


## City of Alexandria, Virginia

## MEMORANDUM

DATE: JUNE 21, 2012

TO: THE HONORABLE MAYOR AND MEMBERS OF CITY COUNCIL

FROM: RASHAD M. YOUNG, CITY MANAGER 

SUBJECT: CONSIDERATION OF APPROVAL OF THE OFFICE OF HISTORIC ALEXANDRIA DEPARTMENTAL FIVE-YEAR STRATEGIC PLAN FY 2012-2016

---

**ISSUE:** Office of Historic Alexandria (OHA) accreditation.

**RECOMMENDATION:** That City Council:

- (1) Approve the Office of Historic Alexandria Departmental Five-Year Departmental Strategic Plan FY 2012-2016 as an element required by the American Association of Museums accreditation process.
- (2) Authorize the City Manager to execute all necessary documents that may be required.

**BACKGROUND:** The Office of Historic Alexandria over the last year has been seeking to have its entire museum system accredited by the American Association of Museums (AAM). Accreditation is a widely recognized seal of approval that brings national recognition to museums, regardless of their size or location. Since the first museums in the United States were accredited in 1971, the AAM Accreditation Program has recognized a museum's commitment to excellence, accountability, high professional standards, and continued institutional improvement. Out of over 17,500 museums in the United States, only about 4% are accredited. Of these, few are accredited as multi-museum systems. The accreditation process is aimed at having museums rigorously review their practices and standards to determine if they meet (or to change to meet) nationally recognized standards and best practices by the museum profession.

Three of the City museums have been twice accredited by the American Association of Museums. They are Gadsby's Tavern Museum; The Lyceum, Alexandria's History Museum; and Fort Ward Museum & Historic Site. The current OHA accreditation application, if approved, will provide accreditation to all Office of Historic Alexandria institutions as a "museum system" and expand accreditation to also include the

Alexandria Archaeology Museum, Alexandria Black History Museum, the Archives and Records Center, Friendship Firehouse Museum, and the Stabler-Leadbeater Apothecary Museum. If approved, the AAM honor of accreditation will be valid for fifteen years and Alexandria will be one of the few multi-museum systems in the United States to be accredited.

OHA submitted its accreditation application the AAM in July of 2011, and the accreditation team visited Alexandria in early June 2012. From the feedback received to date, the accreditation team was very impressed with the City, its museum system, and how well OHA's museums' practices and standards met or exceeded the AAM requirements. One technical requirement has not yet been met, however, and that is the adoption of the departmental level strategic plan by Council. It was not clear in the written AAM accreditation requirements that Council needed to adopt OHA's departmental-level Strategic Plan, as most museums which seek accreditation are not municipal departments, but stand-alone nonprofit institutions. As a result, in order to complete the AAM accreditation requirements and to likely become accredited, it is recommended that Council adopt OHA's Five-Year Departmental Strategic Plan for FY 2012 through FY 2016. This OHA Strategic Plan document which was developed in conjunction with the Historic Alexandria Historic Resources Commission will be reviewed by the four individual OHA-related commissions prior to Council's scheduled consideration of the OHA Strategic Plan on June 26.

The OHA Five-Year Departmental Strategic Plan FY 2012-2016 was created by OHA staff in FY 2011 and has been operational in FY 2012. This is a departmental operational plan, and does not represent a citywide master plan for history or for the OHA museums. It is largely an OHA departmental strategic plan that carries forward current policies and operations, and identifies areas for improvement or where OHA would aspire to obtain additional resources. It does not bind Council in regard to future financial funding of OHA, as that occurs during the annual budget process. The OHA Strategic Plan is consistent with Council's Adopted Strategic Plan.

The OHA Strategic Plan includes:

- An assessment of strengths, weaknesses, opportunities and threats
- OHA Strategic Goals
- OHA's Mission and Vision Statements, Education Philosophy, Departmental Core Values and Guiding Principles
- OHA's Code of Ethics (largely related to museum and collections administration)
- Excerpts from Council's Adopted Strategic Plan

The Strategic Goals are the core of the plan and are summarized below:

**Goal 1.0 To master the core functions of each activity within OHA.**

This includes the preservation of historic buildings, sites, and facilities; and an ongoing commitment to care and management of all City-owned museum and archival collections; and maintaining professional standards and best practices associated with an accredited museum system and the museum profession, and

meeting all administrative and legal mandates required for its activities by the City of Alexandria and/or Commonwealth of Virginia.

**Goal 2.0 To directly align the OHA Five-Year Departmental Strategic Plan FY 2012-2016 with the Alexandria City Council FY 2004-2015 Strategic Plan.**

This includes the celebrate of diversity objectives within the City Council plan; and expansion of outreach and Americans with Disabilities Act services to reach out to additional or under-served audiences; and enhancement, preservation and development planning initiatives of the City.

**Goal 3.0 To foster a skilled and knowledgeable staff and corps of volunteers within OHA.**

This includes maintaining and recruiting the best possible candidates for open staff positions; and recruitment of additional of volunteer support; and maintenance and expansion of staff development opportunities.

**Goal 4.0 To maintain the highest possible professional standards and implement the best practices and tools associated with the profession to accomplish each function.**

This includes the maintenance and expansion of partnerships; and pursuit of best marketing strategies; and incorporation of new technologies into programs and services.

**Goal 5.0 To align our organization, programs and practices to meet the lifelong learning needs of all customers.**

This includes maintenance and expansion of historic research services; and enhancement of educational and lifelong learning opportunities; and promotion of the interpretation of local, regional, state and American history.

**Goal 6.0 To support and maintain civic culture, ongoing planning initiatives, special projects and economic sustainability within the City of Alexandria.**

This includes the increase of fundraising and development opportunities; and enhancement of intermodal transportation opportunities; and development and maintenance of Special Project Initiatives.

The AAM requirements are that museum strategic plans be updated annually. Since OHA has been operating under their departmental plan during FY 2012 (which is nearly finished), OHA will soon be undertaking an update to the attached strategic plan. Where needed, it will be amended for the FY 2013 year to reflect Council's FY 2013 budget decisions which have already been made.

**FISCAL IMPACT:** The OHA departmental strategic plan, while aspiring to additional operational resources, does not bind the City to provide those additional resources. Rather, during each budget process, OHA's resource needs would compete with other City departments within the fiscal parameters set by Council for funding. In regard to capital funding, based on known capital needs to date, the City's 10-year Capital Improvement Program (CIP) contemplates the funding levels of about \$345,000 per year outlined in the OHA departmental Strategic Plan. However, given the age and historic nature of the City's museums, capital needs are not as predictable as are newer buildings.

The OHA CIP funding is also subject to the City's annual budget decision-making processes.

**ATTACHMENTS:**

Attachment I: Office of Historic Alexandria Five-Year Strategic Plan

Attachment II: Office of Historic Alexandria Code of Ethics

Attachment III: City Council Goals

**STAFF:**

Mark Jinks, Deputy City Manager

Lance Mallamo, Director, Office of Historic Alexandria

Gretchen Bulova, Director, Gadsby's Tavern Museum and Stabler-Leadbeater  
Apothecary Museum

Jackie Cohan, City Archivist, Archives and Records Center

Pamela Cressey, City Archaeologist

Susan Cumbey, Director, Fort Ward Museum & Historic Site

Louis Hicks, Director, Alexandria Black History Museum

James Mackay, Director, The Lyceum, Alexandria's History Museum



*Office of Historic Alexandria*

*Office of Historic Alexandria  
Departmental  
Five-Year Strategic Plan  
FY 2012-2016*



## TABLE OF CONTENTS

	Page
Introduction	3
Internal Strengths, Weaknesses, Opportunities and Threats	8
Office of Historic Alexandria (OHA) Five-Year Departmental Strategic Plan Mission, Vision, Educational Philosophy, Core Values	10
OHA Guiding Principles	11
OHA Strategic Goals	12
Evaluation and Measurement	29
List of Initiatives & Tasks Aligned with Strategic Goals, Objectives, Implementation Schedule, Performance Measures, and Assignment of Responsibility	30
Attachments	
(A) OHA Code of Ethics	
(B) Adopted City Council Goals and OHA Elements of the City's Strategic Plan	

## **The Office of Historic Alexandria Five-Year Departmental Strategic Plan FY 2012-2016**

### ***INTRODUCTION***

The Office of Historic Alexandria (OHA), a municipal department within the government of the City of Alexandria, consists of the administrative unit and the following eight institutions: Alexandria Archaeology, Alexandria Black History Museum, Archives and Records Management, Fort Ward Museum and Historic Site, Friendship Firehouse, Gadsby's Tavern Museum, The Lyceum, and the Stabler-Leadbeater Apothecary Museum. The City Council, elected by the citizens, forms the trustee body and acts as the governing authority. All staff report through the director (department head) to the City Manager, who has been authorized by City Council to implement City policy and to perform certain functions of the government.

The role of OHA is that of responsible stewardship of resources held in the public trust for the historic City. This responsibility includes the preservation of historic sites, archaeological sites, artifacts and records, and the use of these resources in accordance with professional practices and standards of scholarship. These resources are an irreplaceable component of Alexandria's past and serve to maintain the City's quality of life, culture and sustainability.

The goal of the administrative unit and eight institutions that comprise OHA is to enhance the quality of Alexandria's urban environment for its residents by building a sense of community identity and continuity; by developing a sense of civic culture and pride in the community; by maintaining the City owned and operated museum system; by acquiring, protecting and preserving historic buildings, archaeological and historic sites, archives, records, collections and artifacts significant to the heritage of the City; by preserving and interpreting the historic cultural diversity of the City; and by supporting artistic expression. These significant contributions promote the City's national and international reputation. People and businesses are drawn to Alexandria as an attractive and vibrant location in which to live, work, and play.

### ***WHERE HAVE WE COME FROM?***

#### **Results of Previous OHA Strategic Plan**

During the period of time covering the previous OHA Five-Year Strategic Plan, the following objectives were met:

1. Collaboration between OHA and other heritage attractions in the City of Alexandria sites has increased through monthly meetings of the Historic Alexandria Resources Commission, and quarterly coordination of the Historic Alexandria Museum Gala and

Alexandria Forum events and planning for the Civil War Sesquicentennial.

2. Coordination of a calendar of events listing through the Alexandria Convention and Visitors Association and replacing the 300-copy printing of the weekly newsletter, *This Week in Historic Alexandria*, with an electronic version reaching over 2,400 subscribers by 2011.
3. Coordination of website participation by all Alexandria history attractions and museums open to the public on a regular basis, as well as a new and expanded departmental website for the Office of Historic Alexandria that can be updated quickly.
4. Partnership with Alexandria public schools to develop coordinated educational offerings, such as a teacher-in-service program.
5. Development of coordinated interpretive theme for all sites, "Forming a more perfect community."
6. Reorganization of Office of Historic Alexandria administration staff to provide increased marketing efforts.
7. Tours, geo-caches, cell phone tours and I-phone apps prepared on significant buildings and themes of the historic City.
8. Reorganization and expansion of departmental website.

## ***WHERE ARE WE NOW?***

### **Citizenship and Civic Culture**

In addition to day-to-day public history operational duties and public programs, OHA also acts to promote and develop tourism initiatives, public history resources, and assists other City departments with inter-departmental planning and review, as well as providing staff support to the Alexandria Archaeological Commission, Alexandria Historical Restoration and Preservation Commission, Historic Alexandria Resources Commission, Public Records Advisory Commission, and the Fort Ward Ad Hoc Park and Museum Area Stakeholder Advisory Group. Through these efforts OHA seeks to develop a sense of citizenship with residents of the community through its programs and outreach activities to schools and community organizations. This adds enormous value in the development of a civic culture that connects both long- and short-term residents with their place in the social structure and history of the community.



## **Key Customers**

OHA's key customers and stakeholders include:

- Residents, tourists and incidental visitors ;
- local businesses including, but not limited to, hotels, restaurants, realtors, banks, non-profit agencies;
- community groups, including Act for Alexandria, Alexandria Scholarship Fund, Senior Services of Alexandria, Alexandria Historical Society, Historic Alexandria Foundation, United Daughters of the Confederacy;
- heritage attractions not owned and operated by the City of Alexandria, including the Lee-Fendall House Museum and Gardens, Carlyle House Historic Park, Freedom House Museum, George Washington Masonic National Memorial;
- local, regional and state government agencies, including the Counties of Arlington, Fairfax, Loudon, and Prince William, Virginia, Northern Virginia Regional Park Authority, Northern Virginia Regional Commission, Virginia Department of Historic Resources, Virginia Department of Transportation, National Park Service, Federal Highway Administration;
- agencies and departments within the City of Alexandria government including the City Manager's Office, Alexandria City Public Schools, Depts. of Community Resources, Communication and Information, Fire, Housing, Library, Planning and Zoning, Police, Recreation, Parks and Cultural Activities, Transportation and Environmental Services;
- City Boards, Commissions and Stakeholder Advisory Groups, and Task Forces established by the Alexandria City Council, including the Alexandria Commission on Persons with Disabilities, Alexandria Convention and Visitors Association Board of Governors, Alexandria Archaeological Commission, Alexandria Historical Restoration and Preservation Commission, Historic Alexandria Resources Commission, Public Records Advisory Commission, Waterfront Commission, Fort Ward Park and Museum Area Ad Hoc Stakeholders Advisory Group, Fort Ward History Work Group, Woodrow Wilson Bridge Task Force, Freedmen's Cemetery Steering Committee, City Naming Committee, Marketing Coordinating Council;

- public/private City agencies such as the Alexandria Chamber of Commerce, Alexandria Convention and Visitors Association, Alexandria Economic Development Partnership, Alexandria Small Business Development Center;
- Other private schools and educational facilities including, but not limited to, Alexandria Country Day School, Episcopal High School, Bishop Ireton High School, St. Mary's School, St. Rita's School, Saints Stephens and Agnes School, McLean Public Schools' Project Enlightenment Program.

### **Ownership**

There has traditionally been a strong sense of citizen ownership and cohesion in Alexandria, and residents are generally engaged and active in the affairs of the community. Despite a high proportion of transient residents that move in and out of the community (20% population turnover with a two-year period) due to its proximity to nearby Washington, D.C., the special character and nature of the place also encourages long-term residency and a high level of citizen participation. New residents are often surprised at the large number of lifetime residents who still live in the community, as well as descendants of past generations of Alexandrians. Together, this partnership supports a future for the City that recognizes inevitable urban development based on public need and appropriateness, but one that includes historical reference and unusual public amenities.

### **Products and Services**

OHA is the comprehensive public history agency for the City of Alexandria and provides multiple services relating to archival management, archaeology, cultural resource management, heritage interpretation, historic preservation, the humanities, museology, oral history and public records. OHA operates its administrative unit at Lloyd House, and is comprised of seven separate and distinct museum and historic site locations, the City Archives and Records Center, and serves more than 150,000 residents and over 2,000,000 potential visitors to the City annually. OHA's institutions provide educational and interpretive activities for lifelong learners through a wide variety of children's and adult learning experiences including school and public programs, exhibits, and special event opportunities. Although many of its facilities, services and programs are discretionary, OHA also maintains requirements of two activity functions mandated by state or local law: the administration of the City of Alexandria Archaeological Code, and the preservation or destruction of public records as established by the Commonwealth of Virginia. OHA is also responsible for providing comments to the Old and Historic Alexandria District and Parker Gray Historic District Boards of Architectural Review, and maintaining the historic preservation and open space easement program within City boundaries. OHA also manages extensive collections of artifacts, documents, period furnishings, fine and decorative arts in trust for current and future generations at both site-specific and centralized locations.

