



## Museums for America

Sample Application MA-30-19-0464-19  
Project Category: Collections Stewardship and Public Access

### Andrew Jackson's Hermitage

Amount awarded by IMLS:	\$36,766
Amount of cost share:	\$37,589

Attached are the following components excerpted from the original application.

- Abstract
- Narrative
- Schedule of Completion

Please note that the instructions for preparing applications for the FY2020 Museums for America grant program differ from those that guided the preparation of FY2019 applications. Be sure to use the instructions in the [FY2020 Notice of Funding Opportunity](#) for the grant program and project category to which you are applying.

## Abstract

The Andrew Jackson Foundation, the governing body for Andrew Jackson's Hermitage, seeks a Museums for America Grant of \$36766.00 to update its management policies, conservation plan, and strategic plans for collections and to produce a **Long-Range Collections and Conservation Plan**. The AJF (formerly called the Ladies' Hermitage Association, founded in 1889, has a forty-year history of conservation and management of collections. Many important conservation, environmental, and management activities have been accomplished. It is time to build on these previous successes and look at the next ten years of activities relating to collections. Several of these planned activities fall within the Goals of the Institutional Strategic Plan. This project meets the IMLS Agency Level Goal to **Increase Public Access** and falls with the Collections Stewardship and Public Access category, particularly planning for the management, care, and conservation of collections.

This comprehensive document, which we will call the **Long-Range Collections and Conservation Plan** will be developed after a review of all existing policies and documents (Long Range Conservation Plan, Collections Management Policies, Emergency Plan, and procedural guides). We will then contract with several conservators and collections management experts, as well as complete several staff led projects to gather information for this comprehensive Plan. Information gathered in compiling this plan will also provide the base information needed for a future Collections Storage Improvement project.

Shelley Paine, a Fellow of the American Institute for the Conservation of Historic and Artistic Works and Steven Weintraub of Art Preservation Services, an AIC Professional Associate will update the General Conservation Survey of Collections last conducted in 1987. Mr. Weintraub will focus especially on environmental issues. Harold Mailand, an AIC Fellow, will update the Detailed Conservation Survey of 87 items from the Textile Collection, which were last surveyed in 1981. This will be a pilot project for updating detailed surveys of other collection categories in the future. Dr. Jillian Galle and Bea Arendt of the DAACS project at Monticello, will provide guidance on current practices in the management of archaeological collections and records. Staff will inventory the Hermitage's collection of architectural fragments and assess and define the Ladies' Hermitage Association/Andrew Jackson Foundation archives.

These activities will inform the preparation of the Long-Range Collections and Conservation Plan which will be developed by Ashley Bouknight, Curator and Amy Williams, Chief of Museum Operations. Reports from these conservation surveys and collections reports will be included as appendices to the Plan. As new Detailed Conservation Surveys are completed they will be added to the Plan.

These projects will benefit The Hermitage's audiences by assuring the long-term preservation of collections, and insuring that these collections are available to visitors, researchers, and scholars for the future. Staff will benefit from having updated, clear guidelines and planning documents to assist in making collections decisions as well as assisting the Development Department in seeking fund for collections activities.

The intended results of this project are to update Collections Policies to include archaeological collections, Emergency Plans related to collections, and the Long-Range Conservation Plan. The Long-Range Collections and Conservation Plan will also include procedural guidelines and copies of Conservation Survey Reports. This information will also inform a future Collections storage expansion project. Successful adoption of these policies and procedures will ensure best practices for the care and management of collections and the long-term preservation of the Hermitage collections.

## **Project Justification**

### What Do We Propose to Do?

The Andrew Jackson Foundation, (until 2014 known as the Ladies' Hermitage Association) governing body for Andrew Jackson's Hermitage requests \$36,766.00 in funding for a Museums for America project with two collections-related goals. The first is preparation of an updated comprehensive **Long-Range Collections and Conservation Plan** that will incorporate updated management documents, conservation survey reports, and strategic plans for the collections. The second goal is to collect information that will lay the foundation for planning for future collections storage needs. The Hermitage, a presidential home and historic site has a 130-year history of collecting and a strong forty-year history of projects relating to care and conservation of its collections. Many foundational conservation projects have been completed and the activities proposed in this project will provide a new baseline for the next ten years of collections work.

