP review (Museum Assessment Planning Grant). The Founder/Executive Director, the Board, Volunteers and Community members-at-large, including former visitors and persons who had served on Riley Center/Museum committees, all engaged in the process. A copy of the results of that activity, though engaged in several years ago, is included at the end of this Chapter based on the relevance of its content today. In fact, it was utilized as one of the references during the recent successful restructuring that led to new leadership accomplished at the

JGRCM in September 2020. While techniques in organizational leadership and development may bring about some new strategies over time, baseline attributes tend to remain steady as it relates to areas of administrative and management techniques.



Taking the route of a MAP review was extremely helpful. The process can be helpful even to organizations not seeking to transition leadership but have interest in an independent quantitative and quality analysis of their organization. It is important to share also that implementing the recommendations from a review such as MAP may vary from a short-length of time to reach the goal, or more time needed in the best interest of the organization as was the case with the John Gilmore Riley Center/Museum (JGRCM). Again, however, the assessment of an independent reviewer cannot be over-rated for its value.

A challenge for the JGRCM, an African American private non-profit, was finding an individual with dedication to the mission and purpose, had the knowledge and skill set to grasp and implement a myriad of projects and programs of a “first” African American community based museum in a Capital city and understood the necessity to generate and sustain a salary as the leader of a non-profit and raise and/or lead the staff in fundraising to meet other financial needs including funds to hire and retain staff, maintain the safety and stability of the infrastructure while assuring that the quality reputation of the organization remained intact. This, for the John Gilmore Riley Center/Museum, presented a significant change to stability in the leadership role. The Founder/Executive Director, having established the museum after a thirty-year retirement from state government, had other means of compensation and was thus positioned to serve as a philanthropic Leader – non-salaried. This is significant, particularly as it relates to museums challenged in the area of resource development. Many African American museums, in particular, and other small private non-profit museums may find this applicable. Several of the baby boomers at the helm of Florida African American museums sacrificed/are sacrificing in this manner as well (non-salaried), out of a desire and commitment to fill the gap and preserve African American history in their communities.

Other important considerations in the process of transitioning, and/or restructuring, as was the case with JGRCM, involve assessing and ensuring that current written policies and procedures exist, that a cadre of supportive partnerships have been developed and cultivated and a strong Board of Directors is in place to help vision, plan and execute. In existence should be: personnel and facility maintenance plans, up-to-date financial and legal governance documents and an established unified goal that has been agreed to by all involved. The existence of institutional mechanisms and resources sufficient to ensure organizational stability throughout the process and into the new

administration are also important. In the long term, throughout the process, those involved, mentors and mentees alike, must be committed to “stay the haul” and see, hear and feel the compelling need to sustain the organization, and its stated goals, mission and purposes, in perpetuity.





## Preparing, Planning and Implementing:

Re-structuring was the ultimate solution for JGRCM. That can be traced in large part to a strong partnership relationship that was engendered, cultivated and maintained with the municipal government. Since inception, the Board of Directors has included representation from each branch of government (city, county and school board). A part of the administrative function has been a calendar that includes periodic meetings with community leaders, including governmental officials, to share the assets of the organization and benefit to the community. Many projects initiated by the JGRCM were intently focused on trails, research, exhibits, convening of meetings and conferences of statewide and regional participation and a tour program. These were of direct benefit to the city and county in the way of heritage tourism, community pride and engagement, historical and cultural programming and as another economic engine. The consistent messaging focused on the unique history of the John Gilmore Riley House: a National Register property and the only of its kind in the Capital City/County and its value as an irreplaceable civic, social, educational and economic asset. A well-developed strategic plan, up to date administrative and financial procedures, a governing board that was willing to work together in the best interest of the organization, a history of quality programs and accountability were positives that helped and sustained relationships over twenty-five years. Equally also was demonstrated proof of the organization's recognition as a local, state and national leader in developing and delivering high-quality programs that generated new audiences and revenue. This combination, and a Founder/Executive Director who was approaching close to twenty-four years after an earlier thirty-year state government retirement, evidenced that the time was right for new leadership.

Recognizing and agreeing that it was time to seriously address the need for new leadership was a first step. An assessment to identify what that would mean for the organization, the key areas that needed focus and the action steps necessary to develop a plan while facing the reality of possibly not finding a solution - all were part of the mix moving forward. The loss of institutional history was key in the thought process. Consideration of the legacy, what the organization meant to the Board of Directors, the community, partnering institutions and agencies, and ultimately the sincere questions: who cares, what is the lost or gain as a result of the decision, the impact of closing the doors to the first African American historic house in the capital city of Florida to be listed, in 1978, and the second in the State, in the National Register of Historic Places and the only such home in downtown Tallahassee. Would it be missed? What vacuum would be

created in the community for educational institutions, researchers, the media and others should this niche of heritage tourism hub be removed; what of the historical and cultural preservation programs as an anchor to diversity in the community that would no longer exist? The answer to these questions led to a determination that it was indeed time to forge ahead. But, what would that look like - this process of change?



The organization already possessed a very positive and comprehensive portfolio including an incumbent who was willing and able to play a full role to help connect the dots. Having gone through an earlier succession that resulted in Marion McGee serving as Executive Director for two years, it was agreed that a substantive evaluating of resources to sustain the leadership position and compatibility of human and physical sources were key considerations to the process moving forward. Given all that was known, the answer for the John Gilmore Riley Center/Museum was to capitalize on a long existing alliance, one with shared goals and interest, to bring aboard new leadership and additional resources. Drawing upon all of these factors, indicators, extensive sustained partnership relationships and a clear assessment of the need and what it would take to preserve the legacy in perpetuity, the route taken was to restructure the JGRCM under the ownership and auspices of the City of Tallahassee, Division of Parks and Recreation. Included and foremost in the process was drafting a legal Memorandum of Agreement between both entities assuring and codifying that the mission, goals and purposes would be maintained. A change to the mission and purpose and use of the facility by the new owner would trigger a reversal clause that returns the historic house and programs to the original owner, the John Gilmore Riley Foundation. Both parties were intimately involved in the agreement process, both informally and formally. A public announcement was made in City Commission meeting with Board members present to receive a resolution of transfer.

Thus, the uniform vision, goal and commitment of each party to preserve the historic Riley House, and the legacy created by the Founder/Executive Director, and to demonstrate a long-term dedication to value and preserve ALL of the city's history, was realized and accomplished by this official action - restructuring. Resulting was the first two fully salaried with benefits positions (Executive Director and Assistant Director) and assumption of responsibility for infrastructure care and operating expenses, by the City of Tallahassee. Again, key elements were the initial agreement to proceed, an independent professional assessment of the organization with suggested recommendations and two entities with like goals and committed resolve to preserve the legacy for the benefit of the community. Following is a copy of the John Gilmore Riley Center/Museum's MAP (Museum Assessment Plan) Report for the benefit that it might have for other organizations.



## CHAPTER VI

### JOHN GILMORE RILEY CENTER/MUSEUM ASSESSMENT PLAN (MAP) REPORT

Submitted by Ann Fortescue, Director of Education and Visitor Services Senator John Heinz History Center, Pittsburgh, Pennsylvania

The John Gilmore Riley Center/Museum is poised to reach significant recognition as a national leader in developing and delivering high-quality African American history programs - exhibitions, publications, and public educational programs. The Riley House Museum has many competing interests for its limited resources - staff and funding - so like nearly every museum in the United States, it is forced to be harshly discriminating in the allocation of the few staff hours and available dollars to do the many activities it deems essential. This institutional assessment aims to identify key areas of focus for success for The Riley Museum and call out recommended action steps to work toward a mission-driven program with sustainable financial footing - one of the hallmarks of success for American museums. The Riley Museum has many enviable accomplishments already under its belt; the next phase of its growth and development should be focused on a transition that takes those accomplishments and turns them into the promotional materials needed to reach the next level of museum excellence - namely branding and financial stability. The Riley Museum is well positioned to accomplish both of these aggressive goals. It has the sound organizational footing upon which to identify its brand and it has an incredibly dedicated and adept Board of Trustees that quickly recognizes the museum's priorities and has the community connections to realize them. The Riley Museum is indeed poised for success. The recommendations contained in the report are based on current standards and best practices in the museum field and field-tested work from the peer reviewer's experience. The Riley Museum identified several key needs in its self-study: a) effectiveness of its organization; b) comparison to peers in the field; c) best alignment of resources to growing demands for services; and d) its ability to respond to changes in the community (better serve its audiences, credibility in the community; financial security). This Institutional Assessment addresses these areas of concern as well as containing a general overview of the Museum's operations.

The site visit provided the essential component of correlating the self-study priorities with those priority areas that did not come to the forefront immediately. This report addresses a combination of those priorities - leadership, support, and visibility. The primary focus of leadership for the Riley Museum is the transition planning from founding and current executive director to next executive director - qualifications that the Board of Trustees has already identified for a museum professional with strong background in history and African American history particularly. The Riley Museum has a very broad base of non-financial support in the form of highly successful partnerships and



collaborations (e.g. Blended Lives school programs; Florida's Black Public High Schools exhibition and publication; Florida Black Heritage Trails Guide). The challenge for The Riley Museum will be to turn this support into financial support and a robust volunteer corps that can extend the reach of the museum into the community. The Museum has established a model for developing and implementing strong and effective collaborations (e.g. Blended Lives; Black Public High Schools; etc.). The next step for the museum is to turn these successful collaborative projects into long-term, stable funding for the museum. For example, included a portion of general operating support funds into project grants; develop projects and requests for funding to include capital improvements; explore endowment funding and challenge grants, such as those from the Kresge Foundation; and conduct national research for foundations and corporations with an interest in supporting the African American community. One of the most successful ways to accomplish this in the museum field is to use a few (two or three) of the most successful projects to establish and launch a brand for the Riley Museum. Using these two or three well-crafted project descriptions in funding proposals, media releases, and other museum communications will establish a clear and consistent message for the Riley Museum. This should reinforce the Riley Museum's identity and its programs. A brand for The Riley Museum will help the Board of Trustees and the Executive Director develop and implement a consistent message and fund-raising plan.