## **Significance**

Although Alexandria was founded in 1749 by the colonial government of Virginia, the City's strategic location on the eastern seaboard and access to fertile lands and abundant waters has made it a significant place of human habitat for thousands of years. The oldest artifact associated with human activity in the area, a broken Clovis Point discovered in 2007, dates settlement of the area to 13,000 years. The geographic location along the Potomac River connected early Indian settlements by the river and via a north-south trail that extended in segments along the east coast, much like the roadway corridors that became Route 1 and Interstate 95 traverse the City today. This prominent and central location was crucial to Native Americans and in the development of European settlement patterns in the American colonies. Specific periods and themes relating to Alexandria's significance are as follows:

- American Indian Heritage – 13,000 B.P. (Before Present) –1608
- Exploration & Early Settlement – 1608–1731
- Tobacco Port – 1732–1749
- Development & Early Growth – 1749–1770
- American Revolution/Birth of the Nation – 1771–1814
- International Port – 1815–Civil War
- Secession & Civil War – 1861–1865
- Reconstruction & Expansion of African American Neighborhoods – 1865–1890
- Early 20<sup>th</sup>-Century Industrialization & Processing – 1891–1929
- Early Historic Preservation & Tourism – 1930–1940
- Center for National Defense – 1940–1950
- Bedroom Suburb/Urban Renewal/Modern Historic Preservation – 1950–1985
- Regional Urban Center – 1985 – Present

**Stewardship**

The proper management of resources is an essential component of the ethical responsibility that OHA seeks to maintain. OHA recognizes that the protection, conservation and preservation of the City's irreplaceable historical treasures are its paramount duty, and one of primary importance to the City of Alexandria. OHA acts as the proper steward to protect and preserve the City's historical resources on behalf of all current and future Alexandrians.

***WHERE DO WE WANT BE?*****Internal Strengths, Weaknesses, Opportunities and Threats**

One of OHA's chief goals is to align its mission with the needs of the increasing diverse population of the City of Alexandria, and the two million visitors who travel to the city each year. Noted for its historic and architectural significance, and recognized for its contemporary charm and strategic location, Alexandria has evolved over the past half century from a sleepy suburb of Washington, D.C. to a bustling city comprised of a series of urban villages.

Although one of the most densely populated cities in the United States, each Alexandria neighborhood maintains its own distinctive character, and all are bound together by a very high sense of civic pride and community spirit. A SWOT analysis of OHA identified a series of issues as follows::

<b>Strengths</b>	<b>Weaknesses</b>	<b>Opportunities</b>	<b>Threats</b>
Quality Employees	Difficulty to Recruit quality candidates	Excellent retention, ability to reach larger pool of applicants	High cost of living in NOVA, traffic, commuting costs
Strong Leadership/CMO/ City Council	Competing priorities of City needs	Integration of history into City initiatives and special projects	Reduction in resources due to competing priorities, mandates
Focus on Performance Measures	Elimination of necessary activity based solely on quantitative results	Increase in resources based on comprehensive evaluation of results	Inaccurate or ineffective survey/ measurements
Financial Resources- City	Budget reductions in two previous years	City tax revenues increasing after impact of recession	Long term reductions due to decreases in discretionary spending
Financial Resources- Private	Inability to pursue all opportunities with existing staff	Addition of dedicated development staff possible in future	Ongoing reduction of individual, foundation and corporate support possible due to tax code reform
Financial Resources- Other Government	Inability to pursue all opportunities with existing staff	Additional of dedicated development staff possible	Permanent reduction of state and federal grants projected as gov't. agencies retract
Excellent internal and external research resources	Lack of dedicated research staff, time for existing staff	Integration of new research into ongoing initiatives	Prioritization of activities impacting maintenance & Research
Condition of OHA Facilities/CFMP Historic Preservation Funding	Insufficient building maintenance funding in operating budget, ADA issues at sites	Development of grants to supplement City maintenance, historic preservation and accessibility	Future reductions in operating budget for maintenance and accessibility due to competing priorities.
Adhere to highest Standards & Best Practices	Ongoing staff shortages may result in decline of standards & best practices	City tax revenues increasing after impact of recession, allowing staff recruitment	Long term reductions due to decreases in discretionary spending may reduce staff
Dedicated, diverse and highly educated volunteers	Inability to train and provide proper supervision to increasing numbers of volunteers	Ability to attract, recognize and maintain quality volunteers	Impact on young people and retirees of high regional cost of living discourages residency

## ***HOW DO WE GET WHERE WE WANT TO BE?***

### **The Office of Historic Alexandria Five-Year Departmental Strategic Plan 2012-2016**

Strategic planning was initiated to determine community needs, set meaningful and measurable goals, and to define the future course of action desired by citizens and visitors, volunteers, City Council, Boards and Commissions, Stakeholder Advisory Groups, History Work Groups, local historical and cultural organizations, and OHA staff.

OHA's Plan is based on input from community representatives as well as data from surveys of guests, members, "Friends" groups, Boards and Commissions, Stakeholder Advisory Groups and educators. The plan establishes an overarching strategic goal of community ownership and engagement. To reinforce that strategy, OHA has revised or created new mission, vision and educational philosophy statements, defined our core values, established guiding principles, defined six supporting strategic goals and eighteen objectives for the department. The plan also establishes measurable outcomes in support of our commitment to be a community-based, community-relevant and community-centered organization.

**OHA Departmental Mission Statement** - *The Office of Historic Alexandria (OHA) enhances the quality of life for City residents and visitors by preserving and interpreting Alexandria's historic properties, archaeological sites, cultural resources, artifact collections, objects, archives, records, and personal stories, and by encouraging audiences to appreciate Alexandria's diverse historic heritage and its place within the broader context of American history.*

**OHA Departmental Vision Statement** - *to be the leader in authentic, engaging, and imaginative history learning experiences for all who live in or visit the City of Alexandria, Virginia.*

**OHA Education Philosophy Statement** - *OHA's departments of education work to integrate research, discovery, public outreach, and educational opportunities. Education and outreach include hands-on experience, tours, role playing, and school programs, using specific and appropriate primary resources. The intent is to engage citizens, students, and visitors of all ages in the adventure that is American history.*

**OHA Departmental Core Values** - *Our Core Values define the values of our department, institutions, and people. These are the values by which we treat others, wish to be treated individually and the values we promise to embrace.*

**CREATIVITY-** Our work products and programs are original, expressive and imaginative

COLLABORATION- We work together in a joint intellectual effort and are mutually supportive

EXCELLENCE- We strive to excel and demonstrate quality and superiority in our programs

FAIRNESS- Our actions demonstrate consistency and transparency

FLEXIBLE- We operate within established guidelines to reach the best possible outcome

INTEGRITY- We adhere to the highest standards of our profession

PRACTICAL- We determine solutions that are cost effective, accurate and equitable

STRATEGIC- We preserve and promote the past, to position the City of Alexandria for a better future

**OHA Guiding Principles –**

OHA’s Guiding Principles mirror those established by the City of Alexandria in 2010:

ETHICAL BEHAVIOR – We act ethically by putting the public interest first, communicating openly, and consistently demonstrating professional integrity.

INNOVATION – We are not satisfied with the *status quo*; we value creativity and well-considered risk-taking as means to achieve organizational success.

LEADERSHIP – We have the courage and energy to step outside the existing culture, to start evolutionary, meaningful and sustainable change by creating new realities and moving people to purposeful action in order to overcome political, bureaucratic and resource barriers.

PROFESSIONALISM – We are capable, lifelong learners, who model the competencies associated with our field, specialty or area of expertise.

RESPECT – We will avoid drama by exhibiting civility, empathy and restraint.

RESPONSIBILITY – We are accountable, take ownership, and are receptive to feedback, whether favorable or unfavorable, in everything we do.

TEAMWORK – We work cooperatively in a collegial and supportive manner to meet common goals.

Grouped by content and delivery, our guiding principles provide the framework and boundaries for the OHA administration, institutions and related educational experiences. These experiences will involve archaeology, history or pre-history, historic preservation, public records or archival preservation. The result will be an authentic, creative and

imaginative environment for lifelong learning experiences, delivered in an aesthetically pleasing manner.

With City Council support, OHA pledges to maintain the City-owned and operated museum system, the Archives and Records Center, and deliver informal educational experiences designed to promote lifelong learning for diverse and multi-cultural audiences. It is OHA's intent to increase historic knowledge; to enhance public interest and learning in archaeology, history, historic places and sites, historic preservation and restoration, cultural resource management, public and social history, public records and archives; and to create a scholarly and engaging learning forum.

In June 2011 City Council adopted the OHA departmental Code of Ethics for all who work for, or on behalf of OHA (see Attachment A).

### **OHA Strategic Goals**

---

- 1.0 To master the core functions of each activity within OHA.**
- 2.0 To directly align the OHA Five-Year Departmental Strategic Plan with the Alexandria City Council 2004-2015 Strategic Plan. (See Attachment B)**
- 3.0 To foster a skilled and knowledgeable staff and corps of volunteers within OHA.**
- 4.0 To maintain the highest possible professional standards and implement the best practices and tools associated with the profession to accomplish each function.**
- 5.0 To align our organization, programs and practices to meet the lifelong learning needs of all customers.**
- 6.0 To support and maintain civic culture, ongoing planning initiatives, special projects and economic sustainability within the City of Alexandria.**

### **OHA Objectives Associated with Each Goal**

---

**Goal 1.0 To master the core functions of each activity within OHA.**

**Objective 1.1 Preservation of Buildings & Sites**

To achieve the highest possible standard of preservation and maintenance for OHA facilities.



OHA clearly recognizes that routine maintenance is one of the highest levels of historic preservation. As such, the department seeks to maintain historic building fabric and infrastructure at OHA facilities through its annual operating budget, rather than defer maintenance and replace original building materials at a later time through a capital appropriation. However, the department also applauds the actions of the Alexandria City Manager, Mayor and City Council to maintain an ongoing annual capital budget for OHA projects to maintain and restore facilities that require major attention.

Working with the Department of General Services (GS), OHA has developed a list of departmental Capital Improvement Projects (CIP) to be implemented within the timeframe established by this plan. This list that follows will be reviewed and updated annually to adjust to changing realities, threats or opportunities that advance the preservation of Alexandria's historic resources during the five-year period covered by this plan. These projects are planned for OHA facilities through the Capital Facilities Maintenance Program (CFMP) funding in the City's approved Capital Improvement Program (CIP). As a result, this level of funding can likely be sustained by the projected City CIP. A list of CIP projects projected during the period of the plan can be found on the following page:

<b>OHA CIP FY12 BUDGET - (Projections FY12-FY16) 1</b>					
OHA CFMP	FY2012	FY2013	FY2014	FY2015	FY2016
<i>Gadsby's Tavern Museum</i>	\$20,000 Lighting Study		\$43,000 Exterior Repairs	\$250,000 elevator	
		\$55,000 Brick Point-up			
<i>Gadsby's Tavern Rest.</i>					
<i>Archaeology</i>				\$13,000 Interior Repairs	\$45,000 Interior Paint
<i>Archives</i>	\$15,000 Shelving				\$80,000 Planning & Design
<i>Apothecary</i>				\$5,000 windows	
<i>Lyceum</i>	\$25,000 Painting	\$110,000 Roof Repairs, HVAC \$145,000			\$160,000 South Entry Portico
	\$23,000 Roof Repairs				\$30,000 Interior Paint
<i>Ft. Ward Museum</i>	\$80,000 Replc/Rpr Revtmnts, ADA Walkway	\$24,000 Museum Interior Paint	\$150,000- Museum Addition office upgrades	\$75,000 ADA Walkway-Fort	
	\$12,000 Soil Erosion Control		\$7,000 Soil Erosion	\$7,000 Soil Erosion	\$7,000 Soil Erosion
	\$15,000 Ramp				
<i>Lloyd House</i>	\$20,000 Cornice repair		\$45,000 Flooring repairs		\$20,000 Exterior Painting
	\$85,000 Brick Patio Repairs				\$3,000 Well roofing
	\$25,000 Int Floor Repairs				
<i>Friendship FH</i>	\$20,000 Interior paint		\$55,000 Exterior Paint		
<i>Black History</i>	\$5,000 Interior Painting	\$11,000 Exterior Paint	\$45,000 Exterior Repairs		
<b>TOTALS:</b>	<b>\$345,000</b>	<b>\$345,000</b>	<b>\$345,000</b>	<b>\$345,000</b>	<b>\$345,000</b>

1. Represent planning level estimates that will need to be refined and adjusted.

### **Objective 1.2 Commitment to Collections Care and Management**

To achieve and maintain the highest quality standard for collections care and management.

OHA is the steward of extensive collections of artifacts, documents, fine and decorative arts relative to Alexandria's heritage. In addition to its ongoing responsibilities to protect and preserve these resources for future generations, the department must evaluate the future needs of the collections and the people who learn from them. Currently, document storage at the Archives and Records Center on S. Payne Street, as well as the museum storage and Collections facilities within the same building, are rapidly reaching capacity. OHA anticipates that interim improvements, such as installation of high density shelving, can extend the capacity of the building within the timeframe of this strategic plan, but that planning for new document and/or collections storage must begin within the next Five-Years. OHA is currently digitizing certain collection files for eventual inclusion on the departmental website, and the department intends to continue digitization projects in the coming years. The department also is committed to acquiring new and meaningful additions to the City's history collections, and to the implementation of selected conservation projects associated with select items from each site's collections.

### **Objective 1.3 Maintain Administrative and Legal Mandates**

To maintain the highest standards of administration, ethics, and legally mandated requirements.

OHA will maintain all administrative, ethical and legal obligations during the period of this plan. Strong administrative policies are in place, and best practices are routinely incorporated into departmental operations. A departmental Code of Ethics was approved by City Council in June 2011. Two activities of the department are mandated: archiving and disposing of Public Records as per State law, and administration of the Archaeological Code of the City of Alexandria. OHA will also continue to perform reviews and provide recommendations for the City's Boards of Architectural Review, and administer the architectural and open space easement program of the Alexandria Historical Restoration and Preservation Commission (AHRPC). OHA will also work with AHRPC to secure new easements during this time period to further protect the historic resources of the City. The department will also function as the liaison to the Historic Alexandria Resources Commission, Alexandria Archaeological Commission, and Public Records Advisory Commission. As part of the Alexandria Historic Preservation Management Plan initiative, OHA will also explore new legal strategies and programs to enhance preservation in the City, such as the utilization of historic preservation tax credits for private property owners.

OHA will continue to prepare annual budget requests to the City for its facilities, and request additional funding when appropriate to replace staff lost during the recent recession, new staff

necessary to generate additional programming and revenues, and non-personnel costs associated with increased service delivery. The department will also request an increase in the City's base budget to further fund annual operations at the Stabler-Leadbeater Apothecary Museum. Although the Apothecary has received only partial funding since its acquisition by the City in 2006, the department has been able to maintain a full level of services primary by supplementing general fund expenses with donations.

During the time period covered by this plan, OHA will also make safety issues a major priority of the department. In addition to City safety regulations, the OHA Director has recently appointed a departmental Safety Committee to coordinate safety issues among facilities and to annually review and recommend updates to the disaster plans for each facility.

**Goal 2.0 To directly align the OHA Five-Year 2012-2016 Strategic Plan with the Alexandria City Council 2004-2015 Strategic Plan. (See Attachment B)**

**Objective 2.1 Celebrate Diversity**

To attract a more diversified and multi-cultural audience to Alexandria's historic sites and cultural events, and to create programs targeted to new immigrants to the City of Alexandria. To develop new museum exhibits/programs to serve Alexandria's newest and increasingly diverse immigrant populations, and expand the base of historical knowledge of all Alexandria neighborhoods and urban villages. To generate an increased awareness and appreciation of the heritage of the entire City. To develop new museum exhibits/programs to serve Alexandria's newest and increasingly diverse immigrant populations, and expand the base of historical knowledge of all Alexandria neighborhoods and urban villages. To generate an increased awareness and appreciation of the heritage of the entire City.

