

**Professional Development  
Strategic Plan  
2013-2014**

**The Foundation of the American  
Institute for Conservation  
of Historic & Artistic Works**

**April 2013**

## TABLE OF CONTENTS

<b>TABLE OF CONTENTS</b> .....	<b>i</b>
<b>EXECUTIVE SUMMARY</b> .....	<b>ii</b>
<b>BACKGROUND</b> .....	<b>1</b>
I. FAIC MISSION, VISION, AND CORE VALUES .....	1
II. OVERVIEW OF FAIC’S PROFESSIONAL DEVELOPMENT ACTIVITIES .....	2
III. EXTERNAL FACTORS .....	3
A. The Nature of Professional Development for Conservators .....	3
B. Competition .....	3
C. Strengths/Weaknesses .....	6
D. Threats and Opportunities .....	6
<b>STRATEGIC OBJECTIVES</b> .....	<b>7</b>
<b>GOALS FOR 2013-2014</b> .....	<b>8</b>
<b>ACTION PLAN</b> .....	<b>12</b>
I. STRUCTURE AND SELECTION OF ACTIVITIES .....	12
A. Criteria .....	12
B. Co-sponsorships .....	13
C. Length and Timing .....	13
D. Locations .....	13
E. Marketing .....	13
II. TIME LINE.....	14
<b>APPENDIX I: History of FAIC Professional Development Events, 2002- 2010</b> .....	<b>15</b>
<b>APPENDIX II: Guidelines for Co-Sponsorships</b> .....	<b>17</b>
<b>APPENDIX III: FAIC Workshop Registration and Cancellation Information</b> .....	<b>20</b>

## **EXECUTIVE SUMMARY**

FAIC's professional development program has grown quickly since its creation in 2001. Beginning with the establishment of the FAIC Endowment for Professional Development, initiated by a grant from The Andrew W. Mellon Foundation, along with operating funds provided by the Mellon Foundation, the program has grown in size and impact. FAIC has been successful at supplementing Endowment funds with project grants that have allowed for curriculum development, distance learning initiatives, scholarships, and international projects.

The current programs have begun to meet the needs of the conservation community, as revealed in surveys and planning retreats by conservation educators. The priority will remain on geographically-dispersed workshops to support the needs of mid-career professionals. FAIC will continue to leverage its resources by building cooperative arrangements with other organizations and institutions. Supporting activities, such as program assessment, curriculum development, instructor development, etc. will continue.

Continued emphasis will be placed on seeking additional project grants and sponsorships that will also include funds for administrative and overhead costs, developing instructor skills, and integrating FAIC's growing electronic capabilities to support professional development in the conservation profession.

**The Foundation of the  
American Institute for Conservation  
of Historic & Artistic Works  
(FAIC)  
Professional Development Strategic Plan  
2013-2014**

**BACKGROUND**

**I. FAIC MISSION, VISION, AND CORE VALUES**

**Mission Statement**

The Foundation of the American Institute for Conservation of Historic and Artistic Works (FAIC) undertakes and underwrites programs and initiatives to advance the conservation profession nationally and internationally in all its facets and applies the expertise of the profession in addressing global artistic, cultural, and historic preservation priorities.

**Vision Statement**

FAIC envisions a world that values the conservation profession as a means to preserve international cultural materials and to increase knowledge of our shared cultural heritage for future generations.

**Core Values**

*Preservation of Cultural Heritage*

FAIC promotes the preservation of cultural heritage as a means toward a deeper understanding of humanity—the need to express ourselves through creative achievement in the arts, humanities, and sciences. We honor the history and integrity of these achievements through the preservation of cultural materials for future generations.

*Advancement of the Field*

FAIC promotes the advancement of expert knowledge of materials and technologies, and mastery of conservation and preservation. We promote the understanding of the values and contexts of cultural heritage and stress informed decision-making in conservation. We are dedicated to service in the field, research, sharing knowledge, and continued education.

*Building Operational Strength and Sustainability*

FAIC embraces sustained, strategic management of our organization, reflecting our responsibilities to conservators, allied professions, partners, the public, and our cultural

heritage preservation agenda. FAIC supports and enhances the goals of AIC, and in turn builds on the achievements of AIC and its members.

(From “FAIC 2013-2015 Strategic Plan,” approved by the FAIC Board of Directors January 31, 2013)

## **II. OVERVIEW OF AIC AND FAIC’S PROFESSIONAL DEVELOPMENT ACTIVITIES**

As of this writing there are over 3600 members of AIC. Nearly 1200 members are in the Professional Associate or Fellow category, which distinguishes them as conservation professionals who meet certain standards and follow the AIC code of ethics. In any given year, 750 to 1200 people attend the Annual Meeting. The Annual Meeting offers formal presentations and sessions on aspects of conservation, as well as an opportunity for less formal exchanges between members on tools, techniques, and career paths. Workshops, offered at the Annual Meeting, usually focus on specialty topics for periods of one-half to a full day for a modest additional fee.

Many other facets of AIC and FAIC’s operations support professional development. The AIC publications, ranging from the peer-reviewed *Journal* of the AIC to Specialty Group publications and the *AIC News*, also enable conservators to disseminate new treatments, materials, information, and research. A Samuel H. Kress Foundation grant supports preparation of book manuscripts for publication. The AIC web site offers links to training programs, list serves, other organizations, and publications of value to conservators.

The Foundation of the American Institute for Conservation of Historic & Artistic Works (FAIC) has several programs in place to support continuing education. The Individual Professional Development Scholarships support members seeking continuing education and training offered by AIC and other institutions. The Workshop Development Grant is designed to encourage regionally-based workshops, with discounts for AIC members. Stout Scholarships help bring students to conferences or workshops. Christa Gaehde and Carolyn Horton grants support professional development and research for book and paper topics. Small Meeting Support and “Take a Chance” Grants are available to support research and problem-solving. With support of the Getty Foundation, FAIC has assisted conservators from Latin America with the costs of attending the Annual Meetings. Kress Conservation Fellowships, administered by FAIC, support paid fellowships for emerging professionals.