## Leadership/Governance

The museum's current strengths are the Founding Executive Director's ability to realize a vision for the museum, and work within the "establishment" (Florida State Department, Florida Department of Education, Florida State Preservation Office, Leon County Schools, Leon County Administration, etc.) to advance the work of the museum. This project-by-project approach has made many connections for the museum, however these have been episodic in nature – a grant request for a specific project; a publication; request to use adjacent property; etc. – rather than building long-term, deep investment in the museum regardless of the current project or activity. The Board of Trustees is active in and informed about the Riley Museum's projects; they are a Board that works with the Executive Director to implement the work of the museum and provides policy oversight; currently they are not a Board focused on advancing the Riley Museum through networking/branding and fund-raising.

There are two eminent and critical leadership transitions for the Riley Museum. One is the hiring of the next Executive Director and the other is the evolution of the Board of Trustees activities to focus on fund-raising and networking. The next Executive Director needs to embrace and work cooperatively with the Founding Executive Director on retaining the recognition the Riley Museum has earned over the past 12 years. It is important that the Riley Museum not lose its standing as a standard-bearer for Florida's



African American history movement. This is especially true for the Florida Network of African American Historic Sites partners, and the state and local agencies that look to the Riley Museum's Executive Director as a strong, reputable leader: Althemese Barnes has developed the Riley Museum as an established resource for producing high-quality African American history and is the go-to person in Florida and emerging as one nationally.

The change in the Riley Museum's Executive Directorship is an exciting opportunity for the Board, the Museum, and the community. While there will no doubt be concern at Mrs. Barnes' "retirement" as the Riley Museum's full-time Executive Director, it is clear that the Board and Mrs. Barnes will establish an appropriate and effective role for her continued work advancing the Riley Museum. The new Executive Director will need good guidance from and the confidence of the Board of Trustees to be able to carry out his/her duties. It is critical to the Board's success at fund-raising that the momentum of the Riley Museum's proven track-record of high-quality publications and community focused exhibitions, and beneficial partnerships like those with Tallahassee Community Collection and Goodwood Plantation continue uninterrupted in spite of the change in day-to-day leadership of the museum. The Riley Museum's Board of Trustees would benefit by providing the new Executive Director with at least two kinds of community leadership mentors. One that can give good guidance and advice in social and business networking and serve as a "host/hostess" for the new Executive Director to the community. The other can be a resource for decision-making such as an established or retired CEO-level leader with knowledge of the Tallahassee and northern Florida communities who is able to provide context and perspective for the new Executive Director.

*Recommendation:* The Board should strongly consider applying for a Governance Museum Assessment to begin the process of shifting from being involved in the day-to-day operations of the museum to a leadership board more focused on fundraising, networking and strategic planning. Or work with a consultant specializing in non-profit Board development and organizational transitions to work on ensuring uninterrupted leadership, which could include an appropriate and effective role for Althemese Barnes on her retirement to continue working on advancing the Riley Museum.

It will be one of the highest priorities of the Board of Trustees to get the new Executive Director off to the right start and much of that will come from the sound long-range planning the Riley Museum's Board and staff has accomplished. The Riley Museum's strategic long-range plan outlines goals for key areas of activity (collections, programming, financial stability, etc.), however it will be incumbent on the new Executive Director to recommend objectives and performance measures to meet those goals. The Board and Riley Museum staff has established policies and procedures which

provide an excellent foundation for museum operations. The Riley Museum excels and outstrips its peers in having a comprehensive set of operating guidelines in place.





*Recommendation:* The new Executive Director should be responsible for identifying objectives and performance measures (an action plan for each goal) for the Strategic Plan goals.

## **Visibility/Audience**

The next Executive Director and the Board need to work collaboratively to take the museum to the next level. The broad base of support that has been cultivated through project-by-project activities can be used in establishing a brand for the museum. The museum's brand can be the foundation for fund-raising for operating, endowment, and capital dollars. It is important for the Board of Trustees and the Executive Director to identify and agree upon the Riley Museum's brand. The consistent message of a brand will enable all to raise funds and position the museum as a leader for African American history locally, throughout Florida and nationally. The Riley Museum's staff and Advisory Committees will also benefit from having a brand from which to deliver a consistent message and to reinforce mission-based programming and collecting.

*Recommendation:* Establish a BRAND for the Riley Museum

There are many resources available to the Riley Museum Board of Trustees and staff in developing a brand. Because "branding" is such an internally focused activity and at the same time one that needs to resonate instantly with the museum's community, it is strongly recommended that an outside facilitator with experience in this area be contracted. The Executive Director and a committee of the Board will need to identify the scope of work and the measurable outcomes of the branding exercise. One way to solicit qualified facilitators is through a Request for Proposals (RFP). This process allows prospective facilitators to respond to a clearly identified scope of work and expected results, and is an effective way for the Executive Director and Board committee to select recommendations for a contracted facilitator based on credentials and approach. As an AAM institutional member, the Riley Museum may request sample RFP documents from the American Association of Museum's Information Center by emailing [infocenter@aam-us.org](mailto:infocenter@aam-us.org).

*Recommendation:* Use an RFP process to select a qualified facilitator for the branding activity.

Once the RFP is written, the Board of Trustees can help enormously in using their connections to spread the word and identify qualified individuals and firms to respond to the RFP. This may seem like an over-emphasis on branding and the process to develop a brand for the museum, however, if done well, it should be a sound investment toward the overall effort of advancing the museum.

A key part of the branding process for the Riley Museum will be to identify its audiences and what value the Riley Museum brings to their communities. The Riley Museum's current





educational programs are targeted at elementary and middle school students. The museum's exhibitions are aimed at older adults who can reflect on their own experiences in relation to the topic of the exhibition. The Riley Museum's publications also reach this audience of older Floridians as well as local and state agencies that rely on the Riley's research of African American state and local history (e.g. Visit Florida's Black Heritage Trail Guide; State Preservation Office; etc.). The Riley Museum's archives reaches a small group of scholars and writers who use the collections housed at the Tallahassee Community College Library.

*Recommendation:* Use the American Association of Museum's Public Dimension Assessment to identify the Riley Museum's key audiences and how to reach them most effectively.

The Riley Museum has established its reputation for producing high-quality local and state history about the African American experience. Much of this work is unnoticed and/or under-recognized. The Riley Museum should be able to increase recognition and raise awareness with these publications, exhibitions, and educational programs. For example, the Riley Museum's name could be placed prominently on the cover of all books and exhibition catalogues. The Riley Museum can leverage its partnerships to have greater visibility in such partnership projects as the Black Heritage Trail Guide by having the Riley Museum's name and its leadership role in the Florida Network of African American Historical Sites more prominently placed and a significant size advertisement for The Riley Museum in the tourism publication. Recognition for The Riley Museum's outstanding educational program, "Blended Lives," could be gained through a museum education award through the awards programs of the American Association for State and Local History and/or the American Association of Museums Education Committee. The Florida Association of Museums and/or the Southeast Museums Conference should be able to assist The Riley Museum in the nomination process.

*Recommendation:* Increasing awareness for current publications and educational programs through front-page recognition and museum awards.

## Support



The Riley Museum has an outstanding network of non-financial support in the form of partnerships and collaborative projects. The Riley Museum's leadership role in establishing and operating the Network of Florida's African American Historical Sites is award-worthy. This work has enabled The Riley Museum to gain state-wide and national recognition as a leader in the African American history and museum field.

The next phase of support The Riley Museum needs to cultivate is membership, volunteers and significant financial contributions from private sources. A volunteer corps can aid The Riley Museum in extending its reach in carrying out key strategic activities. For example, volunteers can deliver outreach talks about the museum and its programs and services. Or they can assist in completing awards nomination forms.

Building a strong membership program will require some initial research to form a solid foundation upon which to build the benefits of the membership program. It is recommended that The Riley Museum engage the Tallahassee Community College (for its current students, faculty and alumni) as well as a broad base of community organizations that represent the museum's audiences. It will be important for The Riley Museum to identify the benefits of membership and deliver those benefits in order to build a robust membership base of support.

*Recommendation:* Develop a plan to build a volunteer corps based on priority needs for raising community engagement (membership) and awareness (awards, educational programs).

*Recommendation:* Develop a plan to build a membership program and related benefits based on audience needs.

## Collections

The primary collections of The Riley Museum are the archives housed at the Tallahassee Community College Library. The collections are in an excellent environment with appropriate climate controls, security, and a clean work space for processing. Grant funds have enabled the Riley Museum to employ graduate level interns to process the collections. This is an excellent use of available resources directed at important collections care/collections accessibility. The archives are fairly easy to search through file folders and digital records; however, the topic headings in the finding aids could be improved. For example, in the Thelma Hurston collection the correspondence cannot be searched by person or topic, it is arranged chronologically.



*Recommendation:* Review finding aids from other archives to compare with the Riley Museum's with the overall goal of improving access to the collections once they are available on-line.

The Executive Director will need to identify the next priorities and action plans for the archival collections based on the limited resources and strategic direction for the organization. For example, it may be more important for The Riley Museum to use its limited staff resources to focus on branding and raising awareness by making existing publications, educational programs and exhibitions more visible rather than writing a grant for collections processing. Or the archives may play a role in raising awareness for the Riley Museum with attention given to key collections or nationally significant items in the collections.

## **Interpretation**

The Riley House Museum does an excellent job of introducing the visitor to John C. Riley and his accomplishments. The museum also features exhibitions related to topics in African American history. These exhibitions are well researched and presented in an accessible format with many images and conversational text labels aimed at a 6<sup>th</sup>-8<sup>th</sup> grade reading level. It would greatly improve the visitor experience if The Riley Museum could pay more attention to matching The Riley House interpretation with key audiences visiting the historic house and what visitors will learn from their experience.

*Recommendation:* Recruit an intern with an interest in public history, history education, or heritage tourism to research best-practices in historic house interpretation and present a report on best-practices in historic house interpretation that the Riley Museum could consider and work toward implementing. Research should include resources from the National Trust for Historic Preservation, the American Association for State and Local History, and the American Association of Museums; special attention should be given to resources on historic house furnishing plans, the visitor experience in historic houses, and teaching with historic houses.