During this project a conservator and environmental conservator will complete a General Conservation survey, including an environmental survey; a textile conservator will make a detailed survey of textiles; two archaeology collections management specialists will provide guidance for the future care and housing of the archaeology collection; and Hermitage staff will assess the size and scope of the institutional archives and inventory the architectural fragments collection.

The resulting reports and inventories will be used to prepare the Long-Range Collections and Conservation Plan which will include an updated long-range Conservation Plan; updates to the Collections Policies, Procedure Guidelines, and the collections portions of the Emergency Plan; new strategic plans for the management of the collections and archives; and a new Acquisitions Plan to guide future growth of these unique and important collections. These activities will also provide valuable information for the development of a plan for collections storage improvements, expansion, and equipment to take place in 2021.

These activities are interdependent and by doing them in one project, policy and planning documents will draw from the same updated information, bringing consistency across important guiding documents for the collection. Much of this same information is relevant to the upcoming project for collections storage. Furthermore, updating Collections documents and planning for storage are identified as important action steps in the institutional strategic plan.

### What Need will this Project Address?

The various collections related planning and policy documents need updating to incorporate new information and ideas in collections care and management. We will also incorporate three categories of collection materials that were not previously under the management of the Collections Department. These are architectural fragments which were only partially recognized as collections materials, archaeological objects and reports which were under the guidance of the Hermitage Archaeology Department, and the Andrew Jackson Foundation Archives.

For budgetary reasons, the Archaeology program was put on hiatus in 2009. Since that time a large portion of the collection has been at Monticello being cataloged under the protocols of the Digital Archaeological Archive of Comparative Slavery and funded by two NEH grants. That project is nearing completion, and those collections will be returning to The Hermitage. In addition, the archives and permanent records of the Andrew Jackson Foundation have not been assembled and managed as a whole. Architectural fragments are stored in several locations across the site. Planning for the best care and management of these three collections as well as all of the other collections needs to be incorporated into collections and conservation plans. Storage

of these collections when properly processed and housed will exceed current collections storage space, so the need for the upcoming storage planning.

In 1980, collections care and management activities began to align with professional best practices when the first conservation projects conducted by trained conservators were undertaken. A general conservation survey conducted in 1987 (See *Supportingdoc6*) led to a long-range conservation plan as well as detailed surveys in several collections areas. In 1989 the environmental systems in the Hermitage mansion were completely upgraded with interim upgrades as new technologies have become available. A complete interior restoration and re-interpretation of the Hermitage mansion which took place from 1989-1996 led to an increase in conservation activities. During this restoration, high priority objects from the detailed conservation surveys were treated: furniture, paintings, prints, gilded objects and frames, and wallpaper. The Foundation also constructed the Andrew Jackson Visitor Center that included a collections storage facility and exhibition spaces. The staff has implemented the use of the PastPerfect computerized cataloging system, including bar-coding, and taken important steps in the housing and intellectual control of portions of the archaeological collections. Many of these projects were funded by IMLS and NEH grants. See *Supportingdoc1* for a complete list of collections conservation and management projects accomplished since 1980.

All of these projects have greatly improved the care and management of the collections. Goals from previous Long-Range Conservation Plans have been completed. After forty years of successful projects it is time to step back, review our successes, and develop a new baseline from which to move forward with collections for the next ten years. The proposed activities in this request are our **highest collections priorities** and are identified as such in the Institutional Strategic Plan.

The collections have grown over time through gifts and purchases, but also due to archaeological projects conducted since 1975, natural growth of the LHA/AJF Archives, and the architectural fragments collections. The activities from this project will provide important information for the upcoming project to plan improvements to collections storage to meet the needs of the present collections and future acquisitions.