Through the ongoing initiatives of the Alexandria Black History Museum, and special projects at other OHA facilities, the department celebrates the vibrant diversity of Alexandria through its services and public programs. Also, the OHA director is a member of the City's Diversity Committee, and the department participates in the annual Diversity Plan maintained by the City's Dept. of Human Resources. During the time frame established by this departmental plan, OHA will initiate its own Diversity Committee, and implement diversity issues identified in City Council's Strategic Plan. The department will also coordinate with the Human Rights Commission and Commission on Persons with Disabilities to identify issues associated with projects at all OHA sites.

**Objective 2.2 Expand Outreach and ADA Services**

To develop accessible programs and increase participation in OHA programs services.

A major objective contained in the Alexandria City Council Strategic Plan is to "Increase accessibility and public participation in arts, library, historical, archaeological, and cultural

resources.” OHA will continually review its facilities for physical access and compliance with ADA issues. OHA will partner and expand cooperation with Alexandria arts and historical organizations, as well as the City Library and Alexandria Archaeology to develop an inter-disciplinary approach to increase public access and participation in cultural activities during the timeframe of this plan. OHA will also continue to maintain staff support to Boards, Commissions, Stakeholder Advisory Groups and City committees to promote and disseminate local history initiatives. OHA will also continue to expand information on City history through website and electronic means, a new hardcover book on Alexandria history, and continuation of *The Alexandria Forum* decorative arts seminars.

One of the primary requests heard by OHA of community residents during the public planning process was the need for increased outreach services. Residents were particularly concerned that OHA identify and increase services to new audiences and those with special needs. Residents also requested that the department increase efforts to promote historic preservation issues, historic restoration techniques and information, and to provide education services on topics related to local architecture and history.

OHA has identified a number of new initiatives in this plan that address this issue, including development of a series of lectures and workshops that address history and preservation concerns, development of programs for new audiences that address the needs and diversity of specific audiences, and the continuation of offsite programs known to be important to the community.

Other concerns expressed during the public process were considered by OHA, but do not appear to be achievable during the timeframe of this plan. These are providing a public bus service to transport OHA museum guests to and from their homes, and from site to site. Currently there exists a comprehensive public transportation system within the City of Alexandria that reaches and connects every OHA museum within the City, and new door-to-door service would be very costly and duplicative.

Another suggestion, that OHA obtain and outfit a “Museum Bus” that would incorporate collections and exhibit items from across OHA museums to travel to City schools and other locations, also appears to be out of reach at this time. OHA will continue to provide outreach programs to schools, organizations and groups that promote visits to OHA museums and provide an advance orientation to museum resources.

**Objective 2.3 .Enhance Preservation & Development Planning Initiatives-**

To preserve and enhance Alexandria’s historic character and cultural resources, and to reflect the distinctive nature of its urban villages and neighborhoods, to attract and maintain businesses, residents, and visitors.

Alexandria's neighborhoods are distinctive for their gracious, appealing character which draws visitors, residents, businesses, and prosperity here. This distinctiveness is a result of the ongoing emphasis on preservation, whereby heritage is integrated with, instead of compromised by, ongoing development. The appeal is vital because Alexandria's historic structures, open spaces and artifacts are real and play a major part in the daily life of its citizens. Together they form an authentic urban environment unmatched by any theme park or modern development.

It is understood that the City of Alexandria is nearly built out with little undeveloped property remaining. Increasingly, new development will occur as re-development, and may include increasing height limits, higher densities, and mixed use projects. These realities must be creatively and carefully managed to coordinate with preservation objectives and to provide public amenities, including those which promote an increased understanding of local history.

A management plan covering historic preservation issues has been identified as a major priority for City Council, and the City is committed to update and further research information on existing historic areas so that planning decisions can be made using the most accurate information. This effort will include an update of the National Register Old and Historic Alexandria District, completion of the 100-Year-Old Buildings List, and developing new research efforts to identify previously unidentified historic resources within the City.

#### Planning & Zoning Coordination

This Strategic Plan outlines tasks and areas of interest for an efficient and beneficial historic function in Alexandria. The Office of Historic Alexandria overlaps in its interests with some of the functions of the City's Planning and Zoning Department as to historic preservation. The two agencies should coordinate activities and tasks so that there is clear understanding of roles and budget limitations and so that common interests and arenas are not duplicated. OHA's implementation of the goals and objectives identified in the *Alexandria City Council 2004-2015 Strategic Plan* (see Attachment B) envisions the continuation or initiation of projects and actions in its own departmental plan to achieve the following initiatives within the five-year period as laid out by City Council:

***Enhance the Role of Historic Preservation in Economic Sustainability through completion of Alexandria Historic Preservation Management Plan\****

During the past 20 years, the historic preservation movement has become a broad-based, multi-faceted movement where historic resources are means, not ends. And preservation has become a means of downtown revitalization, neighborhood stabilization, affordable housing, luxury housing, heritage tourism, education, and economic development. \*\* By completing the Alexandria Historic Preservation

Management Plan, authorized by City Council in 2008, Alexandria can incorporate the latest innovative strategies and best practices for its preservation “toolbox.”

***Support Sustainable Heritage Development opportunities\****

Sustainable Heritage Development is a revitalization strategy that enhances local quality of life through activities—preservation, conservation, recreation, interpretation, and community capacity building—that demonstrate respect for the people, the place, and the past. \*\*\*

***Promote Heritage Tourism initiatives\****

In Virginia, a recent study defined heritage visitors as those who did one or more of the following: visited a museum (in the Commonwealth, around 90% of the museums are history museums), visited a Civil War battlefield, or visited an historic site, and contrasted those patterns with visitors to Virginia who did none of those things. The study confirmed that heritage visitors stay longer, visit twice as many places, and on a per trip basis spend 2.5 times as much money as other visitors. Wherever heritage tourism has been evaluated nationwide, this basic tendency is observed: heritage visitors stay longer, spend more per day, and, therefore, have a significantly greater per trip economic impact. \*\*

***Review Historic District guidelines and standards to maintain local property values\****

Experts and institutions have studied the economic impact of historic district ordinances on real estate values across the country, using a variety of methodologies, with a consistent finding. Far and away the most common result is that properties within local historic districts appreciate at rates greater than the local market overall and faster than similar non-designated neighborhoods. Of the several dozen of these analyses performed nationwide, the worst-case scenario is that housing in a historic district appreciates at a rate equivalent to the local market as a whole. \*\*

***Preserve historic buildings to assist development of new businesses and jobs\****

A frequently unappreciated component of historic buildings is their role as natural incubators of small businesses. Currently in the United States, firms employing less than 20 people create 85% of all net new jobs. One of the few costs that firms of that size can control is occupancy cost – rents. In historic downtown areas, but especially in neighborhood commercial districts, a major contribution to the local economy is the relative affordability of older buildings. It is no accident that the creative, imaginative, small startup firm isn’t located in the corporate office “campus”, the industrial park, or the shopping center – they simply cannot afford the rents there. Older and historic commercial buildings play that role, nearly always with no subsidy or assistance of any kind.\*\*

***Promote Historic Preservation practices as environmentally “Green”\*\****

Landfills throughout the country are increasingly expensive in both dollars and environmental quality. Although a quarter of all waste dumped at the landfill is from construction debris, rarely is the environment impact caused by the demolition of historic buildings considered. However, it is estimated that for every small building demolished in Alexandria, the entire environmental benefit from community recycling of 1,344,000 aluminum cans is wiped out. The adaptive reuse and/or rehabilitation of historic buildings can considerably reduce the environmental, energy and labor costs associated with building replacement.\*\*

***Jobs that created and increased local household income are positive economic development measurements that result from the preservation of historic buildings.\****

The rehabilitation of older and historic buildings is particularly potent in creating new jobs and increased local income. As a rule of thumb, in the United States, new construction costs are roughly half materials and half labor. Rehabilitation, on the other hand, results in sixty to seventy percent labor costs, with the balance being materials. This labor intensity affects a local economy on multiple levels by re-circulating that paycheck within the community through the purchase of other goods and services.\*\*

***Rehabilitation of historic buildings has a greater impact on economic development than manufacturing or new construction\****

It is estimated that for the average manufacturing concern in Virginia, every million dollars of production means that 25.1 jobs are created, adding an average of \$558,082 to local household incomes. A million dollars spent on new construction will likewise create 32.2 jobs, adding about \$726,300 to local household incomes. However, those same million dollars in the rehabilitation of an historic building in Virginia yields 36.1 jobs, and adds nearly \$780,000 in new household income. And as real estate is a capital asset – like a drill press or a boxcar, it not only has an economic impact during construction, but a subsequent economic impact when it is in productive use. Additionally, since most building components have a useful life of between 25 and 40 years, a community could rehabilitate 2 to 3 percent of its building stock per year and have perpetual employment in the building trades.\*\*

A full copy of the revised *Alexandria City Council 2004-2015 Strategic Plan* may be found online at [www.alexandriava.gov](http://www.alexandriava.gov).

\* Historic Alexandria Resources Commission priority or key issue



\*\* Source- Economist Donovan Rypkema, Speaker at the Alexandria Historic Preservation Conference, May 2007.

\*\*\* Source- *Long Island North Shore Heritage Area Management Plan*, Peter J. Smith & Company, Buffalo, New York, December 2006.

**Goal 3.0 To foster a skilled and knowledgeable staff and corps of volunteers within OHA.**

**Objective 3.1 Maintain and Recruit Best Possible Candidates for Open Staff Positions**

To develop a high caliber staff that is well educated, professional and knowledgeable about history, archaeology, museology, finance and records management.

During the past five-year period, due to citywide budget pressures, OHA has lost a number of positions throughout most facilities of the department. During the next five years as the City's economy improves, OHA will request that certain positions eliminated during the recession be considered for restoration in a phased implementation. Specifically the department intends to request a Secretary position at Gadsby's Tavern Museum, a Curator I position at Alexandria Black History Museum, a Records Clerk position at Archives & Records Center, a Research Historian position in Administration, conversion of a PT to FT Museum Technician at Fort Ward Museum, the addition of part-time "Roster" staff at Alexandria Archaeology Museum and at Alexandria Black History Museum, and for a Special Events/Rental activities team trained to work at multiple sites. OHA will also seek to appoint a volunteer Town Crier and recommend the creation of a Development Officer/Deputy Director within the department. OHA will also work to maintain its successful volunteer program and to recruit new volunteers for its activities.

**Objective 3.2 Expand Volunteer Support**

To maintain and expand a high quality corps of volunteers throughout all OHA activities.

OHA's existing base of nearly 400 volunteers is substantial, and together they contribute thousands of hours of support annually. OHA will continue to recruit volunteers, subject to the ability of existing staff to manage, train and supervise additional volunteers at specific sites.

**Objective 3.3 Maintain and Expand Staff Development Opportunities**

To provide membership in appropriate professional membership organizations, access to quality publications, conferences and training for OHA staff.

Staff development is a major priority for OHA, and the department recognizes the need for staff to travel and participate in professional conferences and training (either as participants or

presenters), maintain membership in related organizations, and to have access to the latest professional journals, publications and materials. Maintaining a dedicated source of funding in annual budgets for conferences, training, professional memberships and publications is in the highest interests of the department and the citizens of Alexandria.

**Goal 4.0 To maintain the highest possible professional standards and implement the best practices and tools associated with the profession to accomplish each function.**

**Objective 4.1 Expand Partnerships**

To enhance communication and collaborative connectivity among Alexandria historic organizations, attractions, libraries and museums to promote sharing information, effort and resources.

OHA has long been recognized as a major partner in the Alexandria community, and has maintained excellent relationships with local organizations and groups for many years, including Agenda Alexandria, Alexandria Chamber of Commerce, Alexandria City public Schools, Alexandria Convention and Visitors Association, Alexandria Economic Development Partnership, Alexandria Historical Society, Alexandria Library, Alexandria Marketing Committee, Historic Alexandria Foundation, Lee-Fendall House Museum and Garden, Mount Vernon Estate and Gardens, Northern Virginia Regional Park Authority, Northern Virginia Urban League among others. OHA will also continue its relationship and financial support of the National Capital Boundary Stones Committee that coordinates the preservation and conservation of the historic corner and boundary stones placed in 1791 at each mile interval surrounding the City of Washington, D.C. Alexandria, Virginia, once part of the District of Columbia (from 1801 until 1847), still retains four of the original boundary markers, including the first and southernmost cornerstone place that marked the land that became the nation's capital.

From FY 2012 through FY 2016, OHA will also work to expand its relationships with Alexandria's businesses, corporate and non-profit agencies to develop a wider base of support for departmental operations. One example of this expansion will be the development of new, "behind the scenes" museum tour experiences available for concierge-level guests in the City's hotels, as a way to generate new revenue sources for supplemental funding in support of each museum, and increase understanding of OHA's role as the steward of Alexandria's heritage.

New "Friends" groups are also proposed in the department, such as implementation of the OHA departmental membership program and the proposed "Friends of Lloyd House" now being pursued by OHA in conjunction with the Alexandria Historical Restoration and

Preservation Commission. Existing “Friends” groups will also be maintained with expanded membership during this plan’s timeframe.

OHA also seeks to partner with the Alexandria Library to digitize documents and photographic collections to make them more accessible to researchers and the general public, and to develop potential new resource and revenue initiatives for both City agencies. Specific historic resource projects that could be targets for grants and other funding to OHA/Alexandria Library from other sources that could fall into three general categories:

1. Reviews of literature: Product(s) would be critical review article(s) suitable for publication in a regionally oriented academic journal;
2. Grants for digitization, cataloguing and indexing collections and other known historical resources within the City of Alexandria: Target should be publication of resources to the Web in formats and with access controls appropriate to the respective endeavors – with a well-developed and appropriate set of search terms for each published project;
3. Annotated catalogs of Alexandria historical resources located elsewhere, e.g., the papers of Kate Waller Barrett or Guy Atkinson that are housed at the Library of Congress could be an annotated collection of papers in its collections relevant to Alexandria.

In 2011, the OHA director was appointed by the United States Secretary of the Interior to a two-year appointment on the Star Spangled Banner National Historic Trail Advisory Council. The purpose of this Council is to make recommendations for planning initiatives associated with the new War of 1812 history trail that will traverse Maryland, Washington, D.C. and Virginia. This new partnership will also assist OHA in its War of 1812 programming efforts.

#### **Objective 4.2 Pursue Best Marketing Strategies**

To develop market research for each site that will provide an increased level of visitor engagement and result in increased visitation. To more effectively market and “brand” OHA sites, and to use market research surveys to develop responsive public history programs.

OHA will continue to increase its marketing and branding capabilities over the five-year period of this plan. Utilizing the new City funding for the Civil War Sesquicentennial, OHA will coordinate with the Virginia Tourism Corporation and Alexandria Convention and Visitors Association to target advertising dollars to heritage audiences, to develop tourism packages such as the successful “Key to the City” program, and will develop new printed and electronic materials to promote Historic Alexandria activities. The department will attempt to increase e-news subscribers to OHA’s electronic newsletters by 5% annually.

The OHA director will also continue to serve on the City's Marketing Coordinating Council, which recommends City funding for innovative business initiatives that increase retail, lodging and dining opportunities to increase public enjoyment of Alexandria, and increase tax revenues to the City.

**Objective 4.3 Incorporate New Technologies into Programs and Services**

To increase technological abilities through point of sale, collections, and fund raising software to complete redevelopment, enhancement, and expansion of content of the OHA departmental website.

OHA pioneered the use of social media in Alexandria's City government, and seeks to continue to be a leader in the use of technological resources to promote heritage services. Although over the past several years OHA has developed interpretive and marketing programs based on new technologies, such as cell phone tours, a Civil War app, and archaeology geo-caches, it is committed to advancing new technology applications as they develop.