Successful grant proposals have afforded special opportunities for members, such as the French Furniture Study Tours (funded by The Andrew W. Mellon Foundation and The Florence Gould Foundation) and Disaster Response workshops (funded by the National Endowment for the Humanities and the Institute for Museum and Library Services). Five additional NEH grants have supported workshops and scholarships from 2004 through 2013, and a Getty Foundation grant enabled curriculum development activities.

Professional development was recognized in AIC’s 1995 Strategic Plan as an important initiative, but funds and staffing were not available to fully implement a cohesive program until 2001. The Endowment for Professional Development and the addition of a Professional

Development Director position solidified an on-going commitment to professional development.

The budget for the Professional Development program is allocated annually by the FAIC Board of Directors, typically in the late fall for the upcoming calendar year. The AIC budget follows a similar schedule, and includes the budget for the workshops at the AIC Annual Meeting. The program is guided by the AIC Board Director for Professional Education and Training. The Education and Training Committee reviews workshop proposals and scholarship applications and provides on-going input on policies and programs. The Professional Development Director (PDD) managed and helped to develop the programs. In the spring of 2009, the PDD position was changed to an FAIC Institutional Advancement Director (IAD), supported by an Education Manager, who reported to the IAD. In the spring of 2010, due to personnel changes and reduced investment earnings, the Education Manager role was split between the IAD and a Development and Education Associate position (now the Development and Education Coordinator). The IAD reports to the Executive Director of AIC/FAIC. Funding for the programs come from project grants, endowment earnings, and registration revenues.

### **III. EXTERNAL FACTORS**

#### **A. The Nature of Professional Development for Conservators**

Professional development for conservators must be approached from a broad perspective. Artistic and historic works are, by definition, simultaneously material objects (made of wood, paper, cloth, etc.) and cultural objects (containing meaning beyond their function). Thus, a carpenter may need to learn effective ways to fix a broken chair leg, but a conservator facing the same problem would need not only this technical knowledge, but also the historical and cultural knowledge to approach each object and problem within its historical context. Most training, therefore, should allow for discussion, updates on the latest in conservation science, case studies, and inclusion of a philosophy of treatment (or, in some cases, whether to treat at all). In any taxonomy of education, this is extremely high-level learning, and must be carefully structured to be successful.

“Ethical practice requires a thorough, sensitive understanding of complicated factors and continuing education allows the practitioner to stay current with new treatment, research, and analytical techniques. Preservation professionals make decisions that affect global cultural heritage for centuries to come. The need for continuing education, including the creation of new programs and information-sharing resources, is widely recognized and supported in the preservation profession. In a 2009 survey, AIC members ranked continuing education, publications/information resources, and networking/information exchange as three of their highest priorities” –from draft of “Position Paper on Continuing Education for Preservation Professionals,” 2013.

#### **B. Competition and Cooperation**

FAIC is the leading provider of continuing education courses for conservators in the United States. Its educational programs reached 8,071 professionals at 272 events (held in 31 states, the District of Columbia, and online) in 2001 through 2012. Other opportunities for professional development include occasional workshops and presentations by museums or

other associations, a few structured, recurring programs such as those at the Campbell Center and West Dean College, and graduate degree programs offered by several American and foreign universities. FAIC has seen these programs as complementary rather than competitive. FAIC offers professional development awards to assist AIC members who wish to continue their professional education through non-degree course offerings, whether those courses are offered by FAIC or not.

The member survey administered in the summer of 2001 yielded a good picture of where members sought training, and what budget they had to work with. At that time, on average, members attended three events sponsored by other groups for each FAIC event attended [*Survey 2001*, p. 17]. A new survey in 2006 showed that FAIC provided 35% of continuing education programs for AIC members [*Survey 2006*, p. 17]. The most favored form of education was still self-study using books and periodicals, but FAIC sources are a close second [*Survey 2001*, p. 29; *Survey 2006*, p. 31]. From 1997 to 2005, 26% to 40% of the membership attended at least some portion of the annual meeting; about 6% of the membership typically attended the workshops at the annual meetings [*Survey 2006* p. 41]. Despite increasing attendance and a growing number of FAIC education offerings from 2001 to 2006, the 2006 survey showed that there was an overall decline in the number of continuing education programs attended, and an increase in the level of self-funding for continuing education. The inference is that conservators are increasingly less able to support their continuing education needs.

FAIC's 2009 compensation survey showed that only 28.2% of conservators working in museums received employer support for continuing education costs, a figure that has declined from 33.2% reported in 2006 and 38.1% reported in 2001. Those in libraries fare somewhat better, with 41.3% reporting continuing education benefits. The compensation survey also showed that, of the many conservators working in private practice, nearly 58% are solo practitioners, who not only pay for education expenses out of their own pockets, but lose income while away from their practices.

A roster of over 70 organizations that offer on-going seminars, workshops, or other non-credit training of interest to conservators has been developed from the *AIC Directory*, lists compiled by the Education and Training Committee, and internet searches. Some of the most significant are discussed below.

The regional conservation centers and regional conservation membership organizations offer varying numbers of workshops and programs for professional development. FAIC has successfully partnered with many of these organizations to offer programs in diverse geographic locations.

The Campbell Center, in Northern Illinois, offers structured, recurring workshops in key areas of interest to conservators. Their costs are still reasonable, typically \$1100-1500 for a five-day, hands-on workshop, including housing and two meals per day. FAIC has co-sponsored several workshops with the Campbell Center and presented a workshop directly in 2005 (Recovery of Wet Materials Following a Disaster).

The Getty Conservation Institute (GCI) is not currently offering workshops for conservators with regularity, although their Education Department works closely with various research projects to disseminate information and techniques on an international level. GCI has sponsored two Directors' Retreats for AIC and also partnered on workshops on writing, abstracting, wall murals, panel paintings, and XRF techniques.