### Project Benefits

Andrew Jackson's Hermitage is owned and operated by the Andrew Jackson Foundation. Since the Foundation's establishment in 1889 the Hermitage collection has been focused on objects, manuscript, and printed materials original to President Andrew Jackson and his family. These collections provide a valuable resource not just for the interpretation of Andrew Jackson's home, The Hermitage, but for studying the United States in the first half of the nineteenth century.

The collection consists of materials relating to: Andrew Jackson's life, family, and career; the Hermitage mansion and farm; Mrs. Jackson's family, the Donelsons; Tulip Grove mansion and farm, home of Jackson's protégé Andrew Jackson Donelson; the Hermitage Presbyterian Church; the enslaved communities from both plantations; and the history of the Andrew Jackson Foundation. Collections fall into five categories: Objects; books, manuscripts and archival material; archaeological collections; historic buildings and structures; and landscape. This project addresses only the first three collection categories.

The collection contains over 3000 objects and works of art, 685 Jackson period documents, 1300 printed items, and over 3000 photographs. Approximately 800,000 artifacts have been excavated in archaeological projects since 1972. Collection highlights include 91 portraits of Andrew Jackson, his family and friends including 29 by his friend artist Ralph E. W. Earl; Jackson's own library of books, pamphlets and newspapers; and his personal possessions such as spectacles, canes, clothing, and watches. Nearly all of the Hermitage

mansion's furnishings are original to the house including six original 1836 wallpapers in situ. Much of the archaeological collection documents the enslaved experience at The Hermitage with ceramics, tools, buttons, marbles, coins, and bones. A collection of architectural fragments also has been assembled through a variety of building preservation and restoration projects. Please see *Supportingdoc2* for a detailed description of the collections.

This project will benefit The Hermitage's audiences by assuring the long-term preservation of collections, wise management, and planning for future care and growth. It will also ensure that these collections are available to visitors, researchers, and scholars for the future. Since much of the information collected for updating conservation and management plans duplicates that need for planning for the storage facilities, we can make wiser use of Hermitage resources by including the gathering of needed information about storage needs as part of this project. Staff will benefit from having updated, clear guidelines and planning documents to assist in making collections decisions. Information gained during this project will also assist our Development Department with fund-raising for collections activities. The most direct benefit will be to the collections themselves, ensuring thoughtful and strategic goals for the preservation of the collections.

#### How Will the Project Advance Our Institutional Strategic Plan?

The Andrew Jackson Foundation Strategic Plan currently in effect has a goal to *Ensure Sustainability* with the objective *Ensure that preservation of The Hermitage, its grounds, and its collections is done to the highest standards*. This project addresses several of the Action Items under this goal:

- Update Collections Management Policy.
- Submit an IMLS grant proposal for Conservation Survey to develop a new conservation plan.
- Update site wide emergency plan.
- Develop a plan for storage of the archaeological collection and plan for a storage facility with appropriate climate, security, and fire protection
- Plan Optimal Collections Storage/Assess collections storage needs and facilities

Please see the Strategicplan attachment for a fuller description of the Institutional Strategic Plan. A new institutional strategic plan is in the initial planning stages and these important collections objectives will remain in place and will take on even greater urgency.

#### How does the Project Address Goals of the Museums for America Program?

This project addresses the goals of the Museums for America Program by strengthening Andrew Jackson's Hermitage's ability to serve the public. By being **better stewards** of our collections, we can **increase public access** to the collections used to interpret many important aspects of early nineteenth century American history including the Presidency, Slavery, Agriculture, and Westward Expansion. The Hermitage collections address and relate not only to nineteenth century issues, but also problems facing the United States today: the role of the president, race relations, and the use of natural resources.