A major priority will be to partner with the Dept. of Planning and Zoning to upgrade GIS applications and Surfer software for archaeological and historic district surveys and analysis in conjunction with the proposed Alexandria Historic Preservation Management Plan, and to implement the TAM retail system for OHA and other City departments.

**Goal 5.0 To align our organization, programs and practices to meet the lifelong learning needs of all customers.**

**Objective 5.1 Maintain and Expand Research Services**

To present an accurate, authentic, and complete history of the community and maintain its local, regional, national and international reputation as a heritage and cultural destination.

With the elimination of OHA's Research Historian position in FY 2010, the department transferred necessary site specific research to facilities associated with that requirement, and the Administrative Unit accepted responsibility for general historical research within the mission of the department. However, during that year a major research project on the African American settlement known as "The Fort" at Fort Ward Park, outside the Museum and Historic Site area, was requested by the community. OHA had not included such an initiative in its annual work plan for that year, nor had the project been recognized as a priority in future years.

However, in response to intense community interest and concern for the issue, OHA established a Fort Ward History Work Group, comprised of staff from select OHA museums and area residents and historians. This team, the first of its type in OHA, has worked together to provide ongoing research and support services to document the unusual heritage of the African American settlement that occupied the former Civil War fort site for nearly a century from the post-war period until about 1960. Though OHA staff was initially skeptical of the concept, the result has been a rousing success with documented research advancing archaeological and interpretive goals at the site, including the identification of long forgotten burial locations, well beyond expectations. The goal now is to complete enough of the Fort Ward research by 2013 so that a history and interpretive plan for the park can be prepared.

During the five-year timeframe established by the plan, OHA intends to establish other History Work Groups to work on other research topics of interest to the City or research topics identified by OHA as priorities. Staff would, of course, oversee the Work Group documentation process and coordinate individual efforts on the team project.

OHA will also work with other City agencies to prepare historical information for new street/place names, and for naming opportunities for other public cultural locations throughout the City.

### **Objective 5.2 Enhance Education & Life Long Learning Opportunities**

To develop engaging and visionary learning experiences for all.

OHA recognizes that one of its primary roles is as a facilitator of lifelong learning experiences for residents and visitors to Alexandria. OHA currently operates heritage programs for all ages from toddlers to seniors, and the department commits to maintaining and reenergizing its programs in the years ahead,

A major initiative will be to improve interaction with area schools, including revising OHA educational programs to coordinate with state learning standards and local curriculum, participation in the "Community Schools" program of Alexandria City Public Schools (ACPS), assisting with development of the creation of a "History Club" at T.C. Williams High School, and maintaining the "Project Enlightenment" living history performers in Alexandria, comprised of students at McLean High School.

### **Objective 5.3 Promote Interpretation of Local, Regional, State and American History**

To encourage a greater public appreciation of the value of Alexandria's heritage by gathering, interpreting, and disseminating information on the City's history and its relevance within the

larger context of Virginia and American history. This historical information will be provided to public audiences of all ages through educational programs, exhibitions, publications, the Internet, and other interpretive means.

OHA will continue to advance the interpretation and understanding of cultural and historic resources during the time frame established by this plan. In particular, the heritage focus of the department will be on the national defense issues associated with the War of 1812 and the American Civil War, both of which are recognized by significant anniversaries during the period of this plan, roughly from 2011 through 2015. Both conflicts contain issues that are controversial and uncomfortable from the different perspectives of residents and visitors to Alexandria, and need to be addressed carefully so that all viewpoints can be represented. OHA will attempt to highlight the social significance of each conflict, rather than focus on military heroes and strategy, to promote a greater understanding of the causes, impacts, and ultimate resolution of each war which have brought the United States to its present place in today's world.

OHA has also identified exhibit and event objectives at each OHA site so that an engaging and active public program can be achieved throughout the period of this plan. Special attention to develop programs geared to particular audiences and the needs of residents and visitors to Alexandria is also a priority. The department also commits to maintaining its role in interpretive signage and other public amenities associated with history, that are erected throughout the City during the timeframe of this plan.

OHA will also continue to maintain its ongoing commitment to interpretive activities at the Fort Ward site, "The Fort" associated with the African American settlement that existed in the post-Civil War period, and those National Park Service activities associated with the Captain John Smith Trail and Jones Point Park.

**Goal 6.0 To support and maintain civic culture, ongoing planning initiatives, special projects and economic sustainability within the City of Alexandria.**

**Objective 6.1 Increase Fund-Raising and Development Opportunities**

To request financial and staff support to ensure the success of the strategic plan. Financial support should be solicited by OHA from: the private sector, including individuals, businesses, corporations, foundations and non-profit agencies, through requests from private, federal and state grant funding sources, through preservation tax credits for individual and commercial property owners, and through City support of OHA's annual operating and capital budgets. To develop new (and increase current) grants, retail, membership, incidental, and special event revenue programs that provide additional non-City financial support to supplement City funding, while maintaining museum admission affordability and membership programs. To develop new museum exhibits/programs to serve Alexandria's newest and

increasingly diverse immigrant populations, and expand the base of historical knowledge of all Alexandria neighborhoods and urban villages to generate an increased awareness and appreciation of the heritage of the entire City so that civic culture is maintained and expanded.

During the past several years, OHA has embarked on a number of new projects to develop new or increased sources of non-City funding. The department has applied for “Project Grants-in-Aid,” developed new programs centered on facility rentals, weddings, birthday parties; and expanded social event activities such as an annual Historic Alexandria Museum Gala. In addition to site-specific museum stores, the department has also opened a new *Historic Alexandria History Center and Museum Store* offering visitor experiences and retail goods from all OHA museums at one location. OHA has also assumed responsibility for *The Alexandria Forum* decorative arts seminar that raises about \$9,000 in annual revenue. Although the development results have been relatively mixed in the challenging economy of the current recession, the department believes these activities will help sustain and supplement City funding in future years. OHA intends to continue and expand these activities in the next Five-Years, as well as initiate new revenue, solicitation and departmental membership programs during this time.

#### **Objective 6.2 Enhance Intermodal Transportation Opportunities**

To improve and enhance access to the City’s great wealth of historic sites and attractions, and to enhance the overall quality of life in Alexandria, through participation in programs to help manage and coordinate inter-modal transportation, including pedestrians, bicyclists, mass transit, and vehicular traffic. In support of this effort, the objective is to reduce the amount of tourism-related private car and motor coach traffic in the City, primarily by enhancing directional and interpretive signage, scripting historical information for narrated tours on public trolleys, providing technology-based interpretive applications, and developing walking and bicycle tours that highlight points of interest.

OHA has contributed to Alexandria’s intermodal transportation objectives during the past several years by preparing historical information for interpretive signage along roadways and at transportation centers, preparing four narrated scripts on the new King Street Trolley, and developing projects associated with pedestrians, bikeways and boat travel on the Potomac River. Mitigation of the impact of transportation projects on historic resources, such as replacement of the Woodrow Wilson Bridge on Interstate 95-495, motor coach parking, street repaving and traffic infrastructure installation are also priorities of OHA to be maintained during the period of this plan.

#### **Objective 6.3 Develop and Maintain Special Project Initiatives**

To develop Civil War Sesquicentennial, War of 1812 and other historical programs and reenactment events throughout the City of Alexandria, in conjunction with other regional

committees and state committees, such as the Virginia State Commission on the American Civil War Sesquicentennial. To continue historical research and archaeological investigation at Fort Ward Park and the Contrabands and Freedmen's Cemetery, including Native American, Civil War, and African American cultural resources. To annually update the OHA Five-Year Departmental Strategic Plan.

## **Evaluation and Measurement**

---

Measurement indicators are indicated below, and will be reviewed and/or adjusted as necessary each year as part of the Managing for Results Initiative (MFRI) process followed by the City of Alexandria. This is in line with the annual operating budget of OHA.

At the conclusion of each fiscal year (June 30), the Historic Alexandria Resources Commission, the Alexandria Historical Restoration and Preservation Commission, the Alexandria Archaeological Commission and the Public Records Advisory Commission will evaluate the individual tasks (as appropriate to the commission) that are identified in the Five-Year schedule established by OHA for completion during the year. Results will subsequently be reported to the Mayor and City Council in the annual reports submitted by each commission at the end of the fiscal year. The plan will thus be reviewed, updated, and amended annually to adjust to changing realities, implementation and responsibility.

### **Performance Measures**

For department/museum system as a whole:

1. % of visitors to City historic sites rating their overall experience as good to excellent
2. % of visitors who state they have gained an appreciation of local history
3. Total number of visitors/program participants served
4. OHA operating costs per resident
5. % of department effectiveness targets met
6. # of department FTEs managed

For individual museums:

7. # of visitors/program participants
8. % of visitors who rated their experience as good to excellent
9. Cost per visitor/program participant
10. \$ of revenue earned (The Lyceum-rental revenues only)
11. # of cubic feet of archaeological collections (Alexandria Archaeology Museum only)

For Archives & Records Center only

12. # of boxes received and destroyed
13. # of research/records requests processed
14. Cost per box received and destroyed
15. % boxes processed that met government standards
16. % of requests fulfilled within five days



The result of this strategic planning process is a five-year implementation schedule to implement, measure and assign responsibility for specific initiatives and tasks (Actions) necessary to achieve the goals and objectives identified in this OHA plan. These are established in the list of initiatives on the following pages:

Office of Historic Alexandria Five-Year Departmental Strategic Plan FY 2012-2016

List of Initiatives & Tasks aligned with Statgic Goals, Objectives, Implementation Schedule, Performance Measures and Assignment of Responsibility

GOAL #	OUTCOME		OBJECTIVE #	INITIATIVES & TASKS	FY 2012	FY 2013	FY 2014	FY 2015	FY 2016	RESPONSIBILITY
	MFRI #	TARGETS								
1.0			1.1	<b>PRESERVATION OF BUILDINGS &amp; SITES</b>						
1.0	5	95%	1.1	ACTION- Coordinate CIP Projects at each site	x	x	x	x	x	OHA, OHA Museums
1.0	5	95%	1.1	ACTION- Coordinate OHA CFMP Building Maintenance Schedule	x	x	x	x	x	OHA, OHA Museums
1.0	5	95%	1.1	ACTION- Prepare annual capital budget request for division	x	x	x	x	x	OHA, OHA Museums
1.0			1.2	<b>COLLECTIONS</b>						
1.0	5	95%	1.2	ACTION- Digitize museum collections and make available on website	x	x	x	x	x	OHA Museums
1.0	11	3200 cu. ft.	1.2	ACTION- Maintain # of cubic feet of archaeological collections	x	x	x	x	x	AA
1.0	5	95%	1.2	ACTION- Implement conservation of select collection items at each site	x	x	x	x	x	OHA Museums
1.0	5	95%	1.2	ACTION- Acquire appropriate collection items for each site annually	x	x	x	x	x	OHA Museums
1.0	5	95%	1.2	ACTION- Install high density shelving at Archives & Records Center	x		x			AR
1.0			1.3	<b>ADMINISTRATIVE &amp; LEGAL</b>						
1.0	12	2500	1.3	ACTION- Maintain # boxes received & destroyed	x	x	x	x	x	AR
1.0	13	1200	1.3	ACTION- # of research requestes processed	x	x	x	x	x	AR
1.0	14	\$91	1.3	ACTION- Cost per box received and destroyed	x	x	x	x	x	AR
1.0	15	98%	1.3	ACTION- % boxes processed that meet governments standards	x	x	x	x	x	AR
1.0	16	95%	1.3	ACTION- % of requests fulfilled within five days	x	x	x	x	x	AR
1.0	5	95%	1.3	ACTION- Maintain City Archaeology Code	x	x	x	x	x	AA
1.0	4	95%	1.3	ACTION- Prepare annual operating budget request for department	x	x	x	x	x	OHA, OHA Museums
1.0	5	95%	1.3	ACTION- Prepare reviews for BAR applications	x	x	x	x	x	OHA, AA
1.0	5	95%	1.3	ACTION- Prepare Easements, perform annual Inspections	x	x	x	x	x	OHA, AHRPC
1.0	5	95%	1.3	ACTION- Implement program for Historic Preservation Tax Credits	x	x	x	x	x	OHA, PZ, AHRPC
1.0	5	95%	1.3	ACTION- Implement full annual funding at SLAM	x	x	x	x	x	OHA, SLAM, MPS
1.0	5	95%	1.3	ACTION- Review safety objectives annually for each site	x	x	x	x	x	OHA, OHA Museums
1.0	5	95%	1.3	ACTION- Coordinate CIP, CFMP Projects at each site	x	x	x	x	x	OHA, OHA Museums
1.0	5	95%	1.3	ACTION- Establish/maintain departmental Safety Committee	x	x	x	x	x	OHA, OHA Museums
1.0	5	95%	1.3	ACTION- Upgrade website/printed materials for rentals	x	x				OHA, OHA Museums
1.0	5	95%	1.3	ACTION- Brief City Council members on heritage issues	x	x	x	x	x	OHA, OHA Museums

34

GOAL #	OUTCOME		OBJECTIVE #	INITIATIVES & TASKS	FY 2012	FY 2013	FY 2014	FY 2015	FY 2016	RESPONSIBILITY
	MFRI #	TARGETS								
1.0	5	95%	1.3	ACTION- Respond to outside requests for historical information	x	x	x	x	x	OHA, OHA Museums
1.0	4	\$17	1.3	ACTION- OHA cost per resident	x	x	x	x	x	OHA
1.0	9	\$4- \$37	1.3	ACTION- OHA cost per resident/program participant	x	x	x	x	x	OHA Museums
1.0	10	\$80,000	1.3	ACTION- \$ of revenue earned						LY
2.0			2.1	<b>DIVERSITY</b>						
2.0	5	95%	2.1	ACTION- Participate on City Diversity Committee	x	x	x	x	x	OHA
2.0	5	95%	2.1	ACTION- Establish departmental Diversity Committee	x	x	x	x	x	OHA, OHA Museums
2.0	5	95%	2.1	ACTION- Coordinate with Commission on Disabilities for ADA compliance at all sites	x	x	x	x	x	OHA, CPD
2	3,7	3000-4000	2.1	ACTION- Increase visitation to OHA museums by 2% annually						OHA, OHA Museums
2.0			2.2	<b>OUTREACH</b>						
2.0	8	95%	2.2	ACTION- Implement History Outreach Initiatives in City Strategic Plan Goal 7 <i>I. Increase accessibility and public participation in arts, library, historical, archaeological, and cultural resources, programs and services.</i>	x	x	x	x	x	OHA Museums
2.0	8	95%	2.2	<i>II. Develop special programs that meet the needs of specific audiences at each site.</i>	x	x	x	x	x	OHA Museums
2.0	8	95%	2.2	<i>III. Develop programs for diverse audiences and recent immigrants to Alexandria</i>	x	x	x	x	x	OHA Museums
2.0	8	95%	2.2	<i>IV. Develop printed and audio materials in foreign languages</i>	x	x	x	x	x	OHA Museums
2.0	8	95%	2.2	ACTION- Continue annual Alexandria Forum Decorative Arts Program	x	x	x	x	x	OHA
2.0	8	95%	2.2	ACTION- Implement Workshops on Historic Restoration	x	x	x	x	x	OHA, PZ
2.0	8	95%	2.2	ACTION- Implement Lecture Series on Architecture and Historic Preservation	x	x	x	x	x	OHA, PZ
2.0	8	95%	2.2	ACTION- Implement lecture series on Historic Preservation Tax Credits	x	x	x	x	x	OHA, PZ
2.0	5	95%	2.2	ACTION- Publish hardcover book on Alexandria history	x					OHA
2.0	5	95%	2.2	ACTION- Prepare weekly "This Week in Historic Alexandria" e-newsletter	x	x	x	x	x	OHA, OHA Museums
2.0			2.3	<b>PRESERVATION PLANNING</b>						
2.0	5	95%	2.3	ACTION- Prepare Hist. Pres. planning initiatives in City Strategic Plan Goal 7						
2.0	5	95%	2.3	HISTORIC PRESERVATION MANAGEMENT PLAN						
2.0	5	95%	2.3	<i>I. Identify and Formalize ACHRI</i>						OHA, AA, PZ
2.0	5	95%	2.3	Designated local Historic Districts		x				OHA, AA, PZ
2.0	5	95%	2.3	National Historic Landmarks		x				OHA, AA, PZ
2.0	5	95%	2.3	National Register Historic Districts and sites		x				OHA, AA, PZ
2.0	5	95%	2.3	Surveyed 100 year old buildings		x				OHA, AA, PZ