The Canadian Conservation Institute (CCI) also offers training workshops, although some of their offerings are restricted to Canadian nationals. In addition to scheduled courses, CCI maintains a catalog of workshops and presentations (with French and English-language instructors) that can be "booked" by sponsoring institutions throughout Canada. CCI assisted with the development and teaching of the "Adhesives for Conservation" workshop and the Museum Lighting workshop.

FAIC has supported summer courses presented by NYU for conservators, and has partnered with University of Delaware, Buffalo State University College, UCLA, and the University of Texas to present FAIC courses.

Many other organizations offer programs of interest to conservators, including the Society of American Archivists, National Preservation Institute, and the National Center for Preservation Technology and Training. The McCrone Institute and McCrone College of Microscopy offer a few courses specifically aimed at the conservation profession, although many of their broader courses can be extremely useful. Other organizations offer workshops in specialty areas, such as the American Library Association, the American Institute of Architects, and the George Eastman House. Trade organizations, such as the American Chemical Society and American Association of Textile Chemists and Colorists, may also offer training of interest to conservators in analytical techniques or specific media. These organizations focus primarily on their core membership, so not all specialty groups or professional needs of AIC's members are adequately served, and offerings tend to be sporadic in nature.

There are few sources for distance learning courses on conservation topics, although [www.connectingtocollections.org](http://www.connectingtocollections.org) and [www.museumclasses.org](http://www.museumclasses.org) offer collections care programs.

International sources of training are also used by AIC members. West Dean College, ICOM-CC, Institute of Paper Conservation, International Academic Projects, and other organizations are offering opportunities ranging from conferences to multi-week courses. Registration fees and on-site housing are sometimes low enough that, even with exchange rates and airfare, total costs can be competitive with events held within the U.S.

FAIC has worked cooperatively with many other organizations and institutions over the years. Many FAIC workshops have been held at museums and libraries in exchange for one or two places for participants. Other than portions of the Campbell Center offerings, no other U.S. organization is focused on professional development for conservators across specialty areas.



### **C. Strengths/Weaknesses**

FAIC's connection with AIC members is a great strength. These individuals and organizations are already committed and involved in AIC activities, and offer a diverse array of strengths, knowledge, and skills. AIC and FAIC also boast of active, hands-on Boards, committees, Specialty Groups, and involved members. Many workshop instructors are AIC members. FAIC's Conservation OnLine continues to grow in resources, and the AIC/FAIC website offers increased opportunities for interactivity and e-commerce.

Weaknesses include lack of permanent space for educational activities. Hotels, laboratories, and other facilities must be negotiated on a case-by-case basis. On the other hand, this also means there is a limited amount of overhead to support. Most facilities for training opportunities may be arranged through collaborations with organizations that have these facilities around the country. The membership is spread out throughout the United States and other countries. Further, the membership is fairly evenly divided between conservators in private practice, who must finance their own continuing education, and those working for not-for-profit institutions, which are often pressed for professional development funds and providing leave time. Cuts in government funding and the continued economic slump will likely have a negative impact on conservation budgets for some time to come.

### **D. Threats and Opportunities**

The Professional Development Endowment, with its initial support from The Andrew W. Mellon Foundation, provides a stable base for operating professional development activities. However, decreases in investment earnings, grant amounts, and unrestricted gifts has meant that FAIC's professional development activities, despite their growth in variety and complexity, are supported by approximately the same number of staff hours as they were in 2007.

The new AIC/FAIC website, expected to be active in 2013, will offer greatly enhanced opportunities for online applications, registrations, advertising, links to social media sites, and other "Web 2.0" features that were not possible previously. FAIC's management of Conservation On-Line (CoOL) may also open new opportunities for providing educational resources to conservators worldwide.

FAIC recently completed a strategic planning and transformation project, which produced a new strategic plan in the winter of 2010 (updated in 2012). This project was aimed at transforming FAIC into a more active fund-raising and outreach-oriented entity. The organizational and program shifts will likely have a major impact on FAIC's professional development projects in future years.

Strategic planning summits organized in 2009 identified key education needs in the emerging areas of care of modern and contemporary art, including electronic media and time-based media (These are being addressed through a series of workshops funded through NEA and other sources) and preventive conservation. Overall, a need was seen to include courses for collections managers, archaeologists, tribal museums, and other related professionals, in order to share conservation knowledge with the many other people involved in preserving

collections in the United States. AIC's new Collections Care Network is identifying priorities for training in this area.

Changing trends in the economy may have an effect on attendance of professional development offerings. When funds are tight, conservators in private practice may not be able to afford professional development activities. Budget cuts within museums, libraries, and other employers frequently limit funds available for professional development. Reduced costs in delivering distance learning courses may provide some new opportunities.

Heritage Preservation's "Heritage Health Index," released in December 2005, reports that approximately 1/3 of collecting institutions spend \$3000 or less each year on conservation. One could hope that the published research will result in increased spending on preservation, but much will depend on the overall economic climate.

Staff time for developing new curriculum is extremely limited, but there remains a clear need for FAIC to provide refresher and "fill in the gaps" courses to help mid-career conservators keep up with new developments in the profession. At the same time, FAIC should not duplicate the training provided by existing graduate programs in conservation.

Some of the challenges have been and will continue to be:

- continually identifying the highest priorities for the membership and conservation professionals as a whole
- structuring a program that fills gaps within offerings by other organizations and institutions, avoiding coincidental overlaps
- marketing topics that may not be popular, but may be needed to grow the field professionally

## STRATEGIC OBJECTIVES

The Strategic Plan for Professional Development fits into the broader AIC and FAIC Strategic Plans. Education programs are identified as enhancing member benefits and assisting with outreach to affiliated professionals and the public. Providing educational services to conservation professionals is especially highlighted in the FAIC 2013-2015 Strategic Plan:

### **Goal II**

#### **Advance the Profession**

*The Foundation's mission is to ". . . advance the conservation profession nationally and internationally in all its facets. . ." and has created programs that support this mission. These are reflected below and in each goal of the strategic plan.*

[...]

Maintain quality scholarship and fellowship programs.

- Review all current guidelines and processes and revise to standardize and simplify.
- Seek additional funding for the programs.

[...]