### **Project Work Plan**

#### What Specific Activities Will We Carry Out?

These are the activities planned for the project:

1. Object conservator will update the 1987 General Collections Survey to identify areas of collection care that require attention to achieve best practices.
2. Environmental conservator will evaluate environmental monitoring data and meet with local mechanical engineers and staff maintenance crew to assess the HVAC equipment and identify any areas that require upgrading or maintenance.

3. Textile conservator will update the 1981 detailed conservation survey of textile collections and share important information on improved storage.
4. Hermitage Staff will assess the LHA/AJF Archives.
5. Hermitage Staff will inventory the architectural fragments collection
6. Archaeological collections managers will advise staff on collections management and conservation for archaeology collections. The Curator will attend training sessions at the National Park Service's National Preservation Institute on archaeological collections conservation and management
7. Hermitage staff will develop individual collection plans for the three collection areas not addressed by previous plans: archaeology, architectural fragments, and the LHA/AJF Archives.
8. Curator will use the findings from this project to update the Long-range Conservation Plan, Collections Policies, and the Emergency Plan. We will also develop an Acquisitions Plan for development of the collections.
9. This information will inform the upcoming storage planning and the institution's site wide strategic plan.

The historic buildings and structures (The Hermitage Mansion, Tulip Grove and Hermitage Church) and historic landscape are actively assessed and plans for their care are updated regularly and thus are not part of this project. The New Orleans Charter developed in 1992 by the Association for Preservation Technology recognized that "historic structures and the contents placed within them deserve equal consideration in planning for their care" and the Andrew Jackson Foundation concurs with this conclusion. The Foundation has been working consistently with preservation architect Joseph Opperman of Winston-Salem, North Carolina on the preservation of the Hermitage mansion and other historic buildings. Mr. Opperman and the Hermitage preservation staff feel that planning for the preservation of historic architecture is satisfactory. We are likewise not including assessment of the interior environmental conditions of Tulip Grove Mansion and the Hermitage Church since they are not used for exhibition or storage of collections.

#### What is the Project's Maturity Level?

This is a Mainstreaming project. The Hermitage is building on a forty-year history of collections management, environmental control, and conservation projects to reassess collections and bring **all** collections areas to a similar high level of care and management.

#### Risks to the Project

The risks to the project lie primarily in the areas of coordination of activities and writing of the final plan. Several of the activities are sequential and so coordination of outside consultants will be critical to timely completion of activities. We have allotted extra time to manage scheduling difficulties. This will allow adequate time for receipt of reports and developing the policy and procedure updates to be based on these reports. Ashley Bouknight, Project Manager, and Amy Williams, Chief of Museum operations will meet twice a month review and update schedules.

#### Sequence of Project Activities

The first phase in this project will be to have a conservator, Shelley Paine, and an environmental conservator Steven Weintraub conduct a **general collections survey and environmental survey**. Ms. Paine will begin her assessment of the overall condition and conservation needs of the collections by reviewing the Collections Management Policies and the Emergency Plan. Mr. Weintraub will review and analyze the previous full year of datalogger reports for the Hermitage mansion interiors and the Andrew Jackson Center exhibition and storage spaces Both conservators will review the list of reports from previous conservation projects and environmental improvements. See *Supportingdoc1*. The two conservators will then spend time on-site meeting with staff and reviewing conditions. By having their surveys at the same time, they can coordinate

and share information. Mr. Weintraub will spend two days reviewing environmental data and assessing the heating, ventilation and air conditioning (HVAC) systems for the Andrew Jackson Center, Hermitage mansion, and outbuildings. He will consult with the engineers and Hermitage staff to create a report that identifies current conditions and makes recommendation for needed improvements. The objects conservator will spend three days on the general conservation survey reviewing the Hermitage mansion (14 rooms) storage (3500 sq. ft.) and exhibition spaces (3000 sq. ft.). Her final report will include a summary of current conditions and make recommendations for administrative documents, planning, storage, exhibition, security, pest control, maintenance and any needed staff training or additional conservation surveys or reports.