35

36

GOAL #	OUTCOME		OBJECTIVE #	INITIATIVES & TASKS	FY	FY	FY	FY	FY	RESPONSIBILITY
	MFRI #	TARGETS			2012	2013	2014	2015	2016	
2.0	5	95%	2.3	Known archaeological sites		x				OHA, AA, PZ
2.0	5	95%	2.3	Abandoned or known historic cemeteries		x				OHA, AA, PZ
2.0	5	95%	2.3	Designated historic trees		x				OHA, AA, PZ
2.0	5	95%	2.3	Easements		x				OHA, AA, PZ
2.0	5	95%	2.3	<i>II. Establish themes of significance</i>	x					OHA
2.0	5	95%	2.3	<i>III. Research Potential Cult. and Hist. Resources</i>						
2.0	5	95%	2.3	Complete 100-year-old buildings survey			x	x		PZ
2.0	5	95%	2.3	Identify significant structures less than 100 years old				x		OHA, AA, PZ
2.0	5	95%	2.3	Resurvey structures and sites within local HD's			x	x		C
2.0	5	95%	2.3	Identify potential archaeological resources			x	x		AA
2.0	5	95%	2.3	Identify significant streetscapes, views			x			OHA, AA, PZ
2.0	5	95%	2.3	<i>IV. Develop HP goals for P&amp;Z, Econ. Dev. Programs</i>						
2.0	5	95%	2.3	Develop criteria to establish levels of significance		x	x			OHA, AA, PZ
2.0	5	95%	2.3	Rank identified resources		x	x			OHA, AA, PZ
2.0	5	95%	2.3	Prioritize the preservation level of ranked resources		x	x			OHA, AA, PZ
2.0	5	95%	2.3	Review current BAR process		x	x			OHA, PZ
2.0	5	95%	2.3	Integrate ACHRI into City's GIS database	x	x	x			AA, PZ
2.0	5	95%	2.3	Integrate preservation into Small Area Plans	x	x	x			OHA, AA, PZ
2.0	5	95%	2.3	Integrate HP goals with other City plans and policies	x	x	x			OHA, PZ
2.0	5	95%	2.3	Integrate HP goals with outside agencies and organizations.	x	x	x			OHA, PZ
2.0	5	95%	2.3	<i>V. Establish Preservation Coordinating Committee</i>						
2.0	5	95%	2.3	Archaeology			x			AAC
2.0	5	95%	2.3	Historic Districts			x			BAR
2.0	5	95%	2.3	Easements			x			AHRPC
2.0	5	95%	2.3	Covenants			x			OHA
2.0	5	95%	2.3	Tax credits			x			OHA, PZ
2.0	5	95%	2.3	<i>VI. Evaluate Current BAR Processes, Other Regs.</i>						
2.0	5	95%	2.3	Zoning density and building height			x			OHA, PZ, BAR
2.0	5	95%	2.3	Site plan review			x			OHA, PZ, BAR
2.0	5	95%	2.3	Design review process		x	x			OHA, PZ, BAR
2.0	5	95%	2.3	Design standards	x	x	x			OHA, PZ, BAR
2.0	5	95%	2.3	"After the fact" BAR Review	x	x	x			OHA, PZ, BAR

GOAL #	OUTCOME		OBJECTIVE #	INITIATIVES & TASKS	FY 2012	FY 2013	FY 2014	FY 2015	FY 2016	RESPONSIBILITY
	MFRI #	TARGETS								
2.0	5	95%	2.3	Teardowns		x				OHA, PZ, BAR
2.0	5	95%	2.3	<i>VII. Examine New Strategies for Preservation</i>						
2.0	5	95%	2.3	Expansion of designated Historic Districts				x		OHA, PZ
2.0	5	95%	2.3	Local Historic Landmark designation				x		OHA, PZ
2.0	5	95%	2.3	Transfer of Development Rights			x			OHA, PZ
2.0	5	95%	2.3	Community Preservation Districts			x			OHA, PZ
2.0	5	95%	2.3	Acquisition of easements or development rights	x	x	x	x	x	OHA, PZ
2.0	5	95%	2.3	Rehabilitation subsidies				x		OHA, PZ
2.0	5	95%	2.3	Revolving Preservation Fund				x		OHA, PZ
2.0	5	95%	2.3	Tax Credits/Incentives				x		OHA, PZ
2.0	5	95%	2.3	Options for Expanding Period of Historical Significance				x		OHA, PZ
2.0	5	95%	2.3	Training for BAR Members	x	x	x	x	x	OHA, PZ
2.0	5	95%	2.3	Determine "Best Mgt. Practices" in Historic Preservation				x		OHA, PZ
2.0	5	95%	2.3	<i>VIII. Establish Interpretation for Education, Tourism</i>						
2.0	5	95%	2.3	Wayfinding, interpretive panels, historic markers	x	x	x	x	x	OHA, PZ, ACVA
2.0	5	95%	2.3	Historic preservation educational programs	x	x	x	x	x	OHA
2.0	5	95%	2.3	Museum programs based on heritage themes	x	x	x	x	x	OHA
2.0	5	95%	2.3	<i>IX. Identify Opportunities for Funding &amp; Support</i>						
2.0	5	95%	2.3	Develop external pres. resources and partnerships	x	x	x	x	x	OHA PZ, TES
2.0	5	95%	2.3	<i>X. Community Outreach</i>						
2.0	5	95%	2.3	Conduct community meetings during plan process		x	x	x	x	OHA, PZ, TES
2.0	5	95%	2.3	<i>XI. Review and Adoption by City Council</i>				x		OHA, CMO
2.0	5	95%	2.3	ACTION- Implement History initiatives in Waterfront Plan	x	x	x	x	x	OHA, AA, PZ
2.0	5	95%	2.3	ACTION- Implement History initiatives in Small Area Plans	x	x	x	x	x	OHA, AA, PZ
2.0	5	95%	2.3	ACTION- Implement History initiatives in City Strategic Plan Goal 7	x	x	x	x	x	OHA, Museums, AA, PZ
	5	95%	2.3	ACTION- Assist with preparation of Youth Master Plan		x	x			OHA, CS
2.0	5		2.3	ACTION- Assist with preparation of Housing Master Plan	x					
2.0	5	95%	2.3	ACTION- Prepare Fort Ward History Report	x					AA, FW
2.0	5	95%	2.3	ACTION- Prepare Fort Ward Interpretive Plan	x					AA, FW
2.0	5	95%	2.3	ACTION- Complete Stage 2 Fort Ward Archaeological Survey	x	x				AA
2.0	5	95%	2.3	ACTION- Complete Stage 3 Fort Ward Archaeological Survey		x	x	x		AA
2.0	5	95%	2.3	ACTION- Prepare Fort Ward Management Plan		x	x	x		OHA, AA, FW. RPCA

37

GOAL #	OUTCOME		OBJECTIVE #	INITIATIVES & TASKS	FY	FY	FY	FY	FY	RESPONSIBILITY
	MFRI #	TARGETS			2012	2013	2014	2015	2016	
2.0	5	95%	2.3	ACTION- Complete Fort Ward Cultural and Historic Resources Inventory		x	x			AA, FW
2.0	5	95%	2.3	ACTION- Coordinate w Inter-departmental Planning Projects/History	x	x	x	x	x	OHA, AA
2.0	5	95%	2.3	ACTION- Coordinate w Marketing Coordinating Council/History	x	x	x	x	x	OHA
2.0	5	95%	2.3	ACTION- Coordinate w Development Coordinating Council/History	x	x	x	x	x	OHA
2.0	5	95%	2.3	ACTION- Coordinate w Wayfinding Program/History	x	x	x	x	x	OHA, AA
	5	95%	2.3	ACTION- Coordinate w Economic Sustainability Programs/History	x	x	x	x	x	OHA, ACVA, AEDP
3.0			3.1	<b>HUMAN RESOURCES</b>						
3.0	6	26+	3.1	ACTION- Restore Secretary position at GTM	x					OHA, GTM, CMO
3.0	6	26+	3.1	ACTION- Request Special Events position at GTM			x			OHA, GTM, CMO
3.0	6	26+	3.1	ACTION- Recruit volunteer Town Crier	x					OHA, GTM
3.0	6	26+	3.1	ACTION- Recruit Research Historian position in Admin		x				
3.0	6	26+	3.1	ACTION- Restore Curator position at ABHM			x			OHA, ABHM, CMO
3.0	6	26+	3.1	ACTION- Restore Roster Staff positions at ABHM		x				OHA, ABHM, CMO
3.0	6	95%	3.1	ACTION- Convert PT Museum Technician to FT		x				OHA, FW, CMO
3.0	6	95%	3.1	ACTION- Restore Records Clerk at Archives & Records Center			x			OHA, AR, CMO
3.0	6	95%	3.1	ACTION- Restore PT rental staff at The Lyceum		x				OHA, LY, CMO
3.0	6	95%	3.1	ACTION- Request Developmt. Officer/Deputy Director for department					x	OHA, CMO
3.0	6	95%	3.1	ACTION- Evaluate re-organization of departmental staff	x	x	x	x	x	OHA, CMO
3.0			3.2	<b>VOLUNTEERS</b>						
3.0	6	400+	3.2	ACTION- Recruit/train volunteers for each site	x	x	x	x	x	OHA Museums
3.0			3.3	<b>STAFF DEVELOPMENT</b>						
3.0	6	95%	3.3	ACTION- Maintain professional memberships	x	x	x	x	x	OHA
3.0	6	95%	3.3	ACTION- Encourage attendance at professional conferences	x	x	x	x	x	OHA
3.0	6	95%	3.3	ACTION- Encourage training in appropriate disciplines	x	x	x	x	x	OHA
3.0	6	95%	3.3	ACTION- Maintain access to professional publications	x	x	x	x	x	OHA
4.0			4.1	<b>PARTNERSHIPS</b>						
4.0	5	95%	4.1	ACTION- Develop partnerships with hotels for special museum tours/experiences	x	x	x	x	x	OHA
4.0	5	95%	4.1	ACTION- Develop partnership with Alex. Public Library to digitize photos		x	x	x	x	OHA
4.0	5	95%	4.1	ACTION- Develop/maintain Friends groups at all sites	x	x	x	x	x	OHA Museums

38

GOAL #	OUTCOME		OBJECTIVE		INITIATIVES & TASKS	FY 2012	FY 2013	FY 2014	FY 2015	FY 2016	RESPONSIBILITY
	MFRI #	TARGETS	#								
4.0	5	95%	4.1		ACTION- Maintain partnerships with AAM, NTHP, NVMA, APVA, AEDP, ASBDC	x	x	x	x	x	OHA
4.0	5	95%	4.1		ACTION- Participate in NPS <i>Star-Spangled Banner Historic Trail Advisory Council</i>	x	x	x			OHA
4.0			4.2		<b>MARKETING</b>						
4.0	5	95%	4.2		ACTION- Increase Marketing efforts for department and individual museums	x	x	x	x	x	OHA, OHA Museums
4.0	5	95%	4.2		ACTION- Coordinate marketing initiatives with ACVA and VTC	x	x	x	x	x	OHA, ACVA, VTC
4.0	5	95%	4.2		ACTION-Expand "Key to the City" program for Civil War Sesquicentennial, War of 1812	x	x	x	x		OHA, ACVA
4.0	5	95%	4.2		ACTION- Increase e-News participants by 5% annually	x	x	x	x	x	OHA
4.0			4.3		<b>TECHNOLOGY</b>						
4.0	5	95%	4.3		ACTION- Expand "Ask Alex" cell phone self-guided tours	x	x	x	x	x	OHA, GTM
4.0	5	95%	4.3		ACTION- Expand geo-caches, webcasts, I-pod downloads	x	x	x	x	x	OHA, GTM, AA
4.0	5	95%	4.3		ACTION- Expand use of social media for all museums	x	x	x	x	x	OHA Museums
4.0	5	95%	4.3		ACTION- Expand blogs for all museums	x	x	x	x	x	OHA Museums
4.0	16	95%	4.3		ACTION- Digitize collections records, archives, public records	x	x	x	x	x	OHA Museums, AR
4.0	5	95%	4.3		ACTION- Update departmental website with new history materials	x	x	x	x	x	OHA, OHA Museums
5.0			5.1		<b>RESEARCH</b>						
5.0	5	95%	5.1		ACTION- Expand History Work Groups to additional subject areas	x	x	x	x	x	OHA, OHA Museums
5.0	5	95%	5.1		ACTION- Establish volunteer research positions in OHA Admin.		x				OHA
5.0	5	95%	5.1		ACTION- Assist City "naming" and public art opportunities	x	x	x	x	x	OHA, OHA Museums
5.0	5	95%	5.1		ACTION- Complete Fort Ward History/Interpretive Plans	x	x				OHA, AA, FW
5.0			5.2		<b>EDUCATION &amp; LIFE LONG LEARNING</b>						
5.0	1	95%	5.2		ACTION- Coordinate OHA participation in ACPS "Community Schools" program	x	x	x	x	x	OHA
5.0	1	95%	5.2		ACTION- Coordinate Education programs with ACPS	x	x	x	x	x	OHA Museums
5.0	1	95%	5.2		ACTION- Provide programs for adult audiences	x	x	x	x	x	OHA Museums
5.0			5.3		<b>INTERPRETATION</b>						
5.0	1	95%	5.3		ACTION- Implement History Interpretation Initiatives in City Strategic Plan Goal 7 <i>I. Capture the cultural diversity of Alexandria through oral histories, documents and historic images.</i>	x	x	x	x	x	OHA, OHA Museums
5.0	1	95%	5.3			x	x	x	x	x	OHA, OHA Museums

