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ABSTRACT

Making a Molehill out of a Mountain: Creating a Policies and Procedures Manual for the Confederate Reunion Grounds

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The goal of this project was to assist Dixie Hoover, Site Manager for the Confederate Reunion Grounds (CRG) in Mexia, Texas, in creating a cohesive set of policies and procedures for the site. The CRG was recently transferred from being a part of the Texas Parks and Wildlife to the Texas Historical Commission. After the change in ownership, Ms. Hoover was left with a site that had no clear cut set of policies and procedures for day to day operations. While the Texas Historical Commission had some overarching documents that would apply to all their sites, there was a lack of documentation specifically pertaining to the CRG. Ms. Hoover was left in a difficult position of shifting through various policies, some that just don't apply to her site, and some that are even out of date or obsolete to answer any questions that she or a customer may have.

What I did was to take the documents that Ms. Hoover had and organize them in a coherent and easy to navigate document. The end goal was that this would be primarily an online document due to its size and need for constant updates. Both Ms. Hoover and I recognized at the beginning of this process that it would be a massive undertaking and would not be fully completed by the time I was finished. My purpose was to set up a document that will constantly be added to and updated by other parties than myself and would serve as a formatting and stylistic guide.

By the time Ms. Hoover decided that I had reached a stopping point with this project, I had a manual that was 261 pages long and still not complete. This is definitely a work in progress and will continue to be added to and updated in order to match the CRG's needs.

Capstone

Dr. Holcomb

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Confederate Reunion Grounds Project

I chose to do a project for my Capstone rather than a thesis or an internship for a few reasons. I feel that a project will have a more direct relationship with my future career goals, and will lend experience to my resume. I am not interested in writing a thesis, and due to the scheduling conflicts of holding down a job and raising a family while I attend school, an internship is not workable. My advisor, Dr. Julie Holcomb, connected me to Dixie Hoover at the Confederate Reunion Grounds (CRG) in Mexia and let her know that I was interested in completing a project that focuses on museum administration. Ms. Hoover had such a project in mind that would allow me to fit it around my already busy schedule wherein most of the work could be done from home.

The CRG is a seventy-six acre property located on the banks of the Navasota River. From 1889-1946, veterans of the Civil War would gather at this site with their families to commemorate their service in the war and foster a fellowship among the veterans. There were picnics, singing, dancing, and fundraising activities. At the site today there are the architectural remnants of some structures as well as a functioning Civil War era cannon. This facility is largely a park setting with hunting, fishing, kayaking, canoeing, and hiking trails available. The CRG is also located close to the Ft. Parker State Park.

What Ms. Hoover needed was for me to create a cohesive policies and procedures manual for the CRG. The CRG had recently changed hands from Texas Parks and Wildlife (TPW) to the Texas Historical Commission (THC). Due to this changeover, Ms. Hoover literally had no site specific policies when she arrived, just various THC policies that didn't necessarily apply to her site. If she needed to find out the policy for a specific situation, it involved sorting through the various manuals in her office plus searching the THC's J drive or website and hope that she could find the right one. Clearly, this is not an efficient way to run a museum or any kind of business. Ms. Hoover was faced with an issue that many museum administrators have faced before, which is not coming into a museum with no set policies at all, but rather a museum with scattered and unorganized policies.

What Ms. Hoover needed for me to do was to basically take these numerous policies and begin to organize them into one manual that could be easily maintained and updated as needed. We both recognized the enormity of this task and knew from the start that this project would not end in a completed document. Rather, I would complete as much as possible, and more importantly, I would create a baseline for the design and formatting of the manual that would make it easy to replicate as more policies are input. This is one part of the project that frustrated me simply because I am a person who likes to finish what they start. Knowing from the beginning that I would not actually get to take this project to completion was a little agitating because it also meant that I would not have a clear ending point to the project. How would I know when I had done enough? For that, I had to defer to

Ms. Hoover, since she was the one supplying me with all the materials, and she would be the one to let me know when she felt that we had enough to bring this project to a close.

To begin the project, I met with Dixie at the CRG so I could get a feel for the grounds and facility. Our initial meeting was to determine the scope of and hopes for this project. Ms. Hoover wanted a document that would function primarily online, and therefore wanted a manual that was easy to navigate without necessarily using a hard copy. We also needed a way for me to show my progress that was easier than e-mail. At first, I thought I might use an external hard drive to carry information back and forth to the CRG, but quickly determined that would be too cumbersome and inconvenient as Ms. Hoover would want to see my progress between site visits. I settled on using Google Drive, which worked great for this project. I was able to upload all my document changes so that Ms. Hoover could view and edit them at her convenience. I also decided, after gathering some input from Professor Eric Ames, that rather than just creating one large working document, I would create separate documents for each section in the manual. By utilizing this plan, if Ms. Hoover needed to update a single section in the future, she could do that without having to alter the entire original document. This would also allow for me to have multiple copies of a section saved, creating a redundancy in case I messed up a section. I created a folder of the original, unaltered documents, a folder of the edited documents, and then the final combined manual. After making these technical decisions, it was time to start one of the most important parts of this project, which was designing the table of contents.