The second phase of the project addresses the needs of the textile collection. Textiles were the first collection to have a detailed conservation surveys almost forty years ago. Therefore, they are the first to be resurveyed. (See *Supportingdoc3* for list of textile objects to be surveyed.) Harold Mailand will spend six days on-site to examine textiles and three days to prepare condition reports and treatment proposals for 87 textiles. Only about half this number were surveyed in the 1981 detailed survey with thirty objects receiving conservation treatment based on that survey. The textiles to be surveyed in this project include new additions to the collection, as well as a group of furnishing textiles not previously surveyed. He will recommend improvements needed for textile storage.

Two activities related to the archaeological collections will take place in the third phase of the project. The Hermitage collections include approximately 800,000 archaeological artifacts and the associated field records. With the assistance of an IMLS grant and two NEH grants, the materials related to sites associated with the enslaved at The Hermitage, about half of the collection, have been cleaned, cataloged, numbered, and housed in appropriate containers. This cataloging has been conducted according the protocols developed by the Digital Archaeological Archive of Comparative Slavery headquartered at Monticello. The information about these collections is available through the DAACS website ([www.daacs.org](http://www.daacs.org).)

The remaining archaeological collections are in need of similar collections management. Hermitage Curator, **Ashley Bouknight, will attend two National Preservation Institute workshops** on archaeological collections conservation and management. Then we will contract with Dr. Jillian Galle and Bea Arendt from the DAACS project **to advise** on the specific needs for management of the Hermitage archaeology collections. The information from the training and consultation will be incorporated into updating collections policies for the archaeological collection. We will identify action steps needed in the long-range collections plan to improve the care and management of all of the archaeological collections so that the remainder has the same level of processing and care as the DAACS-cataloged collections. Conservation surveys for the archaeological collection, not part of this project, will be identified as important future activities in the long-range Conservation Plan

In the fourth activity the Hermitage's recently hired Chief of Museum Operations, Amy Williams, a trained archivist, will work with the Curator to **develop a plan for the LHA/AJF archives**. This phase will include identifying archival materials presently located in staff offices, records storage on site, and in collections to assess the total size of the archival collections and a plan for organizing, re-housing, and developing finding aids and records retention policies. The AJF, founded in 1889, is one of the oldest preservation organizations in the United States and the LHA/AJF archives are a valuable resource for studying both historic preservation and the role of women in historic preservation.

As the fifth activity for the project, the Collections Department and the Site Operations Department will **inventory architectural fragments** stored in multiple locations around the site. This will result in information on the size and general condition of these architectural fragments which have never been surveyed. This

information will not only give staff a better understanding of the objects to be considered for this collection, but their storage space needs as well.

Although preparation of a storage expansion and improvement plan is not part of this project, the information gathered will inform a plan to be developed in the next three years. Some collections, such as portions of the archaeology collection and the architectural fragments, are not housed in the climate-controlled and secure collections storage area. Further, a primary environmental /risk management concern is that collections storage has no fire suppression system since that was considered a best practice at the time the current space was constructed. Good storage is important for preventative conservation.

The information from each activity will be used to develop a **Long-Range Collections and Conservation Plan** which will include a **new strategic plan for care, conservation, and management of collections as well as an acquisitions plan for the development of the collections** to reflect current best practices. This document will consolidate all collections policies and planning into one reference and will provide a detailed guide for collections work for the next five years and general outlines for the five years following. See *Supportingdoc4* for an outline of this document. The activities planned for this grant project will be carried out from October 2019 to September 2020 (AJF fiscal years 2020-21).