39

GOAL #	OUTCOME		OBJECTIVE		INITIATIVES & TASKS	FY 2012	FY 2013	FY 2014	FY 2015	FY 2016	RESPONSIBILITY
	MFRI #	TARGETS	#								
5.0	1	95%	5.3		ACTION- Develop Civil War Sesquicentennial Programs	x	x	x	x	x	OHA Msseums
5.0	2	95%	5.3		ACTION- Wayfinding Interpretive Signage	x	x	x	x	x	OHA, AA
5.0	2	95%	5.3		ACTION- Develop and initiate National Harbor Programs	x	x	x	x	x	OHA, OHA Museums
5.0	2	95%	5.3		ACTION- Develop War of 1812 programs	x	x	x	x		OHA, OHA Museums
5.0	2	95%	5.3		ACTION- Coordinate with National Park Service on Jones Point Park redevelopment	x	x				AA
5.0	2	95%	5.3		ACTION- Coordinate with National Park Service on Capt. John Smith Water Trail	x	x	x	x	x	OHA, AA
5.0	1	95%	5.3		ACTION- 1-2 temporary exhibits annually at ABHM, Lyceum	x	x	x	x	x	ABHM, LY
5.0	1	95%	5.3		ACTION- 6 special events annually at each museum site	x	x	x	x	x	OHA Museums
5.0	1	95%	5.3		ACTION- 1-2 temporary exhibit/special tour annually at FFH, SLAM, GTM, AA, FW	x	x	x	x	x	1, SLAM, GTM, AA, FW
5.0	1	95%	5.3		ACTION- Upgrade permanent exhibits annually at all museums	x	x	x	x	x	OHA Museums
5.0	1	95%	5.3		ACTION- Develop special programs that meet the needs of specific audiences at each site.	x	x	x	x	x	OHA Museums
6.0			6.1		<b>DEVELOPMENT</b>						
6.0	4,9	95%	6.1		ACTION- Coordinate annual social event for City historic sites and museums	x	x	x	x	x	OHA
6.0	4,9	95%	6.1		ACTION- Expand/maintain departmental/museum membership programs	x	x	x	x	x	OHA, OHA Museums
6.0	9	95%	6.1		ACTION- Increase non-City funding at each OHA museum by 2% annually	x	x	x	x	x	OHA Museums
6.0	9	95%	6.1		ACTION- Implement annual "Wish List" for museum projects	x	x	x	x	x	OHA Museums
6.0	9	95%	6.1		ACTION- Implement "Annual Giving" program at each site	x	x	x	x	x	OHA Museums
6.0	4	95%	6.1		ACTION- Solicit support for departmental projects	x	x	x	x	x	OHA
6.0			6.2		<b>TRANSPORTATION</b>						
6.0	5	95%	6.2		ACTION- Revise narrated scripts for King Street Trolley	x					OHA
6.0	5	95%	6.2		ACTION- Revise photo exhibit at Alex. Union Amtrak station, Reagan National Airport	x					AA
6.0	5	95%	6.2		ACTION- Participate in Potomac Yard Metro site selection and design	x	x	x	x	x	OHA, PZ, TES
6.0	5	95%	6.2		ACTION- Participate in Route 1 Streetcar Project	x	x	x	x	x	OHA, PZ, TES
6.0	5	95%	6.2		ACTION- Enhance intermodal systems, bikeways and pedestrian walkways	x	x	x	x	x	OHA, PZ, TES
6.0	5	95%	6.2		ACTION- Participate with FHWA in Woodrow Wilson Bridge mitigation projects	x	x				OHA, AA, PZ, TES
6.0			6.3		<b>SPECIAL PROJECTS</b>						
6.0	1,2,7,8	95%	6.3		Implement Civil War Sesquicentennial Programs	x	x	x	x		OHA, OHA Museums
6.0	1,2,7,8	95%	6.3		Implement War of 1812 Bicentennial Programs	x	x	x	x		OHA, OHA Museums

of



GOAL #	OUTCOME		OBJECTIVE #	INITIATIVES & TASKS	FY 2012	FY 2013	FY 2014	FY 2015	FY 2016	RESPONSIBILITY
	MFRI #	TARGETS								
6.0	1,2,7,8	95%	6.3	Implement Fort Ward Archaeology Surveys	x	x	x	x		OHA, AA, RPCA, TES
6.0	1,2,7,8	95%	6.3	Implement Fort Ward African American Historical Programs	x	x	x	x	x	OHA, AA, ABHM, FW
6.0	1,2,7,8	95%	6.3	Update OHA Strategic Plan Annually	x	x	x	x	x	AAC, AHRPC, HARC, PRAC, OHA, AR, OHA Museums

AHT- Alexandria Heritage Trail

AA- Alexandria Archaeology Museum

AAC- Alexandria Archaeological Commission

ACVA- Alexandria Convention & Visitors Assoc.

AEDP- Alexandria Economic development Partnership

AHRPC- Alexandria Historic Restoration and Preservation Commission

ABHM- Alexandria Black History Museum

AR- Archives & Records Center

BAR- Boards of Architectural Review

CMO- City Manager's Office

CPD- Commission on Persons with Disabilities

CS- Hired Consultant

FF- Friendship Firehouse Museum

FW- Fort Ward Museum & Historic Site

GTM- Gadsby's Tavern Museum

GS- General Services

HARC- Historic Alexandria Resources Commission

LY- The Lyceum, Alexandria's History Museum

OHA- OHA Administration

OHA Museums- All OHA Museums

PZ- Dept. of Planning & Zoning

PRAC- Public Records Advisory Commission

RPCA- Dept. of Recreation, Parks & Cultural Activities

SLAM- Stabler-Leadbeater Apothecary Museum

TES- Dept. of Transportation & Environmental Services

VTC- Virginia Tourism Commission

**ATTACHMENT II**

**THE OFFICE OF HISTORIC ALEXANDRIA**

**CODE OF ETHICS**

**PREFACE**

**I. GOVERNANCE**

**II. GUIDING PRINCIPLES**

**III. STANDARDS OF PERFORMANCE**

**IV. COLLECTIONS**

**V. PROGRAMS**

**VI. DEVELOPING AND MANAGING BUSINESS SUPPORT**

**VII. DEVELOPING AND MANAGING INDIVIDUAL DONOR SUPPORT**

Prepared by:  
The Office of Historic Alexandria  
June 15, 2011

Approved by City Council  
June 28, 2011

# THE OFFICE OF HISTORIC ALEXANDRIA

## CODE OF ETHICS

### PREFACE

The Office of Historic Alexandria (OHA), a department within the government of the City of Alexandria, consists of the administrative unit and the following eight institutions: Alexandria Archaeology, Alexandria Black History Museum, Archives and Records Management, Fort Ward Museum and Historic Site, Friendship Firehouse, Gadsby's Tavern Museum, The Lyceum, and the Stabler-Leadbeater Apothecary Museum. The City Council, elected by the citizens, forms the trustee body and acts as the governing authority. All staff report through the Director (department head) to the City Manager, who has been authorized by City Council to perform certain functions of the government. This Code specifically applies to all who work for and on behalf of the Office of Historic Alexandria, including the governing authority, employees within the Office of Historic Alexandria, and volunteers. The Code is put forth with the intent that the governing authority, staff and volunteers carry out their roles and responsibilities legally, ethically and effectively.

The role of the Office of Historic Alexandria is that of responsible stewardship of resources held in the public trust for the historic City. This responsibility includes the preservation of historic sites, archaeological sites, artifacts and records, and the use of these resources in accordance with professional practices and standards of scholarship.

The goal of the administration and eight institutions that comprise the Office of Historic Alexandria is to enhance the quality of Alexandria's urban environment for its residents by building a sense of community identity and continuity; by maintaining the City owned and operated museum system; by acquiring, protecting and preserving historic buildings, archaeological and historic sites, archives, records, collections and artifacts significant to the heritage of the City; by preserving and interpreting the historic cultural diversity of the City; and by supporting artistic expression. These significant contributions promote the City's national and international reputation. People and businesses are drawn to Alexandria as an attractive location in which to live, work, and play.

In order to properly fulfill the mandates of a museum system founded on public trust, it is imperative that all who work for and on behalf of the Office of Historic Alexandria understand, comply with, and be governed by a Code of Ethics. Ethics is a body of moral principles that permits judgments as to what is right and what is wrong in human conduct. This document enumerates the principles to be followed for maintaining public trust. It also establishes that the City of Alexandria and its Office of Historic Alexandria is committed to public accountability and is transparent in its mission and operations.

The staff of the Office of Historic Alexandria are employees of the City of Alexandria and are governed by the *City of Alexandria, Virginia, Employee Handbook* and the Administrative Regulations (AR's) established by the City. Prepared by members of the staff of the Office of

Historic Alexandria, this departmental Code of Ethics enhances these regulations with standards relating to the intellectual and cultural role of the Office of Historic Alexandria institutions. The major sources were codes of ethics of professional organizations to which the staff belong. These include: the American Association of Museums, the American Association for State and Local History, the Society of Professional Archaeologists, the Society of American Archivists. In addition, specific federal statutes were consulted, especially those regulations dealing with the Native American Graves Protection and Repatriation Act (NAGPRA).

The Drafting Committee will serve in an advisory capacity to the Office of Historic Alexandria, regarding the Code of Ethics and any future modifications. The Director of the Office of Historic Alexandria will, annually, appoint a special committee to review any ethical issues. This committee will offer advice as well as review any breach of this Code of Ethics. There will be three (3) members of this committee nominated by any member of the Office of Historic Alexandria. As part of the orientation of all new employees, supervisors will fully discuss the importance of the issues in this Code of Ethics and will provide the employee with a copy of the Code of Ethics.

For the purposes of this document, the word “artifact” refers to historic objects, objects of art or material culture, or materials of archival significance.

## **I. GOVERNANCE**

Through the Office of Historic Alexandria, the City of Alexandria governs historic properties, sites, objects, archives and information in various forms, as a public trust. It protects and enhances collections and programs, as well as their physical, human, and financial resources. It ensures that these resources support each institution’s mission, responds to the pluralism of society, and respects the diversity of the national and cultural commonwealth.

Thus, the City of Alexandria ensures that:

1. All those who work for or on behalf of the Office of Historic Alexandria understand and support its mission and public trust responsibilities;
2. Office of Historic Alexandria personnel understand and fulfill their trusteeship and act corporately, not as individuals;
3. The Office of Historic Alexandria’s collections, programs, and its physical, human, and financial resources are protected, maintained, and developed in support of OHA’s mission;
4. The Office of Historic Alexandria is responsive to and represents the interests of the citizens;

5. Working relationships among all who work for, or on behalf of, the Office of Historic Alexandria including employees, elected and appointed officials, and volunteers are based in equity and mutual respect;
6. Professional standards and practices inform and guide Office of Historic Alexandria operations;
7. Office of Historic Alexandria policies are articulated, and prudent oversight is practiced;
8. Office of Historic Alexandria governance promotes the public good, rather than individual gain.

## II. GUIDING PRINCIPLES

OHA's Guiding Principles are directly aligned with those established by the City of Alexandria in 2010:

*Ethical Behavior* – We act ethically by putting the public interest first, communicating openly, and consistently demonstrating professional integrity.

*Innovation* – We are not satisfied with the *status quo*; we value creativity and well-considered risk-taking as means to achieve organizational success.

*Leadership* – We have the courage and energy to step outside the existing culture, to start evolutionary, meaningful and sustainable change by creating new realities and moving people to purposeful action in order to overcome political, bureaucratic and resource barriers.

*Professionalism* – We are capable, lifelong learners, who model the competencies associated with our field, specialty or area of expertise.

*Respect* – We will avoid drama by exhibiting civility, empathy and restraint.

*Responsibility* – We are accountable, take ownership, and are receptive to feedback, whether favorable or unfavorable, in everything we do.

*Teamwork* – We work cooperatively in a collegial and supportive manner to meet common goals.

Grouped by content and delivery, our guiding principles provide the framework and boundaries of the Office of Historic Alexandria administration, institutions and related educational experiences. These experiences will involve archaeology, history or pre-history, historic preservation, public records or archival preservation. The result will be an authentic, creative and imaginative environment for lifelong learners, delivered in an aesthetically pleasing manner.

### **III. STANDARDS OF PERFORMANCE**

Those who work for or on behalf of the Office of Historic Alexandria with its affiliate institutions are entrusted with the historical, archival, cultural, archaeological, and artistic wealth of the City of Alexandria and, respectively, the Commonwealth of Virginia. It is therefore incumbent that those employed in these disciplines comply with local, state, and federal laws, and with applicable international conventions in carrying out their responsibilities to the community that they serve. They must maintain the highest level of professional integrity in all matters legal and ethical in order to elicit the complete confidence of the public.

Thus, the following Standards of Performance ensure that:

#### **Responsibility to the Public**

1. The staff of the Office of Historic Alexandria is committed to providing responsible and professional care for the collections they hold in trust for the City of Alexandria, its citizens, and the public at large. The staff maintains authenticity and accuracy in all research, programming, and promotional matters, and fulfills their trusteeship corporately, not as individuals.
2. The staff of the Office of Historic Alexandria does not knowingly compromise its public trust by acquiring for a personal collection, any artifact relating to the City of Alexandria without first giving the City the option to first acquire the artifact. Staff does not store personal collections on an institution's property or conduct research on personal collections on City time.
3. The staff of the Office of Historic Alexandria supports and complies with the terms of the UNESCO Convention in prohibiting and preventing the illicit import, export, and transfer of ownership of cultural property, and will comply with NAGPRA where applicable. The staff will not compromise the integrity of archaeological resources by excavation, metal detecting or other forms of collecting on archaeological sites for personal gain.
4. The staff of the Office of Historic Alexandria does not knowingly engage in conduct involving dishonesty, fraud, deceit, or misrepresentations regarding any professional matter in which they are involved, nor will the staff knowingly make a false statement. Staff will not give a professional opinion or make a public report without being thoroughly informed. Likewise, staff does not perform appraisals or prepare written authentications for the public.
5. The staff of the Office of Historic Alexandria serves the public in an impartial and fair manner and, insofar as possible, will comply with all reasonable requests for information.
6. The staff of the Office of Historic Alexandria does not use confidential information for personal advantage, nor participate in research that does not comply with appropriate professional standards.

7. As a natural adjunct to the positions they hold, staff of the Office of Historic Alexandria are encouraged to continue to increase their knowledge, levels of understanding, and familiarity with artifacts and their care, in the area of the City's culture for which they are responsible.

### **Responsibilities to Colleagues/Departments/Governing Agencies**

1. Those who work for or on behalf of the activities associated with the Office of Historic Alexandria, understand, are committed to, and support its mission and public trust responsibilities.
2. The staff of the Office of Historic Alexandria is sensitive to and has respect for the legitimate concerns of others.
3. The staff of the Office of Historic Alexandria gives appropriate credit for work done by others.
4. The staff of the Office of Historic Alexandria does not intentionally, falsely, or maliciously injure the reputation of anyone with whom they are associated.
5. Relationships with volunteers and support of organizations are important to the success of the institutions within the Office of Historic Alexandria. As such, the staff makes every effort to cultivate a broad base of citizen support, recognizing that these relationships are to be based upon a mutual respect, and for the good of the institution.
6. Professional activities may require involvement with groups, boards, and commissions within the community. Therefore, staff of the Office of Historic Alexandria recognizes these activities as necessary obligations of their positions that extend beyond normal working hours. When staff participates in these activities in an official capacity, they are compensated.
7. All research, documentation and writing, in any form, obtained or created by an employee with the scope of, or in furtherance of, his or her employment activities, becomes the property of the City, and is retained with the institution of origin in accordance with the Alexandria City Code (Sec. 2-6-10) and the Virginia Public Records Act (Sec. 42.1-66).
8. All staff of the Office of Historic Alexandria authorized to spend funds allocated for specific institutions should do so with honesty, and with regard only to the best interest of that respective institution. The staff will not accept gifts, favors, loans, or other remuneration from individuals and/or businesses doing business with the City and will be governed by the City's Administrative Regulation in this manner.

9. Staff of the Office of Historic Alexandria will ensure that any fundraising conducted on behalf of their institution, whether undertaken by staff, an auxiliary organization or volunteers will be conducted in an honest and forthright manner. All contributions, whether cash or services, should not be solicited with the promise of opportunity or advantage offered to the donor. All contributions must be used for the donor's intended purpose.
10. All outside employment must be approved in advance by the Director of the Office of Historic Alexandria and must meet the requirements of the City's Administrative Regulation on outside employment.
11. Staff members of the Office of Historic Alexandria may not use regular work hours for preparing materials related to employment activities for publication if those materials are to be published for private monetary gain. Staff may not use regular work hours for preparing non-City related materials for publication. For regulations addressing intellectual property and outside employment, staff should refer to AR- 6-1, Section VII, C and E.
12. Fees or honoraria accepted by staff of the Office of Historic Alexandria for lectures or writings on employment-related subjects prepared or conducted during regular work hours are depositions into the appropriate City account for their institution. When staff conducts these activities on personal time, they are encouraged to deposit a percentage of fees or honoraria into the appropriate account for their institution.
13. Staff members of the Office of Historic Alexandria may expect that their professional judgments will be heard and respected by the Director of the Office of Historic Alexandria, the City Manager, and City Council; and in return for such recognition, the staff members will likewise respect the expressions and decisions of these entities.