Although it doesn't seem like it would be a terribly important part of creating a manual, designing the table of contents is truly one of the more important choices that I had to make with this project as it let me decide from the beginning what information I would and would not be including. Ms. Hoover provided me with a copy of the THC's Magoffin House Policies and Procedures table of contents to use as a template for the CRG. Even though the Magoffin House is a historic home, I was still able to get a good idea of what I needed to include to make my manual functional. I decided to divide my manual into eleven sections: Original Document Origins and Locations, Office and Staff, Emergency Procedures, Employee Safety Handbook and Other Guides, Collections, Media/Marketing, Rentals and Photography, Maintenance, Friends of the CRG, Volunteers, and Sample Forms. I decided that whatever sections I ended up not having enough information to complete, I would insert a page holder to make it easier to come back and add on at a later date.

Once I had a table of contents that Ms. Hoover approved of, it was time to begin the actual creation of the manual. This involved deciding on some of the simple design choices that would help this document look and feel both cohesive and professional. I chose to use an Arial font throughout the manual, with consistent sizing for titles and the body of text. I then decided on a simple and easy to replicate footnote that would include the page number, section title, and the date of the last update made to that particular section. Including the update information is a very crucial component to make this manual current and functional, so that at a glance you know if you are dealing with a recent policy.

According to Ms. Hoover, the THC is notorious for sending out multiple updates to policies and forms but not labeling them. So when site directors select a form, unless they made sure to replace the old one with a new one, there was no way to tell if they were using an out-of-date form. This should not be an issue with this manual. After making all the stylistic choices, I began by proofreading and editing the documents Ms. Hoover sent to me before editing them stylistically. Once I finished my edits, I notified Ms. Hoover of the changes and uploaded them to Google Drive for her approval. This opened up a complication due to working with documents directly copied from the THC. All the THC documents could not be edited, I could only adjust them stylistically. This compelled me to use an entire document that may or may not have fit the CRG's needs and would cause the manual to be longer than necessary so as to incorporate all the THC documents in their entirety. This was one of the parts of the project that was a little frustrating but was an excellent learning experience about dealing with a large, overarching bureaucracy. Sometimes it is just easier to accommodate their requirements than try to go through all the various channels to adjust their documents to suit the CRG specifically.

Now that I have made my stylistic choices and editing, the bulk of this project was simply repeating this process over again for each document that Ms. Hoover sent me. This is where I ran into another issue, which was the existing formatting of some of the documents. Most of the documents were easy to adjust to the style I chose, but one in particular was troublesome. The THC's Collections policy is about seventy pages long, and when I went to simply change the font, the formatting for the entire document became

skewed to the left and a weird gap ran through the middle of the body of text. I requested Professor Ames' assistance with this and he admitted he hadn't seen this kind of reaction to a simple font change before and did not know how to fix it. Therefore, I was left to go through every page and slowly, laboriously, backspace each line to make it align correctly. This was the most dramatic issue I had with technology on this project. I'm happy to say that for the most part, everything worked the way it should. So, after repeating this editing process for the documents over and over, I finally came to a stopping point. Ms. Hoover decided that I had enough information to make a solid start to the manual and told me that once I had finished with the last document she sent me, I could start the process for finalizing the document.

In order to combine all the individual documents I had edited into one large document, I needed a full version of Adobe Acrobat Pro to combine the files into one pdf file. I chose to use a pdf file so that I could lock it and be reasonably sure that no one who isn't authorized could edit or change the manual. After combining all the files, I printed off a rough draft of the manual, which came in at two hundred and sixty pages, so that I could proofread for stylistic continuity and any other obvious flaws that would become obvious after printing. After going through and making another round of edits, I then created bookmarks so that a user could travel easily through the document. Instead of hyperlinking each section of the table of contents to their associated section, I chose instead to use Adobe's bookmarking system. By creating bookmarks, there would be a list displayed on the left side of the document that would make it easy to travel back and forth, whereas a

simple hyperlink would only take me to the location I selected and not allow for a way to go back to the original location. I also attached an interactive form I had created, the Deed of Gift form, to the pdf file in order to allow a user to download the individual form to their computer instead of having to download the entire document to get to the form. It was very easy to attach forms to the document with Adobe, so ultimately I would like to have all the official forms available through an attachment to be downloaded individually as needed.

Now that the manual had a semblance of completion, it was time to wrap up the project and plan for what needs to happen to it in the future. The very nature of this manual means that it is not something that can be stuck out in the ether and still retain its functionality. It is imperative that it be constantly maintained and updated every time the THC or CRG updates their policies or forms. Ms. Hoover and I recognized from the beginning that this is a project that would never truly be finished. There will always be additions to be made or slight adjustments to create a more user friendly experience. This will be a working document, constantly being maintained in order to keep it useful. As a finishing touch for my part of this project, I created a simple set of instructions for Ms. Hoover or another intern to follow in order to add to this manual easily over time.

I learned a lot from this experience, from the technology challenges I faced to the ways that I need to handle a bureaucracy and its paperwork. Probably the most significant lesson I learned was to understand that when dealing with an organization such as the THC, you are sometimes left with less flexibility than you would like when it comes to editing corporate documents or even being able to choose not to include extraneous

materials. This is definitely a lesson that I will no doubt be applying in my future job, as there will almost always be another power above me to which I need to defer in these types of situations. Being able to create this type of working document despite whatever difficulties might be faced is an essential skill for a museum administrator. Without a definitive and easy to find set of policies and procedures, it would be impossible to maintain consistent and high quality standards for a museum and its staff. I am grateful to have had the opportunity to work on this project since it will truly have a positive impact on the CRG. I am confident that the skills I gained working on this project will benefit me on my future career path wherever it may take me.

Works Cited

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