## **Goal IV**

### **Strengthen the Professional Educational Program**

*One of the core missions of FAIC is to develop, refine, and support continuing educational opportunities to serve conservation professionals throughout their careers. The FAIC Strategic Plan for Professional Development, updated regularly, provides guidance for this effort.*

### **Strategies**

Strengthen current programs.

- Continue to assess all FAIC educational programs to ensure relevance, focus, value, and need, building on past assessments.
- Continue existing programming.
- Seek appropriate sponsorships and other funding for programs.

Expand online programming.

- Revise and migrate existing online courses to new platform.
- Create additional online courses and webinars.
- Develop cost-effective online learning modules.

[[http://www.conservation-us.org/\\_data/n\\_0001/resources/live/FAIC%202013-2015%20Strategic%20Plan.pdf](http://www.conservation-us.org/_data/n_0001/resources/live/FAIC%202013-2015%20Strategic%20Plan.pdf)]

### **Overall Considerations**

FAIC's Professional Development activities have primarily been tailored to help "fill in the gaps" in conservators' training as well as to update their knowledge and skills. These courses follow learning paths identified in the Qualifications Task Force report [AIC, "Defining the Conservator: Essential Competencies," 2003. [http://www.conservation-us.org/\\_data/n\\_0001/resources/live/definingcon.pdf](http://www.conservation-us.org/_data/n_0001/resources/live/definingcon.pdf)]

There are many instructional vehicles and formats that could be used to reach these objectives. These may include hands-on workshops, professional development tours, lectures and various forms of distance learning (video, interactive, web access) that can be geographically dispersed throughout the mainland U.S. Balancing the resources available, the expectations of funding agencies, and the needs of the membership, priority may be given to in-depth coverage of topics requiring 1-5 days.

## **GOALS FOR 2013-2014**

Note: Many of the following activities are already taking place. Rather than use the phrase "continue to..." repeatedly, new initiatives are identified as such.

- I. Assess and evaluate programs.
  1. Identify Professional Development needs in the profession.
    - a. Further evaluate and receive guidance from the surveys administered in 2009, 2006, and 2001.

- b. Solicit on-going input from the Education and Training Committee, Specialty Groups, the AIC and FAIC boards, and organizations offering similar opportunities.
  - c. Solicit information about educational needs on all workshop evaluation forms.
  - d. Add and organize expressed needs in a database for analysis.
  - e. Prioritize the most-requested workshop topics as well as identify key training needs in the field.
2. Examine and assess Professional Development activities.
- a. Continue workshop evaluations (measuring satisfaction).
  - b. Develop simple pre- and post-tests for selected events (measuring learning).
  - c. Review this strategic plan on an annual basis to ensure that the program is responsive to members' needs.

## II. Strengthen learning experiences

### 1. Enrich curriculum.

While some topics have already been developed by individuals, groups or organizations, other important topics have been identified but have not yet been developed into an effective curriculum. Significant resources – money, expertise, and time – are usually needed to develop specific courses. Many of FAIC's Professional Development programs have consisted of workshops that already have a developed curriculum and instructors who are known to be effective. Some courses have involved a moderate amount of research and development time, such as the digital documentation, outdoor sculpture, and several of the Collaborative Workshops in Photograph Conservation. It is important to develop new topic curricula in response to known needs and to seek the resources necessary to do so. The "Adhesives for Conservation" and "Business and Management Practices for Conservators" are examples of major curriculum development projects. Modern materials, electronic media, preventive conservation, and additional emergency response courses have been suggested for future development. Funding through project grants will need to be sought in order to implement any new curriculum projects.

### 2. Align events with learning paths/core competencies.

Building on the documents created by the Collections Care and Qualifications task forces, workshops can begin to be organized by the knowledge, skills, and abilities recognized as needed by conservation professionals. For clarity to the membership and for marketing purposes, workshops and other activities have been organized into thematic groups. A "series" in this sense may consist of events which fit into a theme, even offered only sporadically; an event repeated in several locations over a period of time; or a group of related events offered in various locations. Each series would address a recurring need of the membership. The organization of workshops around recurring needs allows for a long-range view of professional development, a planned cycle for repeating topics, and opportunities for seeking outside funding. Additional workshops not fitting into the series' topics could of

course still be offered as needed – the series are not meant to restrict, but to focus efforts.

Possible series could be based on:

- a. Opportunities to develop existing skills by working with leading experts.  
A series of hands-on workshops that allow mid-career conservators to work with leading experts in a particular treatment technique. The focus would be on hands-on practice and discussion of specific cases. These have been called “Master Studies.”
  - b. New technologies, tools, materials.  
A series of hands-on workshops and/or lectures devoted to new materials, new tools, new techniques of interest and use to membership across specialty group borders, entitled “Current Issues.”
  - c. Issues for Conservators in Private Practice.  
A series focusing on the particular needs of conservators in private practice. Both the 2006 and 2001 surveys indicated that 62 to 63% of the membership conducts at least some of their activities as private conservators [*Survey 2006*, p. 1]. AIC’s current distance learning offerings have been built within the larger theme of “Business and Management Practices for Conservators.” Additional courses will be developed and offered on a rotating basis. Materials developed for the distance learning courses may also be repurposed as web or print resources as well.
  - d. A series repeating the most popular workshops and/or presentations from the Annual Meeting or from other venues in one or more locations at other times of the year or produced as webinars. Possible series title: “Hot Picks”.
  - e. Continue the series of “Collaborative Workshops in Photograph Conservation,” funded by an endowment grant from The Andrew W. Mellon Foundation. FAIC assumed management of this highly regarded series of workshops and seminars in 2010.
  - f. Other needs identified from the member survey and future input.
3. Strengthen and enrich instruction.
    - a. Provide feedback from evaluations.
    - b. Encourage rehearsals, sharing of outlines with colleagues, staff.
    - c. Provide assistance with print, a/v materials, encourage creation of materials for future reference and use by participants.
    - d. Provide instructor guidance. Although formal training may not be practical, FAIC should provide more complete guidelines and teaching tips to all instructors.