#### Who will Carry Out Project?

The key participants in this project are:

##### **Hermitage Staff**

- Dr. Ashley Bouknight, Curator will serve as project manager. She will coordinate the scheduling and activities of conservators and collections consultants. She will assist Amy Williams in development of the plan for the LHA/AJF Archives. She will be the lead author of the final plan.
- Raechel Willis, Collections Aide, will facilitate conservator needs on site. She will also carry out the inventory of the architectural fragments.
- Amy Williams, Chief of Museum Operations, will lead in assessing the size and scope of the LHA/AJF Archive and serve as co-author of the final plan document.
- Brian A. Guzzi, VP for Site Operations, will facilitate work and provide information for the environmental conservator

##### **Contract conservators and consultants** (*see Supportingdoc5*)

- Shelley Paine, Objects Conservator in private practice will carry out the general conservation survey and consult with Mr. Weintraub.
- Steven Weintraub, Art Preservation Services will evaluate environmental conditions
- Harold Mailand, Textile Conservator will carry out a detailed survey of Textile Collections
- Dr. Jillian Galle and Bea Arendt will consult on care and management of archaeological collections

#### What Resources are Needed?

The primary product of this project will be reports and information to generate an updated strategic plan and policies for collections. We anticipate that only minimal supplies and no equipment will be needed. The primary resources needed are funding to hire consultants including conservators, and archaeological collections specialists as well as fund attendance at the NPI Archaeology collections seminars. Staff time will be needed to work with the conservators and consultants. Staff time will also be needed to carry out several of the inventory and assessment projects called for in the project. The final need will be for staff time to write the new Long-Range Collections and Conservation Plan, updating and preparing the several policy and planning documents that will be part of the Plan. Staff will also compile the data from these activities in a useable data set to assist with future storage improvements planning.



### How Will We Track Progress?

Progress will be tracked through the successful completion of each individual phase identified in the grant project verified in twice monthly meetings between Ms. Bouknight and Ms. Williams. They will make adjustments as needed. The development of a comprehensive **Long-Range Collections and Conservation Plan** which meets professional best practices and meets needs identified by Hermitage staff and conservator consultants will be the most important product of this project. The plan will be adopted by the Hermitage Board of Trustees to guide future collections work.

### Who Will See Results?

The Long-Range Collections and Conservation Plan will be an internal document for Andrew Jackson's Hermitage which will map out collections activities through FY 2031. Although they will not see the plan, researchers, visitors and other audiences will be the beneficiaries of the plan as The Hermitage provides more consistent and structured care and management of its collections.

## **Project Results**

### How will We Measure Success?

These policy updates and strategic plans will assure a thoughtful, well-planned approach to collections activities that will make the best use of available resources of staff and dollars as demonstrated by the preparation of the **Long-Range Collections and Conservation plan**. Success will ultimately show in preservation of collections which will assure future access to collections.

### How do the Results Address our Identified Need?

The Collections and Conservation plan directly addresses the issue of varying levels of care and management of collections by bringing planning for care, management, and development of all Hermitage collections to a uniformly high level and incorporating new best-practice procedures. These project activities directly address the identified need.

### How will Collections Care and Management Improve?

This project goes to the heart of improving the care and management of collections at The Hermitage. The completed planning document will provide goals and objectives for improved care and management of collections through preventative conservation and prioritization of conservation needs. By involving a wide range of staff within and outside of the collections department in development of the plan and by requiring adoption of the plan as Hermitage policy by the Board of Trustees, this plan will provide a unified approach to collections at Andrew Jackson's Hermitage.

### What are the Tangible Products?

The tangible products of this project will be reports from the conservators and collections management experts. These reports plus inventories conducted by staff of architectural fragments and LHA/AJF archives will provide the background information for the final tangible product: a comprehensive plan that addresses care, conservation, and development of all of the Hermitage collections. A second tangible product will be the data that guides a future project for expansion and improvements in collections storage.

### How will Project Benefits be Sustained?

The plan will allow The Hermitage to develop work plans, a focused plan for acquisitions, and uniform policies across all collections. Identification of projects to be carried out over the long term will allow The Hermitage to seek funds from a variety of sources to carry out the projects. Staff priorities and future needs will be identified well in advance.