It is understandable that the Riley House has furniture from the period of the Riley family's occupation, however almost none of the objects from the family survive so the furnishing viewed by visitors are not the ones original to house or family. This is confusing as are some of the contemporary and reproduction decorations. For example, plastic flowers tend to be "dust catchers" and out of place when conveying a particular period in time. Mixing period furniture with a contemporary photograph exhibit inhibits the visitor from focusing on either. These can be easily addressed with short-term steps such as identifying the historic rooms and those used for contemporary exhibitions and making that clear to the visitor.



An historic house-furnishing plan would aid in establishing a focus for interpretation. There may be sample documents available through the AAM Information Center and the director of the Goodwood Plantation might be able to assist in providing criteria used in determining the focus for the rooms at the Plantation. The American Association for State and Local History and the National Trust for Historic Preservation will have additional resources on best practices in developing historic house furnishing plans.

The Riley Museum Executive Director will need to recommend to the Board of Trustees the interpretive focus for the Riley House as part of the interpretive planning process. For example, if interpretation of the house should be completely focused on the life and work of John C. Riley, then an evolutionary plan should be developed to return each of the rooms to its use at a set period in time. On the other hand, it may be more important for the Riley Museum program to have the flexibility of some rooms as period specific while others address topics relevant to the history of the Riley family and the Civil Rights Movement in Florida and the American South. Determining the focus of the Riley historic house will be an important task of the Executive Director and Trustees. This will likely be a related discussion in the branding activity.

*Recommendation:* Use an historic house furnishing plan or other similar interpretive planning activity to identify interpretive priorities for the John C. Riley historic house facility.

The Riley Museum has developed a large number of exhibitions for the size of its operations and the scope of its resources. A number of these exhibitions have traveled to sites in the Florida Network of African American Historical Sites and extended the reach of the exhibition beyond Tallahassee. As part of the interpretive planning, it is strongly recommended that The Riley Museum examine the exhibition development process. Currently, topics are selected based on outside request or curatorial/research interest. This method can be extremely effective in responding to community needs for a particular audience; however the end result may yield an exhibition that lacks broad appeal. Or a final product that reaches one audience segment such as retired African American educators and administrators, but fails at reaching another such as African American high school and college students interested in pursuing careers in education. It is recommended that The Riley Museum establish and practice a more comprehensive exhibition development process that takes into account the audiences, or end users of the exhibitions. This will enable The Riley Museum to document more evidence of meeting community needs on a number of different fronts based on the audiences it serves.

*Recommendation:* Begin creating an exhibition development process that takes into account the collections, facility (various physical spaces for exhibitions – onsite and outreach), and the target audience for each exhibition. This will help focus the exhibition



research, identify available collections, guide exhibition design and security, and shape public programs and publications for the target audience.

## Facilities

The John C. Riley House Museum facilities are in excellent condition. There are fire suppression and security systems in place with the appropriate emergency procedures for activation. The archival collections are housed in a climate controlled Library and Archives facility owned and operated by the Tallahassee Community College. This is one of the many successful partnerships The Riley Museum has set-up to maximize its resources and take advantage of those in the community. The Riley House Museum has appropriate storm protection devices (window shutters) if a heavy storm or hurricane should occur. The grounds are well-maintained and there is ample parking available and easement surrounding the historic house. The Museum has complied with the Americans With Disabilities Act from a mobility standpoint - the ground floor is accessible to those with physical disabilities. Additional work in meeting the needs of visitors with hearing loss and those that are blind or have low vision is included in the strategic plan. The only drawback to the museum physical plant is the lack of food service. This minimizes the attraction of The Riley Museum as a destination. For example, Goodwood Plantation's café makes the site destination even if a visit to the museum buildings was not part of the outing. It is recommended that The Riley Museum explore possibilities of on-site or adjacent food service that could serve in making the museum location a destination attraction and serve a neighborhood need for a luncheon spot.

*Recommendation:* Explore possibilities of on-site or adjacent food service that could serve in making the museum location a destination attraction and provide the neighborhood with options for lunch and other food service. This might be another potential internship project with a student majoring in hospitality, food service, or business enterprise. The focus of the project would be to research existing food service providers (restaurants, cafeterias, caterers, delis, etc.) in the service area of the Riley Museum; identify the potential business capacity (number of people per day, etc.) for food service at the Riley Museum; and what types of food services would be the most likely to succeed (restaurant, cafeterias, caterers, delis, mobile food cart/van). There may be neighboring businesses that could host the food service operation – it need not be located at the Riley Museum, but it could be branded as the Riley Museum's café or restaurant.

## Conclusion

The Riley Museum identified leadership and recognition (awareness and financial support) as two key areas that are critical to the museum's success and sustainability. The museum is at a transition point when the Board of Trustees will need to be involved in





key decision-making that will set the vision for the museum over the next five to 15 years. The ease with which the Board undertakes these leadership decisions will depend on having the information to make good decisions and the expertise around the table to guide them. It is strongly recommended that The Riley Museum apply for a Governance Museum Assessment at this time.

As The Riley Museum plans for the next phase of the museum's growth, it will be able to rely on its on-going successful programs and accomplishments to sustain operations. This should be possible through careful management of existing resources. It is important that The Riley Museum focus on leadership, support and transition planning; this will be a challenge given the museum's practice of program and publication-based work schedules. This should be possible by renewing grant-based support to continue existing successful programs.

The Board of Trustees can be especially helpful during this planning time by sharing their expertise in business planning, financial forecasting, and communications. As much as it is possible to ask a volunteer board to take on, The Riley Museum Board members should be asked to do a bit more during this transition phase – from arranging a media coverage for the museum's latest national and international recognition to preparing a list of prospective donors to approach to fund transition activities such as a marketing consultant to do a Branding workshop with Board and staff or a consultant to conduct a Board Development workshop. The Riley Museum is poised for success, and with Board and staff working collaboratively, the next phase of the museum's growth will be an exciting one.

### **List of recommendations**

- *Recommendation:* Apply for a Governance Museum Assessment from the American Association of Museums
- *Recommendation:* The new Executive Director should be responsible for identifying objectives and performance measures (an action plan for each goal) for the Strategic Plan goals.
- *Recommendation:* Establish a BRAND for the Riley Museum
- *Recommendation:* Use an RFP process to select a qualified facilitator for the branding activity.
- *Recommendation:* Use the American Association of Museum's Public Dimension Assessment to identify the Riley Museum's key audiences and how to reach them most effectively.
- *Recommendation:* Increasing awareness for current publications and educational programs through front-page recognition and museum awards.





- *Recommendation:* Review finding aids from other archives to compare with the Riley Museum's with the overall goal of improving access to the collections once they are available on-line.
- *Recommendation:* Research best practices in historic house interpretation to align the museum's interpretive goals with the visitor's historic house experience.
- *Recommendation:* Use an historic house furnishing plan or other similar interpretive planning activity to identify interpretive priorities for the John C. Riley historic house facility.
- *Recommendation:* Establish an exhibition development process that takes into account the audiences that will be using the Riley Museum's exhibitions.
- *Recommendation:* Explore possibilities of on-site or adjacent food service that could serve in making the museum location a destination attraction as well as serve the neighborhood.
- *Recommendation:* Develop a plan to build a volunteer corps based on priority needs for raising community engagement (membership) and awareness (awards, educational programs).
- *Recommendation:* Develop a plan to build a membership programs and related benefits based on audience needs.

## Resources

- ✓ The Florida Association of Museums provides educational and networking opportunities to museum professionals. <http://www.flamuseums.org/>
- ✓ Southeast Museums Conference provides educational and professional development opportunities and an opportunity for an interchange of ideas and information. It represents 12 southern states. <http://www.semcdirect.net/>
- ✓ The Spring 2007 issue of the National Association of Museum Exhibition's journal *Exhibitionist* was focused on RFPs. Back issues of *The Exhibitionist* can be purchased and you can also download samples of RFPs from the website at <http://name.pmhclients.com/journal/Current%20Issue>.
- ✓ The AAM Information Center has many wonderful resources on volunteering: <http://www.aam-us.org/museumresources/ic/hr/vol/index.cfm>
- ✓ The AAM Information Center has many other wonderful resources as well as sample documents. Visit [www.aam-us.org](http://www.aam-us.org) for the online resources or email [infocenter@aam-us.org](mailto:infocenter@aam-us.org) to request sample documents or other reference services.

## Audience Evaluation and Research

- ✓ AAM Committee on Audience Research & Evaluation: [www.careaam.org](http://www.careaam.org)
- ✓ *Introduction to Museum Evaluation*. Washington DC: American Association of Museums, 1999.



- ✓ Falk, John H., and Lynn D. Dierking, *The Museum Experience*. Whalesback Books, 1992.
- ✓ Korn, Randi, and Laurie Sowd, *Visitor Surveys: A User's Manual*. American Association of Museums, 1990.

### **Exhibitions**

- ✓ Serrell, Beverly, *Exhibit Labels: An Interpretive Approach*, AltaMira Press, American Association of Museums.

### **Fund Raising**

- ✓ Panas, Jerold, *Fundraising Habits of Supremely Successful Boards: The A 59-Minute Guide to Assuring Your Organization's Future*, 2006.
- ✓ Schaff, Terry and Doug, *Fundraising Planner (The): A Working Model for Raising the Dollars You Need*, 1999.
- ✓ Martin, Patricia, *Made Possible By: Succeeding With Sponsorship*, 2004.

### **Governance**

- ✓ Richard T. Ingram, *Ten Basic Responsibilities of Nonprofit Boards* (National Center for Nonprofit Boards, now known as Board Source. Board Member Manual, Aspen Publishers, Inc.
- ✓ *Secrets of Successful Boards*, compiled and edited by Carol Weisman, published by F.E. Robbins & Sons Press, St. Louis, Missouri.
- ✓ Board Source -[www.boardsource.org](http://www.boardsource.org)
- ✓ <http://www.boardsource.org/Knowledge.asp?ID=3.196>
- ✓ <http://www.boardsource.org/Knowledge.asp?ID=3.368>

Board Source increases the effectiveness of nonprofit organizations by strengthening boards of directors through our highly acclaimed consulting practice, publications, tools, and membership program.