### III. Leverage resources

1. Connect with professional partners and the conservation community.  
Co-sponsorship of selected workshops or other educational opportunities has been an effective method of expanding programs without stretching resources and manpower too thinly. FAIC has partnered with AIC specialty groups, related organizations, regional guilds, and regional centers in the past. AIC’s Book and Paper, Electronic Media, and Wooden Artifacts Groups, for example, have partnered

several times with the professional development program. Unlike the Workshop Development grants, a co-sponsorship initiative seeks to identify effective programs of interest to AIC members and encourage the repetition of the programs elsewhere in the country for the benefit of the membership.

- a. Seek to co-sponsor appropriate professional development activities.
- b. Continue and encourage cross-marketing of appropriate events.
- c. Develop on-going relationships regionally in order to offer activities at facilities throughout the country.

2. Utilize Annual Meeting workshop opportunities more effectively.

The workshop day in conjunction with the Annual Meeting offers a good opportunity to leverage small amounts of FAIC Endowment funds to reach a receptive audience of conservators at little additional cost or time. Recent examples have included the 2007 pre-conference workshops on “Museum Exhibit Lighting” and the 2010 and 2011 workshops on “Hinging and Matting of Oversized Works” and “Best Practices in Conducting General Conservation Assessments.” Topics that call for one-day formats could be more actively targeted. The experience since 2001 has shown that organizing one-day workshops outside the Annual Meeting takes as much time and focus as four- or five-day workshops, and are difficult to market.

3. Leverage professional development activities to be more widely available.

Offer repeated workshops in various locations, explore distance learning options, consider book/multimedia formats, etc. as appropriate to the material.

- a. Face-to-face workshops should ideally be offered at multiple sites or at least rotate geographically.
- b. Given the costs of attending face-to-face workshops, blended learning (in which part of a workshop is delivered online or through other methods) should be employed when feasible and effective.
- c. Online courses in appropriate topics (such as the current “Business and Management Practices for Conservation”) will continue to be developed and offered as funds and staff time permit.
- d. Material created for online (and other) courses should be made available in other formats as appropriate and feasible, such as printed pieces or online content.
- e. Make FAIC-owned course outlines and materials available to the larger conservation community when appropriate and feasible.

4. Develop and maintain additional resources on the AIC/FAIC web site to support Professional Development.

- a. Use website capabilities to support courses with downloads of materials, weblinks, discussion pages, etc. as appropriate.
- b. Continue to offer web-based needs surveys and program evaluations.
- c. Look for opportunities to “re-purpose” course materials for member and public information on website.

5. Coordinate Professional Development activities with the proposed educational opportunities for the general public and allied professionals to promote the conservation profession. Such activities will require additional funding and staff time.

IV. Develop funding sources.

Work to develop funding sources for on-going support of Professional Development. Given the incomes of conservation professionals, the expense of running hands-on workshops, and the limitations on the number of participants for such events, most professional development activities will not generate more revenue than expenses. Additional unearned income from endowment growth, donations, grants, and sponsorships for specific programs will be needed.

## **ACTION PLAN**

### **I. STRUCTURE AND SELECTION OF ACTIVITIES**

#### **A. Criteria**

The 1050 course suggestions made by members in the 2006 Survey and the 1138 education suggestions made in the 2001 Survey spanned a wide range of topics. Over 450 additional topics were collected in the 2009 needs survey. Approximately 1000 suggestions were collected on workshop evaluation forms between 2001 and 2005, and even larger numbers from evaluation forms since 2005. Few specific suggestions are repeated by more than twenty respondents. To help prioritize topics, the AIC Education and Training Committee developed a set of criteria. In selecting workshops for professional development, FAIC will aim to provide those that might closely fit several of the following criteria:

- Be accessible: offered in a way that includes members from all parts of the U.S., whether that be by offering scholarships, having offerings in multiple locations, and/or through distance learning technologies
- Be affordable, roughly \$150 per day (with an increase of no more than about 5% annually)
- Be led by recognized experts in the subject
- Be led by effective instructors
- Respond to identified needs of the membership
- Be based on the best research available
- Cut across Specialty Group interests when feasible
- Help advance the conservation profession
- Be aimed at mid-career practicing conservators (priority will be given to helping conservation professionals keep up to date with advances since their initial training.)

- Focus on hands-on training (when appropriate)
- Follow “best practices,” including AIC Code of Ethics, AIC Guidelines, and health and safety considerations
- Not be readily available elsewhere

The Education and Training Committee reviews proposed projects according to the above criteria, with input from Specialty Group representatives as appropriate.

### **B. Co-sponsorships**

Because of the wide variety of workshop needs and wide range of potential co-sponsors, flexibility is needed to work with organizations and facilities across the country. Relationships have been as simple as agreeing to publicize events, or have involved cost- and profit-sharing arrangements. In addition to partnering with outside organizations and institutions, similar agreements could be made with AIC Specialty Groups. Guidelines for these internal and external relationships are attached in Appendix II.

### **C. Length and Timing**

The length of workshops will obviously vary by the complexity of the topic. Responses in the 2006 membership survey averaged 2.9 days, but specific lengths varied from a half-day session to two-week programs. Due to cost considerations and the consequences of time away from work or private practice (these were listed as the primary reasons for not attending AIC Annual Meetings), programs ranging from ½ day to 5 days in length would be given priority over longer sessions.

In a 1993 survey, respondents indicated that winter, late summer, and October were the best months for education activities. When AIC Annual Meetings are held in April or early May, June will also be a good month for regional workshops. Because several instructors and host institutions are constricted by academic schedules, some FAIC workshops can only be held during summer.

### **D. Locations**

Forty percent of the AIC membership is concentrated in the Northeast. However, AIC has chosen to offer events in a number of locations. Workshops have been offered in 31 different states since 2002. Not surprisingly, workshops held in the areas where members are concentrated tend to get higher response rates. Scholarships are offered through FAIC to help offset travel and registration costs.