#### **IV. COLLECTIONS**

##### **Acquisition of Artifacts**

1. Artifacts accepted and acquired by the Office of Historic Alexandria must meet the conditions stated in the accepting institution's collection policy. Institutions of the Office of Historic Alexandria recognize the collecting sphere of other organizations within Alexandria. Staff members of the Office of Historic Alexandria abide by their institution's collection policy in all matters.
2. Artifacts in the custody of the Office of Historic Alexandria are cared for in keeping with professional standards and in accordance with the procedures stated in the institution's collections policy.

##### **New Acquisitions**

1. The Office of Historic Alexandria will:



- a. Rigorously research the provenance of an object prior to acquisition,
  - b. Make a concerted effort to obtain accurate written documentation with respect to the history of the object, including export and import documents, and
  - c. Require sellers, donors, and their representatives to provide all available information and documentation.
2. The Office of Historic Alexandria will comply with all applicable U.S. law, including treaties and international conventions of which the U.S. is a party, governing ownership and title, import and other issues critical to acquisitions decisions.
  3. Beyond the requirements of U.S. law, the Office of Historic Alexandria shall not acquire any object that, to the knowledge of the institution, has been illegally exported from its country of modern discovery or the country where it was last legally owned. Each Office of Historic Alexandria institution will also require documentation that the object was out of its probable country of modern discovery by November 17, 1970, the date on which the UNESCO Convention on the Means of Prohibiting and Preventing the Illicit Import, Export, and Transfer of Ownership of Cultural Property was signed.
  4. For objects exported from their country of modern discovery after November 17, 1970, the Office of Historic Alexandria will require documentation that the object has been or will be legally exported from its country of modern discovery, and legally imported into the United States.

### **Unlawful Appropriation of Objects during the Nazi Era**

The Office of Historic Alexandria will take all reasonable steps to resolve the Nazi-era provenance status of objects before acquiring them for the collections of each museum, whether by purchase, gift, bequest, or exchange.

1. Standard research on objects being considered for acquisition should include a request that the sellers, donors, or estate executors offering an object provide as much provenance information as they have available, with particular regard to the Nazi era.
2. Where the Nazi-era provenance is incomplete or uncertain for a proposed acquisition, the Office of Historic Alexandria should consider what additional research would be prudent or necessary to resolve the Nazi-era provenance status of the object before acquiring it. Such research may involve consulting appropriate sources of information, including available records and outside databases that track information concerning unlawfully appropriated objects.
3. In the absence of evidence of unlawful appropriation without subsequent restitution, the Office of Historic Alexandria may proceed with the acquisition. Currently available object and provenance information about any covered object should be made public as soon as practicable after the acquisition.

4. If credible evidence of unlawful appropriation without subsequent restitution is discovered, the Office of Historic Alexandria should notify the donor, seller, or estate executor of the nature of the evidence and should not proceed with acquisition of the object until taking further action to resolve these issues. Depending on the circumstances of the particular case, prudent or necessary actions may include consulting with the City Attorney or other qualified legal counsel and notifying other interested parties of the museum's findings.
5. Under certain circumstances, acquisition of objects with uncertain provenance may reveal further information about the object and may facilitate the possible resolution of its status. In such circumstances, the Office of Historic Alexandria may choose to proceed with the acquisition after determining that it would be lawful, appropriate, and prudent and provided that currently available object and provenance information is made public as soon as practicable after the acquisition.
6. The Office of Historic Alexandria will document research into the Nazi-era provenance of acquisitions.
7. Consistent with current practice in the museum field, the Office of Historic Alexandria will publish, display, or otherwise make accessible recent gifts, bequests, and purchases, thereby making all acquisitions available for further research, examination, and public review and accountability.

### **Existing Collections**

In order to advance further research, public trust, and accountability, the Office of Historic Alexandria will make available the known ownership history of archaeological material and ancient art in its collections, and make serious efforts to allocate time and funding to conduct research on objects where provenance is incomplete or uncertain.

### **Claims**

The Office of Historic Alexandria will respectfully and diligently address ownership claims to antiquities and archaeological material. Each claim, whether based on ethical or legal considerations, will be considered on its own merits.

When appropriate and reasonably practical, the Office of Historic Alexandria will seek to resolve claims through voluntary discussions directly with a claimant or facilitated by a third party.

### **Fiduciary Responsibilities**

Members of the governing authority, staff, and volunteers who participate in the acquisition and management of the collections should be knowledgeable concerning the legal compliance requirements and ethical standards that pertain to antiquities and archaeological materials, as well as the collecting policies and disclosure practices of the Office of Historic Alexandria.

## **Deaccessioning and Disposing of Artifacts**

The following gives special consideration to the issue of deaccessioning. The Office of Historic Alexandria's role as the custodian of artifacts is a public trust inherent in the Department's obligation to preserve and interpret Alexandria's heritage; therefore, any decision regarding the permanence of artifacts in the collections is particularly important.

1. Artifacts in the collections are retained permanently as long as they continue to be relevant and useful to the purposes and activities of the institution, and if they can be properly stored, preserved, and used. Deaccessioning of artifacts may be considered only when these conditions no longer prevail.
2. Artifacts selected for possible deaccession undergo a rigorous review by that institution's staff, including a waiting period of five years. Once this review process is complete, the list of artifacts slated for disposal is approved by the Director of the Office of Historic Alexandria and the City Council before final deaccession and disposal procedures are implemented.
3. Thus, in considering the alternatives for the disposition of the deaccessioned artifacts, the institution insures that:
  - a. The disposition is in the best interests of the institution, its public constituency, the public trust it represents in owning the collections, and the academic or cultural communities it also represents.
  - b. Preference should be given to retaining material that is pertinent to the historical, cultural, and archaeological heritage of the City of Alexandria, or respectively the Commonwealth of Virginia.
4. First consideration should be given to placing deaccessioned artifacts in other institutions of the Office of Historic Alexandria prior to offering them to other tax-exempt institutions where they may serve the intent of the donor. Artifacts transferred from one City-owned institution to another City-owned institution are exempt from the five-year review period.
5. If artifacts are ultimately offered for sale elsewhere, the sale should be accomplished through an advertised public auction, or in a manner that will best protect the interests, objectives, and the legal status of the Office of Historic Alexandria and its affiliate institutions.
6. Artifacts should not be given or sold directly to City employees, officers, members of the governing authority, friends, citizen support groups or associations, or to their representatives.

7. Funds derived from the disposal of artifacts through sale will be used solely for the advancement of the mission of the institution, and will be limited to acquisition or conservation of artifacts in the permanent collection.
8. Before disposal procedures are undertaken for any artifact, all reasonable efforts should be made to ascertain that the artifacts are free from restrictions that would prohibit such a transaction. Where restrictions are found to apply, the institution insures that:
  9. The artifact(s) to which restrictions apply are not disposed of until all reasonable efforts have been made to comply with the applicable conditions. If practicable and reasonable to do so, the institution should notify the donor of the intended disposal;
  10. The restrictions are observed unless a deviation of terms is authorized by a court of competent jurisdiction;
  11. If there is any question as to the intent or force of restrictions, the institution should seek the advice of the City Attorney before beginning the deaccessioning process.
  12. An adequate record of the conditions and circumstances under which artifacts are deaccessioned and disposed of should be made and retained as part of the institution's collection management records. Records of artifacts that are deaccessioned should include photographs.

### **Public Disclosure**

A written statement of the policy and procedure adopted and followed by the Office of Historic Alexandria institutions with respect to the acquisition and disposition of collection materials may be made available to donors or other responsible persons on request.

### **Truth in Presentation**

It is the responsibility of the staff of the Office of Historic Alexandria to use the artifacts and materials in the City-owned collections for the creation and dissemination of knowledge. Staff must use their best efforts to ensure that exhibits are honest and truthful and are presented with objective expression, especially in the sensitive areas of ethnic and social history. Exhibits must provide an honest and meaningful view of the subject, with candor and tact, and ensure that the resulting presentation reflects no personal bias, but one of total objective judgment.

### **Commercial Use of Collections**

Authorization for the manufacture and sale of reproductions of any artifact in City-owned collections must be approved by the Director of the Office of Historic Alexandria. The staff must ensure that all aspects of the process are carried out in a manner that will not discredit the integrity of the institution or the intrinsic value of the original artifact. All reproductions must be clearly and permanently marked as such.

## **Borrowing Objects**

1. The Office of Historic Alexandria will:
  - a. Ensure that each institution determines that there is a clear connection between the exhibition of the object(s) and the museum's mission, and that the inclusion of the object(s) is consistent with the intellectual integrity of the exhibition.
  - b. Require each institution to examine the lender's relationship to the institution to determine if there are potential conflicts of interest, or an appearance of a conflict, such as in cases where the lender has a formal or informal connection to museum decision-making.
  - c. Include guidelines and procedures to address such conflicts or the appearance of conflicts or influence. Such guidelines and procedures may require withdrawal from the decision-making process of those with a real or perceived conflict, extra vigilance by decision-makers, disclosure of the conflict, or declining the loan.
  - d. Prohibit each Office of Historic Alexandria institution from accepting any commission or fee from the sale of objects borrowed for exhibition. This prohibition does not apply to displays of objects explicitly organized for the sale of those objects — for example, craft shows.

## **Lender Involvement**

The Office of Historic Alexandria will assure that each affiliate institution will maintain intellectual integrity and institutional control over the exhibition. In following its policy, the Office of Historic Alexandria:

1. Will retain full decision-making authority over the content and presentation of the exhibition.
2. May consult with a potential lender, while retaining the full decision-making authority, on objects to be selected from the lender's collection and the significance to be given to those objects in the exhibition.
3. Will make public the source of funding where the lender is also a funder of the exhibition. If a museum receives a request for anonymity, the Office of Historic Alexandria will avoid such anonymity where it would conceal a conflict of interest (real or perceived) or raise other ethical issues.

## **V. PROGRAMS**

The Office of Historic Alexandria serves the Alexandria community, and society at large, by advancing an understanding and appreciation of society's cultural resources through exhibition, research, scholarship, publications, and educational activities. Revenue-producing activities build financial resources. These programs further the institutions' missions and are responsive to the concerns, interests, and needs of society.

Thus, the Office of Historic Alexandria ensures that:

1. Programs support the department's mission and public trust responsibilities;
2. Exhibitions, research, publications, and educational activities are founded on scholarship and marked by intellectual integrity;
3. Exhibitions, research, scholarship, publications, and educational activities reflect the cultural context of subject matter and respect diverse and pluralistic values, traditions, and concerns;
4. Programs take special care not to dilute or ignore historical accuracy and inclusiveness for the sake of public entertainment and popularity;
5. Intellectual freedom is supported and that there is free and open exploration and interpretation of the human experience;
6. Programs do not use collections except as specifically allowed within the institution's collection policy;
7. Programs encourage participation of the widest possible audience consistent with the institution's mission, resources and accessibility;
8. Activities that involve relationships with external entities are compatible with the institution's mission and support its public trust responsibilities;
9. Revenue-producing activities are compatible with the institution's mission and support its public trust responsibility with proceeds used solely for the advancement of the institution's mission.

## **VI. DEVELOPING AND MANAGING BUSINESS SUPPORT**

The Office of Historic Alexandria recognizes that soliciting and managing of business support is crucial in support of each institution's ability to fulfill its mission.

### **Delineation of Process and Fulfillment of Obligations**

The Office of Historic Alexandria shall outline the process used to make decisions about business support. The responsibilities of the governing body and key staff should be delineated. The Office of Historic Alexandria will ensure that the human and financial resources needed to fulfill its obligations in any museum/business relationship are available.

## **Potential Conflict of Interest**

No individual may use his/her position working for, or on behalf of, the Office of Historic Alexandria for personal gain, or to benefit another at the expense of the museum or facility, its mission, its reputation, and the community it serves. The Office of Historic Alexandria or its affiliated institutions will adopt procedures to address business support opportunities in which a member of the museum's governing authority or staff may have an interest. This should be consistent with any existing conflict of interest policy. Such a policy should include an individual's obligation to disclose any interest in the museum/business relationship under consideration. In creating such a policy, the Office of Historic Alexandria will:

1. Require that the individual recuse himself/herself from any discussion and/or action regarding decisions to accept support from a business with which he/she is associated or has an interest.
2. Require that the individual's inclusion in any discussion and/or action regarding any other aspect of the project or program to be supported by that business be disclosed publicly.

## **Exclusions**

The Office of Historic Alexandria will determine whether it will exclude any business or category of business because of the business's products and/or services, taking into consideration the characteristics, values, and attitudes of its community and audience, discipline, and mission. If the Office of Historic Alexandria chooses to make exclusions, it will be prepared to state and justify its policy. In creating a policy of exclusion, the Office of Historic Alexandria will consider:

1. products and/or services provided
2. business practices
3. whether to associate certain exclusions with particular activities (e.g., children's programming)

## **Business Use of Museum Names and Logos**

The Office of Historic Alexandria will state clearly the parameters for the use of any of its names and logos. In creating such a policy, the Office of Historic Alexandria will consider:

1. the contexts in which it will permit the use of its names and logos
2. its responsibility to approve all uses of its names and logos
3. specific prohibitions on the use of its names and logos
4. conformity with its policies for protecting intellectual property (e.g., trademark, copyright)

### **Business Promotion of the Museum/Business Relationship**

A business may wish to promote its relationship with the Office of Historic Alexandria, or one of its affiliated institutions, in its marketing, advertising, and public relations activities. In creating such a policy, the Office of Historic Alexandria will consider:

1. any limits on the scope of how and extent to which a business may promote its relationship with the Office of Historic Alexandria, or one of its affiliated institutions
2. the responsibility of the department to approve any promotion of a business relationship with the Office of Historic Alexandria, or one of its affiliated institutions

### **Recognition**

The Office of Historic Alexandria will consider the range of recognition it may offer a business supporter. In doing so, it will consider:

1. the general standards for recognizing business support, such as those relating to the use, placement, size, etc., of the business's logos, names, signage, etc.
2. the standards for recognizing business support based on the level of support received

### **Exclusive Arrangements**

The Office of Historic Alexandria will consider whether or not it is willing to enter into a relationship with a business that restricts the Office of Historic Alexandria or one of its affiliated institutions from receiving support from the business's competitors and/or from using a competitor's products and services.

### **Support from a Museum Vendor**

The Office of Historic Alexandria will ensure that any current or potential relationship between the Office of Historic Alexandria, or one of its affiliated institutions, and a vendor providing goods or services is not contingent upon a contribution from the vendor.

### **Documentation**

The Office of Historic Alexandria will ensure that all museum/business relationships are a matter of record and require that all documents relating to the development of business support be maintained.

### **Application of Policy**

The Office of Historic Alexandria will identify clearly all entities, such as "Friends" groups, components of a museum system, etc., that must comply with its policies about business support.



## **Procedures for Documenting Business Support**

The Office of Historic Alexandria will establish procedures for documenting museum/business relationships. Documentation should reflect the nature and complexity of the relationship; some agreements may be documented with standard forms or form letters while others may require contractual agreements or memoranda of understanding. The department will consider developing the following components in its documentation of business support:

1. Scope of the Relationship and Term of the Agreement
2. Forms of and Parameters for Recognition of Business Support
3. Procedures for Approval for the Use and Placement of Each Party's Names and Logos
4. Parameters for Promotion by the Business of the Museum/Business Relationship
5. Parameters of Any Exclusivity – An agreement should clearly define the category, scope, and term of the exclusivity.
6. Procedures for Terminating the Agreement

The Office of Historic Alexandria will include a provision for canceling an agreement. Grounds for canceling an agreement may include:

- a. engagement of a business in an activity that is counter to the department's or affiliated institution's policy and mission
  - b. changes in the ownership of a business or changes in its products and services that is not consistent with the department's or affiliated institution's mission, standards, values, and reputation or is not in the best interest of the community the museum serves
  - c. inability of either party to carry out its responsibilities as outlined in the agreement, due to unforeseen circumstances
7. Signature Page (including date and approval by legal counsel, if required)

## **Legal, Tax, and Accounting Issues**

The Office of Historic Alexandria will be familiar with applicable legal, tax, and accounting principles before engaging in a museum/business relationship. The department or an affiliated institution will seek appropriate legal, tax, and accounting advice, as needed, when developing and managing museum/business relationships.