- ✓ Board Café -<http://www.compasspoint.org/boardcafe>

One of the most read and followed newsletters for nonprofit boards, written by Jan Masaoka with contributions from some of the top experts in the field. Trustee Training for Museums and Historical Societies is a workbook developed by Education & Training Associates. This 150-page workbook has exercises for boards and staff to learn about governing roles, responsibilities, accountability, and liability. It also contains tools for planning projects, managing time and people, and evaluating the effectiveness of the board. The materials are made possible through the collaboration of the New York State Education Department Office of Cultural Education's Museum Chartering program, the New York State Council on the Arts, and the Museum Association of New York

- ✓ <http://www.manyonline.org/TrusteeTraining.htm>
- ✓ A useful article about ways the Board can support a new executive director: <http://www.compasspoint.org/boardcafe/details.php?id=37>



## Interpretation

- ✓ James Carter, ed., *A Sense of Place: An Interpretive Planning Handbook* (Inverness, Scotland: Tourism and Environment Initiative, 1997), available at <http://www.scotinterpnet.org.uk/pages/resources>
- ✓ [http://www.4culture.org/heritage/publications/T27\(a\)Interp Exhibit Strategies.doc](http://www.4culture.org/heritage/publications/T27(a)Interp%20Exhibit%20Strategies.doc)
- ✓ Interpretive Plan for the Annapolis Maritime Museum. <http://www.annapolismaritimemuseum.org/interpretation-plan.pdf>

## Marketing and Branding

- ✓ Beckwith, Sandra L., *Publicity for Nonprofits: Generating Media Exposure That Leads to Awareness, Growth, and Contributions*, 2006.
- ✓ Kotler, Neil and Philip Kotler, *Museum Strategy and Marketing: Designing Missions, Building Audiences, Generating Revenue and Resources*, 1998.
- ✓ McLean, Fiona, *Marketing the Museum*. Routledge, 1997.
- ✓ The Association of Science-Technology Centers (ASTC) has an article that discusses 6 common myths about brand and the truths behind them <http://www.astc.org/pubs/dimensions/2002/may-jun/branding.htm>
- ✓ Charity Village states that branding is about making sure the community sees the passion and core values that lie at the heart of an organization. The tangible components (such as name, logo, and tagline) should be a reflection of these intangibles: <http://www.charityvillage.com/cv/archive/acov/acovo2/acovo245.html>
- ✓ Museum Marketing Web site, <http://www.museummarketingtips.com/>
- ✓ <http://www.museummarketingtips.com/articles/hwy.html>
- ✓ <http://www.museummarketingtips.com/articles/listen.html>
- ✓ <http://www.museummarketingtips.com/articles/recruit.html>
- ✓ <http://www.museummarketingtips.com/articles/turn.html>
- ✓ Generic Marketing Plan—it asks lots of great questions.
- ✓ <http://www.fullcirc.com/rlc/rlcindex.htm>

## Membership

- ✓ “29 Ways to Get and Keep More Members,” Dana Hines found on Web site, Museum Marketing Tips, [www.museummarketingtips.com](http://www.museummarketingtips.com)
- ✓ “An Evaluation Tool for Membership Programs” Fact Sheet from AAM Information Center, [www.aam-us.org](http://www.aam-us.org)

## Mission

Gail Anderson, editor, *Museum Mission Statements: Building a Distinct Identity*, Technical Information Series, Washington, DC: American Association of Museum, 1998.

AAM, The Museum Mission Statement: <http://www.aam-us.org/getinvolved/ipam/Museum-Mission-Statement.cfm>

## Museum Standards

Elizabeth E. Merritt, commentator. *National Standards & Best Practices for U.S. Museums*. American Association of Museums, 2008.



## CHAPTER VII

### The Process – Methods, Tools and Strategies

Based on credible research of succession and transition models the Executives, the Board and the Founding Director developed Core Competencies Rubric and Weighing tools, and leadership development assessment and evaluation methods during the process. These are provided, with descriptors, for the use of other organizations that might be seeking to embark upon succession, transition, alliance or restructuring.

- (1) Core leadership competencies (skills, abilities, knowledge, personality, role and responsibilities) deemed as necessary and required for an individual to perform in a manner that would maintain and move an organization to the next level. Included are: Leadership Promise, Support of Museum Values, Interpersonal Skills, Demonstrated Results and Self-Development (See Attachment 1). These are designed to be applicable with any new leadership strategy as a base-line model.
- (2) An Employment Agreement including job duties and responsibilities identifying the gap between leadership competency requirements and the candidate's weighted scoring of performance and preparedness using a Core Competencies Rubric and Weighting tool. It was decided that a successful candidate should be groomed, developed and after six (6) independent rating periods (each covering a six-month performance period) attain a total weighted score of 85% or more. (See Attachments 2 and 3)
- (3) Once a JGRCM Executive Director candidate was selected, the Founding Director agreed to provide volunteer mentoring and consulting, as called upon by the new leadership, to transfer historical and institutional knowledge of the organization, its operations and programs.
- (4) An Employee Performance Evaluation tool (see Attachment 4) was designed to provide constructive feedback and conduct core competency ratings based on the skills, knowledges and abilities vs. outcome performances achieved. (See Attachment 5).
- (5) The Board and Founding Director were involved in the review of all processes that led to the transition to new leadership. The Board agreed to remain in place to adapt for any occurrences that might arise within the organization of adverse impact to the goal and intent and to continue as ambassadors and an identifiable, visible, and active support source for the organization.



- (6) The JGRCM Board of Directors, after thorough review, legal consultation and assistance, adopted the organizational structure presented by the City of Tallahassee and were very much involved in the personnel assessment and selection process. This included selected personal interview questions posed to applicants. (See Attachment 6 - JGRCM Succession Plan – Selected Candidate Interview Questions).

In conclusion, the process worked and valuable strategies and tools were developed. Moreover, utilizing the MAP planning strategies, the Board of Directors succeeded in:

- ❖ Strengthening its collaboration with the City of Tallahassee;
- ❖ Articulating successfully the value of the legacy and what would be lost should the museum doors close; and
- ❖ Sharing collaboratively the strengths of its role in the community as a major historical and cultural resource.

From the only historic African American house in the downtown area, to first African American National Register Listed property, only home of a former enslaved person born in Tallahassee still standing at its original location, key subject matter expert on city and county heritage trail projects and model projects to its credit within the Council on Culture and the Arts and the Tourist Development Council and VISIT Tallahassee, and its ability to bring diversity and inclusion to ALL of these endeavors, and more, made the decision to restructure the most feasible, accountable and forthright path to sustainability for the John Gilmore Riley Center/Museum, a process that was consummated on September 28, 2020.



## Leadership Succession Planning Tools

(Attachment 1)

John G. Riley Center/Museum

Proposed Succession/Transitional Plan Core Competencies

Rubric and Weighting

Museum Leadership Core Competencies	Recommended Weighting
<b>Leadership Promise</b> <ul style="list-style-type: none"> <li>▪ Is Motivated to Lead</li> <li>▪ Accepts Leadership Responsibility</li> <li>▪ Mobilizes Resources/People to Action</li> <li>▪ Develops and Leads Teams that have High Morale</li> <li>▪ Is A Good Business Manager</li> </ul>	25%
<b>Support of Museum Values</b> <ul style="list-style-type: none"> <li>▪ Behaves Consistently with Museum Values</li> <li>▪ Displays Respect for Others</li> <li>▪ Is a Good Team Player</li> <li>▪ Identifies with Museum Board and Leadership</li> </ul>	22%
<b>Interpersonal Skills</b> <ul style="list-style-type: none"> <li>▪ Communicates Clearly and Effectively</li> <li>▪ Makes Effective Presentations</li> <li>▪ Demonstrates Diplomacy</li> <li>▪ Is Trusted and Respected</li> </ul>	20%
<b>Demonstrates Results</b> <ul style="list-style-type: none"> <li>▪ Shows Positive Team Results</li> <li>▪ Displays Objective Indicators of Success</li> <li>▪ Accomplishes Major Assignments</li> <li>▪ Is Results Oriented</li> <li>▪ Displays Good Time Management Skills</li> </ul>	18%
<b>Self-Development</b> <ul style="list-style-type: none"> <li>▪ Has Accurate Self-Insight</li> <li>▪ Is Coachable; Accepts Feedback</li> <li>▪ Has History of Learning from Experience</li> <li>▪ Quickly Learns New Tasks</li> <li>▪ Is Self-Motivated and Initiates Development Activities</li> <li>▪ Demonstrates Aptitude for Sound Planning and Organizing</li> </ul>	15%
<b>Total Weighting</b>	<b>100%</b>





(Attachment 2)  
Employment Agreement

This agreement is made between John G. Riley Center/Museum for African American History and Culture Inc., a Florida not-for-profit corporation (“Employer”) and XXXXXXX (“Employee”) in consideration of the mutual covenants described below. The Employer and Employee agree as follows:

Employee will be responsible for implementing the overall vision, purpose and mission of the organization as follows:

- Provide leadership through specialized disciplines of the museum in accordance with accepted museum industry standards and professional practices, following a specified work plan.
- Work in collaboration with the Board of Directors and the other staff to develop policies and procedures and assure adherence by staff, volunteers and visitors.
- Help to assure execution of duties by staff as well as supervise and coordinate actions by staff.
- Provide prudent financial management of resources and exercise good stewardship.
- Assist other staff with fundraising as part of the board’s long-range strategic plan
- Foster positive relationships with partners and expand technical resources and portfolio of professional development opportunities available to the Riley House organization.
- Become knowledgeable of Riley collections and archive and assists other staff with care and management as necessary

Hours of Employment: Core hours are Monday-Friday from 10:00 am to 4:00 p.m. and other hours as necessary to fulfill the duties and expectations of the position. Due to the nature of the organization and its programs it might be necessary to occasionally vary hours to produce the desired product and service. Hours shall be at Employer’s Office in Tallahassee, Florida or at such other place as necessary and agreed upon.