### **E. Marketing**

Marketing workshops and other events to the AIC membership is relatively straightforward. The AIC News, web site, emails to members, committees, annual meeting, and specialty groups provide ways to get the word out to the membership at basically no cost. Professional development opportunities are a strong incentive for joining an organization, and every effort should be made to publicize FAIC’s professional development activities to non-AIC members as well. Notices to related organizations and publications can be sent out at little cost. Although high-end print materials might be helpful in attracting memberships and grant support, they do not seem to be necessary to fill small-capacity workshops. However,



consideration should be given to creating print materials for events that can accommodate larger numbers of participants. Also, for larger events, reduced student rates should be considered to help fill auditoriums and help students afford to attend.

## **II. TIME LINE**

Current professional development activities will be continued. The FAIC Professional Development Scholarships and Workshop Development Grants, initiated in 2001, will continue to be awarded. These awards provide support for professional training opportunities in diverse topics and geographic regions. One-day and half-day workshops will continue to be offered in connection with AIC Annual Meetings. The following is a suggested time line for implementation of the various components of the professional development program.

### **2013**

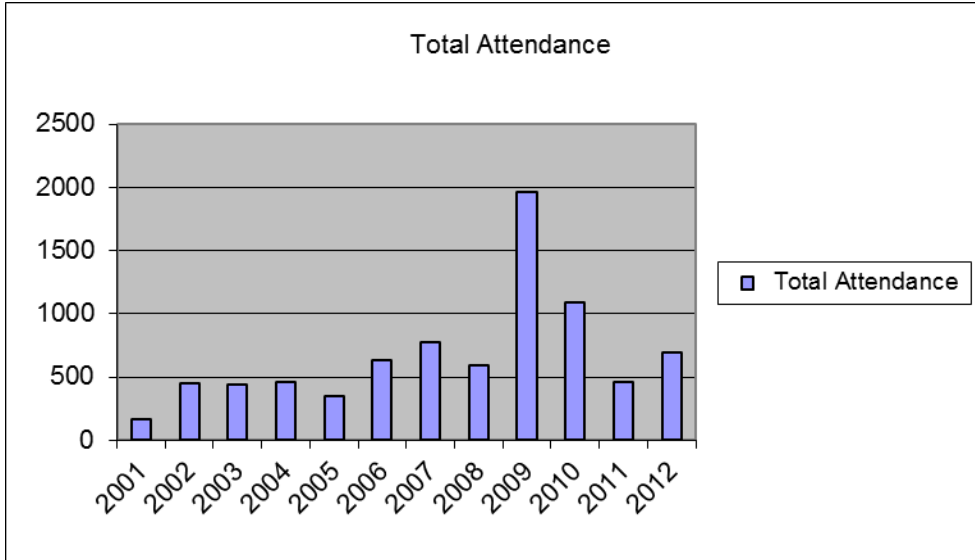
- Continue offering regional workshops
- Continue to move distance learning courses to new platform, updating and re-designing
- Continue NEH-funded workshops
- Continue Collaborative Workshops in Photograph Conservation
- Submit new NEH grant for 2014-2015 events
- Investigate NEA grant request for additional workshops on installation art (with EMG)
- Continue annual AIC-CERT continuing education sessions (IMLS grant)
- Continue workshops on disaster response at NTHP sites (IMLS grant)
- Submit new Getty grant for support of Latin America/Caribbean conservators attending AIC Meeting (2014, San Francisco)
- Develop plan for supporting instructor development
- Submit Kress grant for international speaker travel to Annual Meeting
- Review PD Strategic Plan

### **2014**

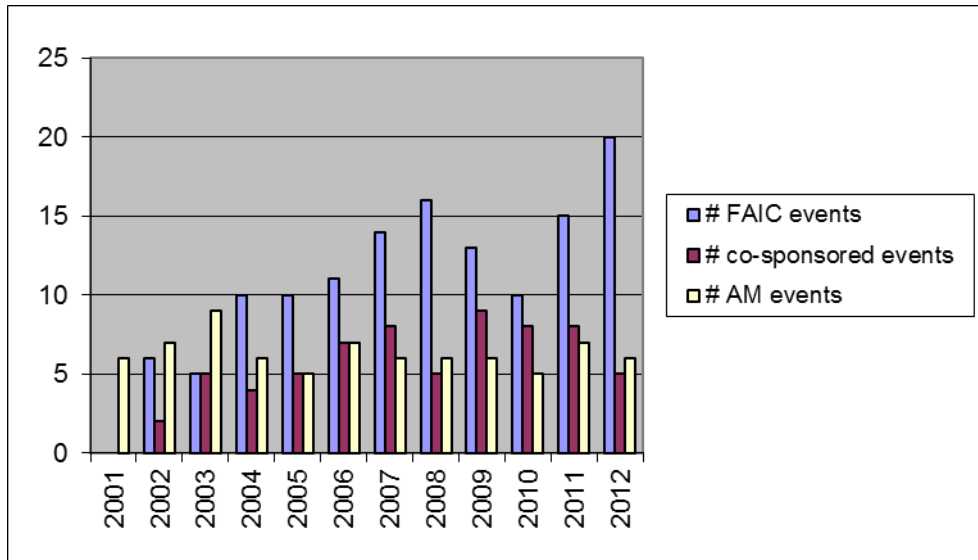
- Continue offering regional workshops
- Continue series of distance learning courses
- Continue Collaborative Workshops in Photographic Conservation
- Continue series of “TechFocus” installation art workshops (with EMG; possible NEA grant to submit)
- Initiate new series of NEH-funded workshops (if funded)
- Initiate on-line webinars on selected conservation topics
- Submit new Getty grant for support of Latin America/Caribbean conservators attending AIC Meeting (2015, Miami)
- Launch instructor development resources
- Submit Kress grant for international speaker travel to Annual Meeting
- Expand sponsorship for appropriate events
- Review, adjust, and extend the PD Strategic Plan.