1. Term. The term of this Agreement is xxxxxxxxx to renewal upon satisfactory performance, and subject to earlier termination in accordance with Section 5. The  
  
term will continue for the agreed upon period unless either party gives the other party written notice, at least five working days prior to the termination of employment.
2. Compensation. A monthly contract fee of xxxxxxxx will be paid to occur on the last working day of each month for services rendered. An evaluation shall occur annually to determine the feasibility and capability of continuing the employment agreement. No other compensation shall be provided for this position under this agreement.
3. Termination. Employment shall terminate automatically and without further action upon Employee's death. Employer may terminate Employee, without cause, by giving five days prior written notice. Employer may terminate Employee's employment immediately upon giving written notice, for cause, if (a) Employee is convicted of a criminal offense; (b) Employee engages in fraudulent conduct or is negligent in the performance of his or her duties; (c) there is any other just cause for termination of Employee's employment. If terminated, either without cause or for cause, Employer shall be under no obligation except to pay such salary as Employee is entitled to receive up to the effective date of the termination.
4. Miscellaneous. This agreement shall be governed in all respects by the laws of the State of Florida. The agreement is not assignable by Employee. A modification of this Agreement is effective only if it is in writing and executed by both parties.

Signed: \_\_\_\_\_(Employee) \_\_\_\_\_(Employer)

Date: \_\_\_\_\_ Date: \_\_\_\_\_



### (Attachment 3)

#### Executive Director-Duties and Responsibilities

Responsibility: To carry out the executive and administrative functions of the organization. The Executive Director reports to the Board of Directors and has primary responsibility and authority for the organization's consistent achievement of its mission. The Executive Director is also responsible for the following:

- providing leadership and vision;
- administering day-to-day operations;
- training and managing staff and interns;
- guiding and monitoring staff and resource development;
- budget planning and financial management;
- fundraising via grants and corporate sponsorships
- collaboration with other arts and cultural organizations; and
- community outreach and general oversight of programs



(Attachment 4)

**John G. Riley Center/Museum**  
Employee Performance Evaluation

\_\_\_\_\_  
(Date)

Employee Name: \_\_\_\_\_ Position Title: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Type of Review:    Annual \_\_\_\_\_    Probationary \_\_\_\_\_    Other \_\_\_\_\_

The John G. Riley Center/Museum recognizes and considers the Employee Performance Evaluation process as on-going and essential to providing constructive feedback with respect to skills, behavior and providing a framework for employee development. To this end and objective, the following assessment of your work performance compared to expectations is provided utilizing the following rating scale of assessment:

- 1    Unacceptable (Fails to meet work performance expectations)
- 2    Needs Improvement (Frequently fails to meet work performance expectations)
- 3    Satisfactory (Generally meets work performance expectations)
- 4    Outstanding (Frequently exceeds work performance expectations)
- 5    Excellent (Consistently exceeds work performance expectations)
- NA   Evaluation measure not applicable to job duties

General Performance Requirements	Key Job Duties	Performance Rating						Other Comments
		1	2	3	4	5	NA	
Job Skills and Knowledge	Has practical, technical and professional skills required for the job							
	Has sufficient historical preservation operations							



	knowledge and experience to make informed decisions within the scope of responsibility							
	Keeps up to date with best practices and new developments							
	Ensures hiring and training procedures are followed							
General Performance Requirements	Key Job Duties	Performance Rating						Other Comments
		1	2	3	4	5	NA	
Job Skills and Knowledge (Continued)	Ensures that historical preservation, security and safety practices and procedures are followed							
Customer Service	Takes initiative to inquire about customer and stakeholder needs and opinions							
	Interacts with museum audiences frequently including attending functions and events							
	Encourages and develops customer service skills with museum employees							
	Actively involved in John G. Riley Center/Museum fund development							



	Effectively handles and responds to customer complaints and concerns						
<b>Teamwork</b>	Is an effective John G. Riley Center/Museum team member						
	Sets a positive example for the museum team						
	Motivates others; creates enthusiasm for team effort						
	Sets a model for teamwork that encourages common goals						
	Is an effective team builder promoting strong working relationships						
	Periodically initiates, assists and plans activities to develop museum teamwork and pride						
<b>Communications</b>	Presents ideas and information in a concise, well organized way						
	Listens; concentrates on information presented; takes action						
	Informs supervisor, employees in a timely manner						
	Participates actively in meetings; makes meaningful contributions						





	Holds well organized and effective meetings							
<b>Planning and Organization</b>	Manages time effectively							
<b>General Performance Requirements</b>	<b>Key Job Duties</b>	<b>Performance Rating</b>						<b>Other Comments</b>
		1	2	3	4	5	NA	
<b>Planning and Organization</b>	Sets precise, measurable goals that are realistic, challenging and compatible with John G. Riley Center/Museum's goals							
	Anticipates problems and plans accordingly; acts versus reacts							
	Able to prioritize work. Sets realistic deadlines for self and others and ensures deadlines are met.							
	Delegates responsibility appropriately							
<b>Problem Solving</b>	Observes early signs of changing conditions							
	Offers creative and effective solutions							
	Utilizes all available and appropriate resources, including employees							



	Follows up to ensure that appropriate actions have been taken						
	Open to new ideas, allows and supports employees to make decisions						
<b>Entrepreneurial Skills</b>	Manages affairs of the John G. Riley Museum as if it were her/his own business						
	Works independently; does not wait to be told what to do						
	Is progressive in outlook; initiates new approaches and ideas						
	Makes good decisions; can think on feet						
	Avoids getting caught in work that shortchanges personal contact						
<b>Leadership and Management</b>	Takes charge of museum people/events; assumes leadership in a positive way						
	Ask for and is responsive to feedback on own management style						
	Identifies and resolves conflict/dissatisfaction issues						
	Treats all museum employees with fairness and respect						



General Performance Requirements	Key Job Duties	Performance Rating						Other Comments
		1	2	3	4	5	NA	
<b>Leadership and Management (Continued)</b>	Meets customer satisfaction and employee turnover goals							
	Assists museum board members in problem resolution at the administrative level in a manner that avoids unnecessary board actions							
	Assist the museum board in establishing policy while acknowledging the ultimate authority of the board							
	Responds to requests for information or assistance by museum board members							
	Initiates informing the board of current issues and administrative developments in a timely manner							
	Assists implementation of museum board actions in accordance with their intent							
<b>Training and Development</b>	Takes responsibility for her/his own training and development							
	Follows up and integrates training received							



	Ensures new employees are fully trained on all aspects of the job						
	Provides clear, objective and timely feedback to employees						
	Identifies promotable employees and provides necessary training						
<b>Budget Administration</b>	Ability to develop, manage and critique budget						
	Utilizes forecasting in planning, staffing and cost control						
	Assists in increasing income and revenues						
	Identifies and recommends cost reduction measures without detracting from museum services, operational or quality level						
	Observes early signs of changing conditions; responds effectively						

	Performance Rating						
	1	2	3	4	5	NA	
Overall Performance Evaluation Rating							
Performance Summary Comments							
Employee Comments	Concur		Does Not Concur				

Employee Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Supervisor Signature: \_\_\_\_\_ Date: \_\_\_\_\_



(Attachment 5)

**John G. Riley Center/Museum  
Succession Plan Core Competencies  
Rubric Semi-Annual Ratings**

Museum Leadership Core Competencies	Six Months Assessment Ratings												Weighting
	1 <sup>st</sup>		2 <sup>nd</sup>		3 <sup>rd</sup>		4 <sup>th</sup>		5 <sup>th</sup>				
	(Dates)		(Dates)		(Dates)		(Dates)		(Dates)		(Dates)		
Leadership Promise	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	25%  (Yes = 5 Points)
▪ Is Motivated to Lead													
▪ Accepts Leadership Responsibility													
▪ Mobilizes Resources/People to Action													
▪ Develops and Leads Teams that have High Morale													
▪ Is A Good Business Manager													
Support of Museum Values	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	22%  (Yes = 5.5 Points)
▪ Behaves Consistently with Museum Values													
▪ Displays Respect for Others													
▪ Is a Good Team Player													
▪ Identifies with Museum Board and Leadership													
	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	





<b>Interpersonal Skills</b> <ul style="list-style-type: none"> <li>Communicates Clearly and Effectively</li> <li>Makes Effective Presentations</li> <li>Demonstrates Diplomacy</li> <li>Is Trusted and Respected</li> </ul>													<b>20%</b>  (Yes = 5 Points)
<b>Demonstrates Results</b> <ul style="list-style-type: none"> <li>Shows Positive Team Results</li> <li>Displays Objective Indicators of Success</li> <li>Accomplishes Major Assignments</li> <li>Is Results Oriented</li> <li>Displays Good Time Management Skills</li> </ul>	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	<b>18%</b>  (Yes = 3.6 Points)
<b>Self-Development</b> <ul style="list-style-type: none"> <li>Has Accurate Self-Insight</li> <li>Is Coachable; Accepts Feedback</li> <li>Has History of Learning from Experience</li> <li>Quickly Learns New Tasks</li> <li>Is Self-Motivated and Initiates Development Activities</li> <li>Demonstrates Aptitude for Sound Planning and Organizing</li> </ul>	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	<b>15%</b>  (Yes = 2.5 Points)



<b>Total Rating</b>							<b>100%</b>
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**(Attachment 6)**

**Candidate Personal Assessment and Interview  
(6-month plan)**

1. Identify the specific qualification that makes your most qualified and prepared for the Executive Director position.
2. What was your motivation to take on the “top job”?
3. Do you feel that the Riley Museum Core Competencies Development Plan will provides you with the requisite understanding and knowledge of what to expect as the Executive Director?
4. Describe the following experience(s) that you feel will best prepare you to be a success in the position: mentoring, coaching, shadowing and/or training.
5. What is your vision for the Riley Museum?
6. Was the training and knowledge of the organization that was shared during recruitment, and subsequent to hire, been of benefit? Did your preparation period, training and engagement, meet your expectations?
7. What are your plans for maintaining the Riley Museum staff, community, and global supports/resources and taking the museum to the next level?
8. What have you liked most about your preparation and employment period to date?
9. What do you like least about your preparation and employment period to date?
10. How would you summarize your Riley Museum Executive Director experience and is there additional feedback that you would like to share?




## Chapter VIII

### Planning, Mentoring, Coaching, Training Tips and Tools

Planning for new leadership is designed to ensure an organization's ongoing stability, transfer of knowledge and skills, nurturing and focus on the mission, program and overall good health of the operation while assuring a smooth transition. With the exception of unforeseen emergencies, this process should be a proactive action and directed toward functions of the organization's key officials. Again, and it cannot be stressed enough, is that the total organization should be involved including the Board, stakeholders, incumbent Executive Director and/or key transitioning officials and pertinent staff.

Planning for new leadership compels the organization to look strategically at its future and develop action steps for a successful transition. The following checklist is provided as a tool that can be used to posture an organization for sound risk management practices and a well-planned transition process:

	<b>Succession Planning Tips</b>
	1. Determine incumbent's readiness for organizational leadership change and willingness to embrace a new professional identity once a succession plan has been completed.
	2. Form a Succession Planning Committee under direction of the Board of Directors. Begin the leadership succession planning process early and allow a minimum 18 – 24 months for completion.
	3. Develop a broad based pool of candidates, inclusive of independents, internal promotions as well as referrals from respected sources within the organization, stakeholders and the community.
	4. Review and update the organization's strategic plan to reflect the current mission, goals, and priorities. Ensure that the Board of Directors is fully engaged and has an understanding of the operational components of the organization prior to the implementation of the succession plan.
	5. Review, update and ensure the accuracy of the successor's role and expectations by encouraging constant communication between the Board of Directors and the successor regarding the desired skill-set, experience, management ability and core competencies.
	6. Clearly define the new role(s) to be undertaken by the incumbent to ensure that the founder's syndrome does not create organizational stagnation.
	7. Evaluate potential candidates' innate leadership promise and abilities in addition to their potential to be nurtured, developed and trained.



✓	Succession Planning Tips
	8. Include as a part of the interview process the organization's established and defined goals, benchmarks and timeline for meeting expectations.
	9. Conduct a thorough employment background screening to include references checks and other due diligence.
	10. Evaluate and measure the leading candidate's leadership core competencies level and the established acceptance level for selection on a periodic basis to establish and assess the rate of progress.
	11. Develop a training and development curriculum in addition to coaching, mentoring and shadowing experiences in alignment with candidate needs and organizational objectives.
	12. Conduct consistent (quarterly, bi-annual, annual) performance evaluations and 360-degree evaluation of executive staff based on stated goals that have been articulated in-writing within the first 90-days of hire.
	13. Be on alert early in the process for incompatible relations between the Board of Directors, the trainer, other staff or stakeholders and take action to resolve personal friction as quickly as possible.
	14. Do not hesitate to begin the process over should it be determined that the selected candidate does not meet the expectations of the position.
	15. Obtain evaluative feedback about the organization's succession planning process, including that of the candidate, to assess strengths, weaknesses and opportunities to improve the process.

This checklist of action steps can proactively guide an organization through an effective and well-planned leadership succession planning process. The intended outcome is to identify, groom and select an appropriate candidate for leadership that is capable and prepared to lead the organization toward pursuit and attainment of its strategic objectives while supporting and embracing its values.



## CONCLUSION

### PLANNING, MENTORING, COACHING, TRAINING FOR NEW LEADERSHIP

As many Founders and Executive Directors of African American Museum of the baby boomers generation begin to contemplate retiring, the need for replacements that are committed, qualified and dedicated to the mission and purpose intensifies. Their efforts grew out of personal sacrifices concerned that history was being written, preserved and presented in a colorless fashion. It was a time when the Jim Crow era prevailed and the struggle for Civil Rights to overcome segregation legal and practiced made any pursuit difficult to almost impossible. Improvements have been made, however there are remaining vestiges that consciously or unconsciously have a bearing on the path of survival for these museums. In addition, 21<sup>st</sup> century museum leaders need new global and technological knowledge, skills and abilities and applicants demand salaries beyond the capability of many of these museums to accommodate. Yet, it is inevitable that to preserve the legacy, change, by whatever method, is critical to survival.

There are academic studies that define “best practices” to training, mentoring, coaching and obtaining new leaders. These studies however should be evaluated for effectiveness to meet the needs of smaller, lesser endowed, organizations. Some approaches, pursued by lesser endowed museums, might pale in the face of academics, and even considered “unorthodox. Yet, they may prove to be the clearest path forward. This is not to be interpreted as a dismissing of the referenced studies as they too have value, in the right setting. Some museums with years of operation under their belt, and an umbrella that provides for full financial, administrative and infrastructure support, are better positioned to adhere to some of the more academic “best practices” that include: underwriting ongoing leadership classes and courses for current employees as an upward mobility strategy, offering very attractive salaries and creating and managing internal competitive processes toward the acquisition of new leaders. Excerpts from some of these studies are shared for their usability as tools to consider as well.

The most studied, articulated and practiced method by the afore-referenced “academic” companies given their experience in leadership replacement has been through the process of succession, transition, alliance creating, bench elevation or restructuring. The majority studies stress also the development of a clearly defined Strategic Plan as an important first step, stating the need, the desired goal, definitive steps to achieve goals and objectives and a timeline.



To discover and share what some practitioners of Succession Planning have learned, a review was made of a study that 16 firms sponsored as an investigation into successful tools and strategies with the American Productivity and Quality Center. These firms were identified by published reports or nominated by the study team as potential “best practice partners”. Included were: Dell Computer, Dow Chemical Company, Eli Lilly and Company, Pan Canadian Petroleum, and Sonoco Global Products. The study was based on visits and review of the approaches to management succession of the firms.<sup>1</sup> Key Succession Planning feedback “best practices” obtained from this study are shared for the benefit of “Baby Boomers”/Founders-Executive Directors - other senior leaders - and Boards of Directors as follows:

- Best-practice organizations make succession planning an integral corporate process by exhibiting a link between succession planning and overall business strategy. This link gives succession planning the opportunity to affect the corporation’s long-term goals and objectives.
- The tools and processes associated with successful succession planning are coupled with the “general deliverables” to produce a comprehensive process.
- Best-practice organizations use a core set of leadership and succession management competencies.
- Best-practice organizations emphasize the importance of specific, individualized development plans for each employee.
- Individual development plans identify which developmental activities are needed.
- Best-practice partners rely on the fundamental developmental activities of coaching, training, and mentoring.
- In addition to traditional executive education programs, best-practice partners increasingly use special assignments, action learning, and web-based development activities.
- Best-practice organizations develop methods of assessment to monitor the succession planning process.<sup>2</sup>

Following the investigation, the American Productivity and Quality Center sought recommendations for success from the participating companies. Insights for success that these participant companies provided in response included the following:

1. Keep the process simple. Most refinements to succession management systems involved making the process more logical and simple so that busy executives would not feel that the bureaucracy was burdensome.

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<sup>1</sup> Dr. Robert M. Fulmer, “Choose Tomorrow’s Leaders Today, Succession Planning Grooms Firms for Success”, Graziadio Business Review, Volume 5 Issue 1, 2002

<sup>2</sup> Ibid.





2. Engage technology to support the process. Information technology makes it possible for managers throughout the world to monitor and update developmental needs and activities on a timely basis. Making information timely and reducing the time required to manage the system are major contributions of technology.
3. Align succession management within the organization's overall business strategy.
4. Secure senior level engagement in the process. None of the best practice firms would have been as successful without top management endorsement and involvement.<sup>3</sup>

A sampling of museum directors in the Florida African American Heritage Preservation Network was contacted to share information for this Guide. Most expressed the realization that preparing for new leadership is vitally important for the future of their organizations. Most have not taken definitive steps to develop a strategic plan to move forward. The reasons range from a lack of resources, need for subject matter experts to help with the drafting and crafting of approaches, including customized, to meet the need - and TIME. Having employees on hand prepared and ready to fill the new leadership role is ideal. Boards benefit from such and this decreases the organization's risk with respect to future continuity and performance. However, many of the Executive Directors contacted find this approach very difficult given that many constitute the full staff and at best have one to two other personnel, mostly part-time. For the most part leadership development is on the back burner as a majority of their TIME, of necessity, is directed to the day-to-day managing and operation of their museums.

The hope is that this Guide will start the thinking and begin the steps toward training, coaching and mentoring as part of retaining the legacy. The preserving of history that includes color, and is now being told primarily through the work of the African American museums, is very important. To educate present and future generations to this history requires planning and preparing intentionally to "pass the legacy baton".

In addition to compartments, actions and implementation strategies of success shared through profiles of the Florida African American Heritage Preservation Network (FAAHPN) and the John Gilmore Riley Center/Museum, the Guide concludes with some baseline recommendations, as an incentive and encouragement.

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<sup>3</sup> Ibid.



### Create a Succession Team:

#1: Organize a Succession, Transition, Management, Talent, or Workforce Managing Team. Identify and assign tasks and responsibility to access, evaluate and develop the most feasible Plan of Action to train, mentor, and coach and prepare for new leadership. Engage partners who are experienced with the process and those that have shown genuine support for your organization's mission and purpose and retention of the legacy.

#2: Engage –invest in professional leadership transition training for the Team.

#3: Define the key position that is imperative to begin planning to replace, outlining the duties as well as those of the support staff for this position.

#4: Create an organizational replacement strategy – Strategic Plan. One that is bold, flexible and consider all options based on the status of the organization, its partners, long-term benefactors and individuals and institutions with resources to impact the goal, objectives and ultimate outcome.

#5: Evaluate Bench Strength - Current staff, consistent long serving volunteers, recent retirees with enough years to devote to leadership of the organization for a defined future period of time from 10-15 years.

#6: Define the key positions that will be necessary to retain, or release, as part of the process to maintain capacity.

#7: Communicate: Share in earnest the need, opportunities and volatility absent a solution. Do this with sincere individuals who have influence, decision-making roles in the community, institutions that value/appreciate and recognize the asset of the organization and have a desire to retain the legacy.

The mission and purpose of this Guide is to acknowledge, appreciate and help preserve the hard work, dedication, commitment of individuals who “closed the gap” so that history is told in color – a work that is still very much needed.