## APPENDIX I History of FAIC Professional Development Events, 2002- 2012

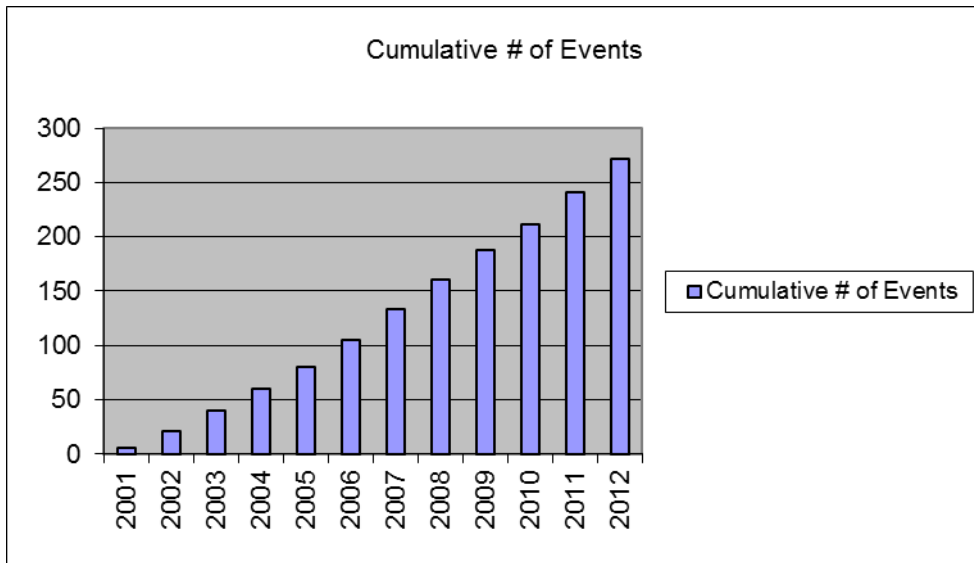
Annual Attendance at all FAIC/AIC Professional Development Events



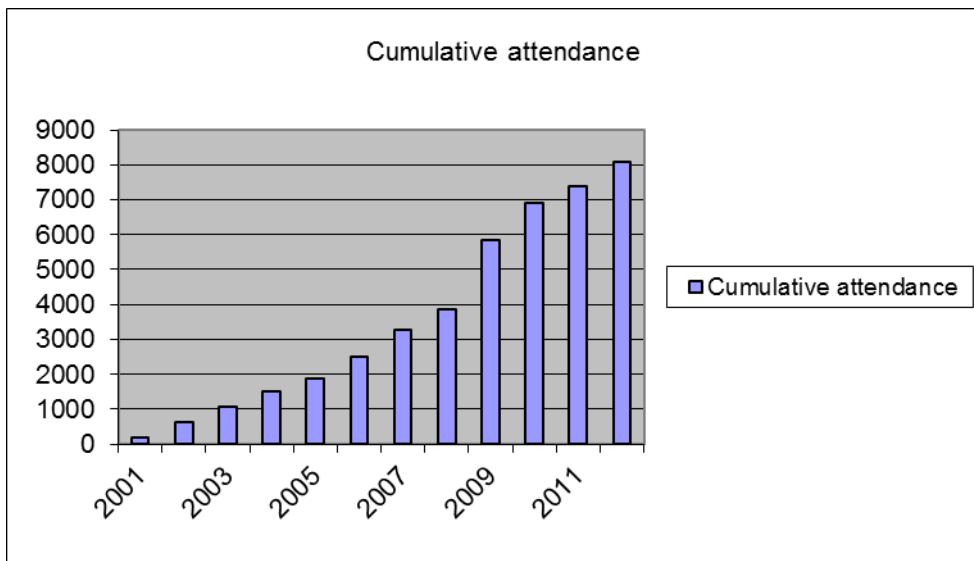
FAIC, Co-sponsored, and Annual Meeting Professional Development Events



Cumulative Numbers of All FAIC Professional Development Events



All FAIC Professional Development Events, Cumulative Attendance



## **APPENDIX II**

### **Guidelines for Co-Sponsorships**

As FAIC builds its professional development programming, co-sponsorship between FAIC and AIC Specialty Groups, and between Specialty Groups, FAIC, and external organizations can play an important role in achieving FAIC's professional development goals. The following guidelines describe the forms that co-sponsorship can take. Specialty Groups should keep the Board Liaison for Specialty Groups informed of workshop plans early in the process. Please contact the FAIC Institutional Advancement Director if you have further questions.

#### **DEFINITIONS:**

**It is important to understand the differences used in these guidelines between the terms “coordinate” and “sponsor.”**

*Coordinating* a workshop entails planning, organizing, and carrying out logistical tasks. Coordination between FAIC and Specialty Groups should be defined in advance by the Specialty Group Chair or his/her designee, and FAIC's Institutional Advancement Director (IAD). Any coordination between a Specialty Group and an external organization should first go through the IAD.

*Sponsorship* entails financial risk as well as potential financial gain. When sponsoring a workshop, the sponsor assumes responsibility for this potential financial loss or gain. For every workshop there is a “break-even” point that can be calculated by dividing the total cost for a workshop (minus any contributions, donations or expense reductions) by the number of registrants multiplied by the registration fee. The “break-even” point defines the minimum number of registrants needed to cover the direct expenses to put on the event. If fewer people register than the “break-even” point, there is a potential financial loss and the sponsor must decide whether to cancel or underwrite the loss. If more people register than the “break-even” point, there is financial gain for the sponsor. FAIC also incurs costs for staff time and overhead costs for each event, which need to be considered as well, in order to sustain the professional development program.

#### **FORMS OF COORDINATING AND/OR CO-SPONSORSHIP:**

Specialty Groups may coordinate and/or co-sponsor workshops with FAIC in one of the following ways:

- A. *Specialty Groups may coordinate a workshop without providing co-sponsorship.* In this scenario, the Specialty Group would not be responsible for any expenses, would not contribute any funds from its budget, and would not gain any profit should there be any. FAIC would be the sole sponsor of the workshop, assuming all financial risks and any potential profits, while the Specialty Group could still coordinate the event.

- B. *Specialty Groups may allocate a portion of their budget toward the costs of a workshop as a gift.* With this option the Specialty Group agrees not to accept any financial risk and therefore not receive any profit or loss should there be any. A Specialty Group might donate funds toward the costs of putting on a workshop to keep registration costs lower or to underwrite development of a topic that benefits their group in particular, but may not want to accept any further financial risk. For example, if the SG donated \$1000 and there were a profit, the Specialty Group would not receive any of the \$1000 back and all profits would go to FAIC. If there were a loss, the Specialty Group's \$1000 would still be paid out and FAIC would be solely responsible for paying the remaining losses.
- C. *FAIC may offer a one-time gift in support of a workshop sponsored by a Specialty Group.* In doing so, FAIC would not accept any financial risk and therefore not receive any profits or losses should there be any. This scenario is similar to the existing FAIC awards for workshop development but would be separate from the competitive grant process. Approval would be made by the FAIC Board and would most likely require ample advanced notice. The FAIC Institutional Advancement Director may be involved with some aspects of event coordination and marketing.
- D. *Specialty Groups may co-sponsor a workshop with FAIC.* In this scenario, FAIC and the Specialty Group would negotiate the formula for shared risk ahead of time. For example, if the split were 40% SG and 60% FAIC, the SG would assume 40% of the financial risk in producing the workshop. If there were a financial loss for the workshop, then 40% of the loss would come out of the Specialty Groups budget and 60% of the loss would come out of FAIC's budget. Conversely, if there were a financial gain from revenues, then the Specialty Group would receive 40% of the gain and FAIC would receive 60% of the gain. Any percentage can be negotiated between FAIC and the Specialty Group, so long as it is agreed upon in writing prior to agreeing to put on the workshop.
- E. *Specialty Groups may be the sole sponsors of a workshop.* In doing so the Specialty Group assumes full financial risk from its own budget. They would be responsible for all costs associated with the workshop and would benefit from all profits should there be any. If there were a financial loss, the Specialty Group would pay for the loss out of the Specialty Group budget. FAIC would not offer any financial support. The FAIC Institutional Advancement Director may still offer guidance and advice on coordinating the workshop and may assist with advertising the workshop to the general AIC membership.

### **Cancellation policy**

The decision on whether to cancel an event is made in accordance with FAIC's policy on cancellation. (See separate document.) In the event that an insufficient number of registrants determine that the event could result in a financial loss, the sponsor (not the coordinator) makes the decision of whether to cancel the event. When there is more than one sponsor for an event, both sponsors have agreed to sharing potential losses according to the previously

agreed upon fraction, and both must agree to a minimum number of registrants to enable the event to proceed. If the event is cancelled, the losses due to cancellation are split among the co-sponsors according to the agreed upon fraction of co-sponsorship.

Negotiations will be carried out between the Specialty Group Chair and FAIC's staff Institutional Advancement Director for each proposed event. The agreement is subject to approval by the FAIC Executive Director and FAIC board. Approval for the Specialty Group expenditures of funds and their associated risks would have to be in accordance with the Rules of Order relating to expenditures of that Specialty Group's funds. The extent of support from FAIC will depend upon the degree to which the proposed workshop meets the goals of the FAIC Strategic Plan for Professional Development and upon the availability of funds.

### **Specialty Group Co-sponsorship with External Organizations**

Co-sponsorship between Specialty Groups and external organizations (including regional guilds, regional centers, training programs, and external organizations such as the National Parks Service or the Campbell Center) must be accomplished through the FAIC Institutional Advancement Director. Agreements must be made in writing prior to FAIC accepting involvement in putting on an event and must be signed by the FAIC Executive Director.

### **FAIC Awards for Workshop Development**

External organizations may qualify for FAIC Workshop Development Awards.

Specialty Groups cannot qualify for FAIC Workshop Development Awards because the Foundation of AIC is not able to give awards to "itself" or one of its own supporting entities.

## **APPENDIX III**

### **FAIC Workshop Registration and Cancellation Information**

#### **PAYMENT**

Payment is required within 3 weeks of notification of acceptance into workshop. All payments must be in U.S. funds, by check, MasterCard, or VISA. Registrations and payments may be made on line, in person, by mail, or by fax. Registrations and/or payments cannot be accepted by phone.

#### **ENROLLMENT**

Enrollment is limited. Selection of participants will be made according to the criteria specified on the application form. Priority may be given to current AIC Professional Associate and Fellow members. Participants may be selected on the basis of order of receipt of registration, appropriate prior experience, and training. Selections may also be made to balance specialty areas, geography, institutional and private practice conservators, and to limit the number of participants from any single organization. In some cases, prerequisites may be indicated in the course description or requirements for enrollment.

#### **CANCELLATION OF WORKSHOP**

Workshops are subject to cancellation if minimum enrollment requirement is not met 30 days prior to the event. In such cases, FAIC will refund the full registration fee, but is not responsible for transportation, housing, loss of income, or other costs that may have been incurred by registrants.

#### **INCLEMENT WEATHER**

Weather-related or other emergency school closings in the community where the workshop is scheduled will cause an automatic cancellation of that workshop, unless the majority of participants and instructors are already on site. Every effort will be made to reschedule the event in the case of cancellation.

#### **REFUNDS**

Requests for refunds must be made in writing and received by the FAIC office at least 21 days prior to the workshop start date. Refund requests received by 42 days prior to the workshop start date are subject to a \$25 administrative fee. Refund requests received later than 42 days prior to the workshop start date are subject to a \$75 administrative fee. No refunds will be issued for cancellations received less than 21 days prior to the workshop start date.

#### **ACCOMMODATIONS FOR DISABILITIES**

We ask that anyone requiring Americans with Disabilities Act accommodations register his/her needs with FAIC at least 14 days before the date of the workshop.

#### **Please direct questions to:**

Eric Pourchot

Institutional Advancement Director

Foundation of the American Institute for Conservation of Historic & Artistic Works

1156 15<sup>th</sup> St., NW, Suite 320, Washington, DC 20005

202-661-8061; Fax: 202-452-9328

epourchot [at] conservation-us.org

<http://www.conservation-us.org>