# APPENDICES

- I. Member Anecdotes
  - A. Lincolnville Museum and Cultural Center
  - B. Mary S. Harrell Black Heritage Museum
  - C. Spady Cultural Heritage Museum
  - D. African American Museum of the Arts
  - E. Pinellas County African American Heritage Museum
  - F. Contributors
    - Pasha Baker, Goldsboro African American Museum of History and Culture
    - Wilma K. McKay, McKay Management Consulting, LLC
- II. Credits
- III. FAAHPN Map
- IV. FAAHPN of Museums and Cultural Centers



Lincolnville  
Museum and  
Cultural Center



102 Martin Luther King Ave.  
St. Augustine, FL 32084

904.824.1191  
lmccstaug@gmail.com  
lincolnvillemuseum.org

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#### FAAPHN Trust Packet Review

I think the procedural manual is helpful to museums like the Lincolnville Museum and Cultural Center. I think many small museums could benefit from having a guidepost to follow for creating and updating documents like by-laws, strategic plans, succession planning and job evaluations. The assessment for FAAPHN and John Riley House Museum was also helpful for reviewing our own collections, archival and interpretation of Lincolnville history. New and young museum boards often operate by trial and error which can be costly and time consuming.

We just completed a by-laws revision and I wish we had had the section available for our board members prior to starting the revision. We had to use an array of sources to find prototypes of some of the items included such as board member expectation and responsibilities. We will be updating our strategic plan soon and will consult this manual for guidance. Sharing this information throughout the FAAPHN network should prove to be a very valuable tool.

FAAPHN has been very beneficial to the LMCC's developmental success. It was through FAAPHN workshops and field studies that we became acquainted with the IMLS and many other support organizations for capacity building. The support for interns has also helped us to meet many of our objectives and to provide operation and research help for exhibits and museum tours. In the past four years the LMCC has transitioned from an all-volunteer operation to one with four professional staffers and a succession plan for the executive director.

Regina Gayle Phillips  
Executive Director



# Mary S. Harrell Black Heritage Museum

*Funded and operated by the Black Heritage Festival, Inc.*



*Mary S. Harrell*  
Black Heritage Museum

314 N. Duss Street  
New Smyrna Beach, FL 32168  
386.478.1934  
[blackheritagemuseum@gmail.com](mailto:blackheritagemuseum@gmail.com)

A grassroots activist, Mary S. Harrell, founder of the Black Heritage Museum, along with a group of devoted community supporters, recognized the need to collect, preserve, study and share the history of African Americans. Mary was inspired by Mrs. Altamease Barnes, and saw her as a shining example of what could be accomplished through perseverance. Mary worked diligently to amass an impressive collection of local history (Southeast Volusia) within the walls of the Black Heritage Museum which opened in 1999. After retiring from the Volusia County, Florida, schools, Mary dedicated her life to educating young people about African American history and promoting the museum as a cultural gem. In her memory, the museum was named the Mary S. Harrell Black Heritage Museum. Her husband, Jimmy Harrell, Director, is continuing her legacy and providing quality programs that Mary would be proud of.

In the Guide, Preserving the Legacy, Mrs. Barnes continues to inspire and educate. What a valuable tool! A very practical guide! This document is well-written and will be used for many years by museum professionals, college professors, historians, preservationists, and anyone seeking a deeper understanding of what it takes to be successful in the day-to-day managing and operation of a museum (with very real-life examples). Equally important, who will carry the torch to preserve the legacy in the preservation of the African American History? The need to train, mentor, coach and prepare the younger generation to preserve the legacy is clearly outlined in this document. Mrs. Altamease Barnes, has created an urgency for me to do something about recruiting, mentoring and coaching the young historians or museum lovers and Interns who have shown interest in the field. I admire her exceptional intellectual ability to present information in such a powerful manner. Her leadership in John G. Riley Center/museum and FAAHPN - two very successful endeavors - is a testimony to her incredible ability to lead and forge ahead amid the challenges of the times.

Even though we have a succession team, with an aging staff "baby boomers", this guide is a wake-up call to get serious about succession planning. College interns, supported by state appropriations, are vital to the daily operation and management of the museum. They come with social media and technical knowledge/skills that are essential in supporting our mission. In our effort to attract more young people and continue the legacy of the founder, two scholarships are awarded annually to local high school graduating seniors who meet the museum's criteria. Partnerships and an anonymous donor help to make the scholarship awards possible. The well documented example of a grassroots movement to preserve the African American history in and around Tallahassee has inspired grassroots activism amongst 30+ African American museum professionals around the State.

Yes, "a rising tide lifts all boats."



Ann W. Harrell  
Board Chair  
MARY S HARRELL BLACK HERITAGE MUSEUM  
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386-295-0676  
aharrell595@aol.com





EXPANDING, PRESERVING AND  
PRESENTING THE CULTURALLY  
DIVERSE HISTORY BLACK  
PEOPLE IN PALM BEACH  
COUNTY.

**Expanding and Preserving  
Our Cultural Heritage, Inc.  
170 NW 5<sup>th</sup> Avenue**

**Delray Beach, FL 33444**

Phone: 561-279-8883

Fax: 561-279-2230

[www.spadymuseum.org](http://www.spadymuseum.org)

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Larry Rosensweig

**Founder**

Vera R. Farrington

**Memorialized Member**

C. Spencer Pompey

Alfred Straghn

**Executive Director**

Charlene Farrington

*"Until the lions have their historians  
the tales of the hunt will continue to  
glorify the hunter." ...an African proverb*

September 8, 2021

The Florida African American Heritage Preservation Network (The Network) provides important development opportunities to member organizations and has been an important partner of the Spady Museum over the years. Since 2013, The Network has been providing:

- Training on internal structure
- Partnership development and cultivation
- Awareness of the importance of succession planning
- Awareness of the importance of attracting and grooming the next generation of museum professionals

Specific benefits to the Spady Museum have been:

1. Money to pay for museum interns. This is a most important resource that provides an additional staff person to carry out the mission of the organization. It also provides training for college students who may be considering a career in the museum or non-profit industry.
2. Technical training in collections care. Collections care training is critical for the staff who manages small community collections and this training for The Spady Museum's staff and volunteers afforded us the ability to continue to accept and professionally preserve the collections of South Palm Beach County black residents.
3. Continuing education and networking. The convenings held by The Network are educational from a local and national history perspective and provide opportunities to meet professionals in the museum, history and ancillary fields. Partnerships grow from these convenings that are financially and strategically beneficial.

Charlene Farrington  
Executive Director



African American Museum of the Arts

325 South Clara Ave.

DeLand, FL 32720

In 1989, Irene Dixon and her husband Rev. Maxwell Johnson retired and moved to Deltona, Florida. It was there that God gave her the vision of creating an African American Museum of the Arts. She did her research and discovered that DeLand, Florida did not have a museum devoted solely to African Americans art and culture. Therefore, she and Rev. Johnson founded the African American Museum of the Arts on September 22, 1994.

The creation of this Guide Manual is a roadmap for all museum especially, new and emerging museums of African American history and culture. It provides step by step training and guidance in professional development and other areas that would address the needs and challenges that African American museums directors and staff members would encounter. The Guide Manual is a much-needed tool to help African Americans cultural and historical museums to become self-governing, self-sustaining in the preservation of our heritage, history and culture. Much of our history has been lost, therefore, it is imperative that we become the “Keepers of our History” for the next generation to come.

Sincerely,

Mary Allen



September 5, 2021

Re: National Trust for Historic Preservation Grant

P.O. Box 5785 / Clearwater, Florida / 33758-5785

(P)

/ (F) 727-588-6104

Wow! The guide truly lets me stroll down memory lane! I especially recall an ice breaker <sup>727-588-6104</sup> Network facilitator used to begin her training session. She asked us to pull out a nickel and look at the date and share an event or program that we sponsored at our museum—one that occurred on the year of the nickel. That single incident initiated many borrowed ideas. One example was a Network member borrowed "Blended Lives" for a program on school desegregation, and another Network member borrowed "Uncrowned Queens" for a special exhibit. These exchanges have continued throughout the years and have been very successful. After all, why re-invent the wheel?

As far as the usefulness of the Guide, I can see where museums in their early development could use some of the content to assist with developing their Policy and Procedure Manuals; and it would be very helpful for strategic planning --vision of where the museum is going and what it wants to achieve; and perhaps the guide could be of assistance to grant writers.

Yes, the history is amazing! The guide does a great job of chronicling both the Riley Museum and the Network's histories.

One thing I thought about was in addition to enhancing what the late Mrs. Dorothy Thompson had already done to establish a museum in Clearwater, the writing of the Arcadia book, "Black America: Clearwater," was a catalyst for Dr. Randolph Lightfoot and me to establish a new museum to continue Mrs. Thompson's legacy.

I have a concern that presently we (museum managers) haven't done enough to document our grassroots efforts to endure this Pandemic Era. There was a time when newspaper clippings were a great asset for preserving local stories, but now they are a "dying breed." E-news is more difficult to accumulate and keep up with.

The Network has improved our internal structure and increased the museum's partnerships. We use guidelines we received from Network training sessions when we select board members, conduct strategic training sessions, and create our Policy and Procedure Manuals. As referenced in the Guide, we have participated in programming at other museums in the Network and vice versa, shared ideas on creating exhibits, and followed through on suggestions for establishing partnerships, such as with other historic museums in the area, and local colleges and universities. Furthermore, we have also established relationships with other museum directors from the Casting the Net consortium.

Submitted by:

Sandra W. Rooks, Executive Director, Pinellas County African American History Museum  
727-480-7572



September 6, 2022

Name- Pasha Baker, Executive Director  
Goldsboro African American  
Museum of History and  
Culture 1211 Historic  
Goldsboro Blvd Sanford,  
Florida 32771

Subject: Florida African American Heritage Preservation Network (FAAHPN) Teaching, Mentoring, Coaching and Leadership  
Accomplishment Profile

**FAAHPN Affiliation:**

- Florida African American Heritage Preservation Network (FAAHPN) – Member Museum
- Length of time with FAAHPN- 6 Years

**Administrative Functions Assumed/Acquired:**

- Duties/Tasks/Responsibilities – Statewide African American History and Museum advocacy with other African American Museums in Florida; Florida Legislative Appropriation Funding Process and Fund Acquisition; Grant Research Identification and Execution and sharing across the FAAHPN Membership and Grant Writing on behalf of the FAAHPN and guidance provided to some of the other FAAHPN member sites.
- Change in Duties/Tasks/Responsibilities Since Initial Contract- No Change; duties, task, responsibilities were progressive in nature, provided by the Executive Director.
- What are your current Duties/Tasks/Responsibilities - State African American History and Museum Advocacy on local, state and national levels, Completing of the Florida Annual Legislative Appropriation documents and lobbying on behalf of the FAAHPN; Grant research and sharing with the FAAHPN membership and Grant Writing training and advisement.

**Skill, Knowledge and Ability Development**

- Growth in programmatic and administrative Duties/Tasks/Responsibilities- My grant writing and Legislative policy writing has grown into more complex research and advocacy. This has resulted into more funding for African American Museums (FAAHPN) in the State of Florida, as well as for mymuseum.
- What do you consider as strengths that you have acquired in knowledge from initial to present - My strength as a result of mentoring, coaching and training has been in the way of African American Museum advocacy across municipal, state and national levels and increased understanding of legislative policy and procedure as it relates to appropriations. which to date is the main FAAHPN source of revenue.

**Personal Attestation of Membership, Opportunity and Progress:**

As a result of Mentoring, Training and Coaching I feel equipped to assume a greater role with the Florida African American Heritage Preservation Network as follows:

- Mrs. Barnes is my mentor and I have been apprenticed under her for the past 6 years. I learned the Legislative process and advocacy from her to enable me to continue to perform and transition these duties for FAAHPN when she retires.
- If I were to assume leadership of FAAHPN, I would feel very comfortable and well trained to provide leadership in the areas noted. As a long time museum member participant, I feel knowledgeable to assume other administrative, networking and collaborative communication responsibilities with the other member museums.

- Rate the value of FAAHPN as a successful! grassroots" network from 1 to 5 with five being the highest: **All 5's**

Communication Within the organization 1 2 3 4 5

Growth of member institutions 1 2 3 4 5

Value to communities and the State 1 2 3 4 5

Motivation of Members to Succeed 1 2 3 4 5

Leadership 1 2 3 4 5



**Wilma K. McKay, Managing Member  
McKay Management Consulting, LLC  
4004 Old Plantation Loop  
Tallahassee, Florida 32311**

Date: September 8, 2021

Subject: FAAHPN National Trust Grant

My affiliation with FAAHPN began in September 2017 only five months after my retirement as the Executive Director of the Florida Association for Community Action.

My primary function has been and continues to be management, coordination, and oversight of FAAHPN's fiscal operations as an inhouse consultant. My duties have ranged from budgeting, record maintenance in the state Dosgrants System, record keeping of documentation, generation of quarterly Expenditure Logs, pay requests, payments to museums, quarterly, cumulative, and ad hoc reporting as well as other special projects.

Although I have achieved a considerable breadth of skills and experience in executive management, budgeting, technology, and grants writing and administration, etc. during my 40+-years professional career, these past 4 years with FAAHPN have provided immeasurable personal growth in my knowledge of museum management, the African American culture locally and its contributions/impact statewide. Having the opportunity to spend the last 4 years in this space with Althemese Barnes has been broadening to say the least. She has been a true mentor and coach for me which I never expected. Lifelong learning, what a concept!

Working in the FAAHPN headquarters has given me a bird's eye view of its significance and critical value to the network. As such, I feel that it should receive the highest ratings of 5 in the following areas:

Communication Within the application	1 2 3 4 5
Growth of member institutions	1 2 3 4 5
Value to communities and the State	1 2 3 4 5
Motivation of Members to Succeed	1 2 3 4 5
Leadership	1 2 3 4 5



## Credits

### **John Gilmore Riley Center/Museum Board of Directors:**

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Maggie L. Butler, *Vice-Chairman*  
Emma Hill, *Secretary*  
John Occhuizzo, *Treasurer*

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#### **At-Large:**

Julianne Hare  
Byron Williams

## Contributors

Pasha Baker

Wilma K. McKay





# FAAHPN

Florida African American Heritage Preservation Network



The Florida African American Heritage Preservation Network (FAAHPN), a professional association, organized in 2001 by the John Gilmore Riley Center Museum. FAAHPN serves as an informational and technical assistance resource in response to a growing interest in preserving Florida's African American culture, of the African Diaspora as well as other related ethnically diverse historic resources globally.

[www.faaHPN.com](http://www.faaHPN.com)  
419 East Jefferson St.  
Tallahassee, FL 32301



Smithsonian  
National Museum of African American  
History and Culture



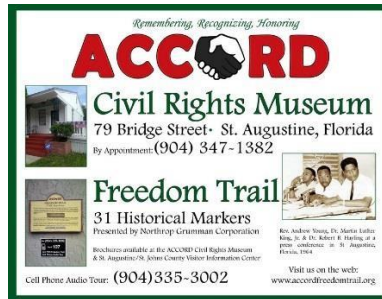


## FAAHPN of Museums and Cultural Centers

**A. Quinn Jones Home  
(Gainesville, FL)**

**Accord Civil Rights Museum  
(St. Augustine, FL)**

**African American History  
Society/Coulson House  
(Pensacola, FL)**



**African American Museum  
of the Arts  
(Deland, FL)**

**American Beach Museum  
(Amelia Island, FL)**

**Artists Showcase/ Historic  
Jenkins House  
(Palm Beach, FL)**



**ASH Gallery  
(Tallahassee, FL)**

**Bethune House  
(Daytona Beach, FL)**

**Blanchard Museum  
(Punta Gorda, FL)**







**Broward Library &  
Museum/African-American  
Research Library  
(Ft Lauderdale, FL)**



**Clara White Mission/Eartha  
White Museum  
(Jacksonville, FL)**



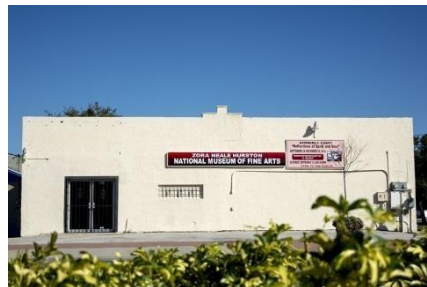
**Durkeville  
(Jacksonville, FL)**



**Carter Woodson Museum  
(St Petersburg, FL)**



**FAMU Meek/Eaton Black  
Archive/Museum  
(Tallahassee, FL)**



**Zora Neale Hurston Fine Arts  
Museum  
(Eatonville, FL)**



**FAMU/Union Bank Location  
(Tallahassee, FL)**

**Goldsboro Museum  
(Sanford, FL)**

**Glover School  
(Plant City, FL)**







**Higgs Beach African Burial Ground (Key West, FL)**



**Johnnie Ruth Clark/Mercy Hospital Historic Site (St. Petersburg, FL)**



**Kingsley Plantation (Jacksonville, FL)**



**Knott House Museum (Tallahassee, FL)**



**L.B. Brown Museum (Bartow, FL)**

**Lincolntown Museum & Cultural Center (St. Augustine)**



**Mary Harrell Museum (New Smyrna, FL)**



**Harry and Harriette Moore Restored Home (Mims, FL)**



**Howard Thurman Historic Home (Daytona Beach, FL)**







**Moseley House Museum  
(Eatonville, FL)**



**Old Dillard School Museum  
(Ft Lauderdale, FL)**



**Pinellas AA Museum  
(Clearwater, FL)**



**Luster All African American  
History Museum  
(Bartow, FL)**



**Rhoda Martin Center  
(Jacksonville, FL)**



**Riley Museum  
(Tallahassee, FL)**



**Ritz Theater and Museum  
(Jacksonville, FL)**



**Royal Theatre  
(St Petersburg, FL)**



**Spady Museum  
(Delray, FL)**





**Tallahassee Museum/History &  
Natural Sciences  
(Tallahassee, FL)**



**Wells Built Museum  
(Orlando, FL)**



**Williams Academy  
(Fort Myers, FL)**



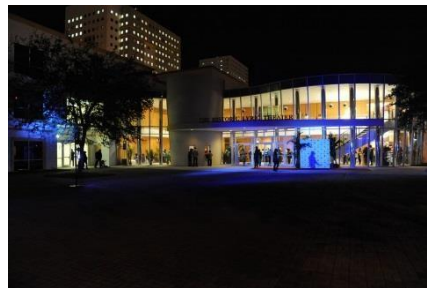
**Virginia Key Beach  
(Miami, FL)**



**Cotton Club and Cultural  
Center  
(Gainesville, FL)**



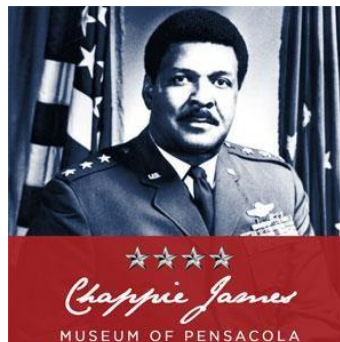
**Ella Jordan House  
(Pensacola, FL)**



**Chappie James Museum  
(Pensacola, FL)**



**Family Heritage House  
Museum  
(Bradenton, FL)**







**Manhattan Casino Historic Building  
(St Petersburg, FL)**

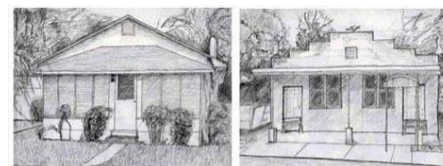


**Bing House  
(Plant City, FL)**

**African American Heritage Society East Pasco County  
(Lacoochee, FL)**



**Gifford Historical Museum and Cultural Center  
(Vero Beach, FL)**



**AAHSEPC**

AFRICAN AMERICAN HERITAGE SOCIETY OF EAST PASCO COUNTY, INC

Chartered by the State of Florida in 2004



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