1. Legal – The Office of Historic Alexandria shall be aware of and comply with applicable state and local laws as well as the body of general legal principles regarding solicitation, acceptance, and use of business support, including contributions. Particular areas of attention include contract law and laws regulating charitable contributions.

2. Tax – The Office of Historic Alexandria shall be aware of and comply with applicable federal, state, and local tax laws. The department will pay particular attention to IRS corporate sponsorship regulations. The department will be aware that the structure of its institutional/business relationships might determine the taxability of the resulting income. Appropriate tax reporting of exempt and taxable income is mandatory. The department will also be aware of special tax rules that prohibit individuals or businesses from inappropriately benefiting from an institutional/business relationship, as well as the general tax rules governing charitable contributions and business support.
3. Accounting – The Office of Historic Alexandria will comply with generally accepted accounting principles relating to accounting and crediting of revenue, including contributions.
4. Public Accountability – The Office of Historic Alexandria will respond to all public and media inquiries about its support from business, including allegations of unethical behavior, with a prompt, full, and frank discussion of the issue, the department's actions, and the rationale for such actions.

The Office of Historic Alexandria will avoid agreeing to requests for anonymity where such anonymity conceals a conflict of interest, real or perceived, or raises other ethical concerns.

## **VII. DEVELOPING AND MANAGING INDIVIDUAL DONOR SUPPORT**

The Office of Historic Alexandria recognizes that soliciting and managing of individual donor support is crucial in support to each institution's ability to fulfill its mission.

### **Delineation of Process and Fulfillment of Obligations**

The Office of Historic Alexandria will outline the process used to make decisions about individual donor support. Such decisions include but are not limited to solicitation, gift acceptance, fulfillment, recognition, and public inquiry. The responsibilities of the governing body and staff should be delineated. The department will ensure that it has the necessary human and financial resources for fulfilling its obligations in any museum/donor relationship.

### **Potential Conflict of Interest**

No individual working for or on behalf of an Office of Historic Alexandria institution may use his/her position in the governing authority, department or affiliate institutions for personal gain or to benefit another at the expense of the Office of Historic Alexandria institution, its mission, its reputation, and the community it serves.

The Office of Historic Alexandria will adopt procedures to address individual donor support opportunities in which a member of the governing authority or Office of Historic Alexandria staff may have an interest. This should be consistent with any existing conflict-of-interest policy. Such a policy should include an individual's obligation to disclose any interest in the museum/donor relationship under consideration. Such disclosure does not preclude or imply ethical impropriety. In creating such a policy, the Office of Historic Alexandria will consider:

1. requiring that the individual recuse him/herself from any discussion and/or action regarding decisions to accept support from a donor with whom he/she is associated or has an interest
2. documenting the individual's role in any other aspect of the project or program supported by that donation

### **Donor Communication and Relationships**

The Office of Historic Alexandria will develop clear procedures concerning which staff and/or governing authority members are authorized to make or change agreements with individual donors. In addition, The Office of Historic Alexandria will have a clear policy concerning the level of financial, tax, and legal information it will provide to individual or potential donors, including a policy of recommending that donors consult their own legal and financial advisors.

### **Types of Individual Donor Support a Museum will Accept**

The Office of Historic Alexandria will develop a gift acceptance policy outlining the types of support it accepts from individual donors and delineating a process for determining whether or not — from a mission, operational, business, and legal perspective — to accept a gift as offered.

### **Recognition**

The Office of Historic Alexandria will consider the range of recognition it may offer an individual donor. In doing so, it may consider:

1. the general standards for recognizing individual donor support based on the level of support received
2. the standards for recognizing individual donor support, such as those relating to the use, placement, size, etc., of names, signage, etc.

### **Confidentiality**

The Office of Historic Alexandria will ensure that a relationship of trust is established and maintained with its individual donors by respecting the private nature of information about the donor and the donation. In doing so, will consider:

1. developing a system to control access to and handling of donor information
2. balancing the Office of Historic Alexandria's obligation to maintain public accountability with its obligation to protect donors' privacy by outlining what type of information can and cannot be kept confidential
3. collecting only relevant information about donors or potential donors

## **Anonymity**

The Office of Historic Alexandria will determine whether and under what circumstances it will accept anonymous gifts. An institution should avoid agreeing to requests for anonymity that conceal a conflict of interest, real or perceived, or raise other ethical concerns.

## **Uncollectable Pledges**

The Office of Historic Alexandria recognizes that instances may arise when donors cannot or do not honor a pledge. In determining the enforceability of a pledge that is not honored, the Office of Historic Alexandria will consider:

1. the legal and accounting implications
2. the overall impact of the gift on the department or affiliated institution
3. the history and previous relationship with the donor
4. the attitude of the community toward the situation

## **Documentation**

The Office of Historic Alexandria will require that all documents relating to the development of individual donor support be maintained and retained in accordance with applicable law and record retention policies.

## **Application of Policy**

The Office of Historic Alexandria will identify clearly all entities, such as “Friends” groups, voluntary organizations, components of a museum system, etc., that must comply with its policies about individual donor support.

## **Procedures for Documenting Individual Donor Support**

The Office of Historic Alexandria will establish procedures for documenting institutional/donor relationships. Documentation should reflect the nature and complexity of the relationship; some agreements may be documented with standard forms or form letters while others may require contractual agreements or memoranda of understanding. The department may consider including the following components in its documentation of individual donor support:

1. Scope of the Relationship and Term of the Agreement – The Office of Historic Alexandria and individual donor should specify the activity(ies) for which the support may be used and whether there are any time limitations to the support.
2. Forms of and Parameters for Recognition – The Office of Historic Alexandria and individual donor should agree on the manner in which the donation will be recognized. All recognition must comply with the department’s policy on recognition.

3. Contingencies in Case of Institutional or Programmatic Change – When appropriate, the Office of Historic Alexandria will consider adding a contingency plan to the scope of the support in case of institutional or programmatic changes. These plans are intended to ensure that the support can advance the future mission and goals of the department and its affiliate institutions and may specify among other things:
  - a. an acknowledgement that institutional and programmatic change may require that original scope of the support be flexible
  - b. how to make such changes in cases where the donor is deceased, heirs not available, or the estate not active
4. Procedures for Terminating the Agreement – The Office of Historic Alexandria shall consider including a cancellation provision. Grounds for canceling an agreement may include:
  - a. engagement of an individual in an activity that is counter to the department's or an affiliated institution's policy, mission, and good reputation
  - b. inability of either party to carry out its responsibilities as outlined in the agreement, due to unforeseen circumstances
5. Signature Page (including date and approval by legal counsel, if required)

### **Legal, Tax, and Accounting Issues**

The Office of Historic Alexandria will be familiar with applicable legal, tax, and accounting principles before engaging in a museum/donor relationship. The department and/or its affiliate institutions will seek appropriate legal, tax, and accounting advice, as needed, when developing and managing individual donor relationships.

1. Legal – The Office of Historic Alexandria will be aware of and comply with applicable state and local laws as well as the body of general legal principles regarding solicitation, acceptance, and use of individual donor support. Particular areas of attention include contract law and laws regulating charitable contributions.
2. Tax – The Office of Historic Alexandria will be aware of and comply with applicable federal, state, and local tax laws. The department also will be aware of special tax laws and rules that prohibit individuals from inappropriately benefiting from a contributory or other voluntary support relationship.
3. Accounting – The Office of Historic Alexandria will comply with generally accepted accounting principles relating to accounting and crediting of revenue (including contributions) in accordance with FASB or GASB. In addition, the Office of Historic Alexandria and/or its affiliate institutions should report fundraising results in a consistent manner, using standards for campaign reporting.

4. Public Accountability – The Office of Historic Alexandria and/or its affiliated institutions will respond to all public and media inquiries about its support from individual donors, including allegations of unethical behavior, with a prompt, full, and frank discussion of the issue, the institution's actions, and the rationale for such actions.

**ETHICAL GUIDELINES FOR VOLUNTEERS IN THE OFFICE OF HISTORIC ALEXANDRIA**

Office of Historic Alexandria acknowledges the valuable contribution it receives through the interest, time, and experience given by volunteers who serve its various divisions. Because of the nature and extent of involvement of volunteers in the Office of Historic Alexandria's activities, standards of conduct are set herewith to define the responsibilities and obligations of this volunteer service.

These general rules apply to all divisions within the Office of Historic Alexandria, each of which may have more specific guidelines tailored to their individual collections programs. These standards are consistent with those of the City of Alexandria.

Volunteers often function in an important public relations capacity, providing a variety of services on behalf of the institution and the City of Alexandria. As such, they should be aware that their presence and presentation may be the first and only impression that a visitor receives of the City of Alexandria as well as of their institution.

Volunteers carry out assignments in good spirit and seek the assistance of staff in situations requiring special guidance.

Volunteers represent the institution only when specifically appointed by the director of the institution. All questions from the media or from visitors concerning programs and policies should be directed to the institution's staff.

Volunteer service shall be undertaken for the betterment of the community, personal reward and the satisfaction derived from such participation. A volunteer may not accept compensation for performance of tasks as a volunteer. Personal compensation includes money or any other thing of value.

Volunteers who have access to museum collections, public records, research staff activities, and associated privileged information should help preserve the security and integrity of the collections and public records.

I agree to abide by the Office of Historic Alexandria's Ethical Guidelines as it applies to

\_\_\_\_\_  
Signature \_\_\_\_\_

\_\_\_\_\_  
Date \_\_\_\_\_

Adapted from the guidelines from the Smithsonian Institution

## ATTACHMENT III

### CITY COUNCIL GOALS

---

The *OHA Five Year Strategic Plan FY 2012-2016* is directly aligned with the *Alexandria City Council 2004-2015 Strategic Plan*, as revised in June 2010, and which states in part:

This 2010 City Council Strategic Plan has been developed in collaboration and in partnership with the Alexandria community. It is a carefully planned effort to advance Alexandria toward the future we envision for our community. As we move forward to implement the direction offered by the Strategic Plan, the Alexandria City Council affirms its commitment to the Plan's objectives and initiatives. Consequently, Council directs that City staff consider the Strategic Plan when developing, implementing or reviewing the delivery of public services, and in presenting requests for fiscal resources.

Two goals established in the *Alexandria City Council 2004-2015 Strategic Plan* pertain to OHA activities, and the departmental response to each goal, as identified as priorities and key issues for the City Council Strategic Plan by the Historic Alexandria Resources Commission, are as follows:

**Goal 1:** *There is Quality Development and Redevelopment, Support for Local Businesses, and a Strong, Diverse, and Growing Local Economy*

**Objective:** Increase the vitality and economic success of the City Waterfront and King Street Corridor while maintaining and strengthening the City's commitment to historic preservation and neighborhood quality of life.

Initiatives:

- Increase the appeal of King Street and the Waterfront to shoppers and diners. Support a vital hotel sector by attracting more overnight guests.
- Improve access, circulation, and parking, making it easier and more pleasant for visitors and residents to travel by all modes to the King Street/Waterfront area, locate their intended destination and parking options, and discover additional places of interest.



**Goal 7:** *Alexandria is a caring and inclusive community that values its rich diversity, history, and culture, and promotes affordability.*

**Objective:** Promote equitable access to lifelong learning opportunities through arts, library, historical, archaeological, and cultural resources, programs, and services.

Initiatives:

- Identify and implement funding strategies for public art that provide for the integration of the arts into public and private development and redevelopment projects throughout the City.
- Complete the Alexandria Historic Preservation Management Plan and set priorities for preservation that enhance, maintain and promote Alexandria's unique resources, support sustainable heritage tourism and promote economic development of the City.
- Develop a public art master plan setting priorities for the locations and funding of projects and providing a framework for the shared financial and professional resources needed.
- Increase accessibility and public participation in arts, library, historical, archaeological, and cultural resources, programs, and services.
- Launch a collaborative marketing campaign with arts organizations, schools, museums, libraries, and recreation centers that promotes arts, library, history, archaeology, and cultural programs and services offered by the City and nonprofit organizations.
- Conduct a library feasibility study to determine current and future needs.
- Capture the cultural diversity of Alexandria through oral histories, documents, and historic images.

27.1  

---

6-26-12

**Jackie Henderson**

---

**From:** Gloria Sitton  
**Sent:** Tuesday, June 26, 2012 11:05 AM  
**To:** William Euille; Frank Fannon; Alicia Hughes; Rob Krupicka; Paul Smedberg  
**Cc:** Beth Temple; John O'Neal; Karen Parker; Elizabeth Jones; Nancy Lavalley; Jackie Henderson  
**Subject:** Message from Ethel Underwood

All,  
Ms. Ethel Underwood (703-751-3638) called to requested support for the docket item #27.1 (Consideration of approval of the American Association of Museums Accreditation Process of the Office of Historic Alexandria). She said Council approval would be helpful as the Black History Museum is applying for accreditation. She asked that I pass this message along.

Gloria Sitton  
Deputy City Clerk  
City of Alexandria  
703-746-4550  
[gloria.sitton@alexandriava.gov](mailto:gloria.sitton@alexandriava.gov)

GO GREEN -- Tip: Store emails and other documents electronically. Paper makes up more of our garbage than any other type of trash at almost 40%.

27.1  
6-26-12

**Jackie Henderson**

**From:** Virginia Arnold <varnold13@comcast.net>  
**Sent:** Friday, June 22, 2012 5:15 PM  
**To:** William Euille; Frank Fannon; Kerry Donley; Alicia Hughes; Del Pepper; Paul Smedberg; Rose Boyd; Jackie Henderson; Rob Krupicka; Linda Owens; Elizabeth Jones  
**Subject:** COA Contact Us: Support letter for OHA-on 6/26 docket  
**Attachments:** 01b8ad2cc32d167c4f98e38ce99e6ad6.docx; ATT00001.txt

**COA Contact Us: Mayor, Vice Mayor, and Council Members**

**Time:** [Fri Jun 22, 2012 17:14:40] **Message ID:** [40285]

**Issue Type:** Mayor, Vice Mayor, and Council Members  
**First Name:** Virginia  
**Last Name:** Arnold  
**Street Address:** 316 N. Columbus Street  
**City:** Alexandria  
**State:** VA  
**Zip:** 22314  
**Phone:** 703-837-0170  
**Email Address:** [varnold13@comcast.net](mailto:varnold13@comcast.net)  
**Subject:** Support letter for OHA-on 6/26 docket  
I also hand-carried a copy of this resolution from the Public Records Advisory Commission to the council clerk's office today. It supports the Office of Historic Alexandria's request for approval of their five-year  
**Comments:** plan that comes before city council next Tuesday, June 26, 2012.  
Thank  
you,  
Virginia Arnold  
Chairman, Public Records Advisory Commission  
**Attachment:** 01b8ad2cc32d167c4f98e38ce99e6ad6.docx

Public Records Advisory Commission  
City of Alexandria, Virginia

---

JUNE 22, 2012

MAYOR EUILLE AND CITY COUNCIL  
ALEXANDRIA CITY HALL  
301 KING STREET  
ALEXANDRIA, VA 22314

MAYOR EUILLE AND MEMBERS OF CITY COUNCIL,

THE PUBLIC RECORDS ADVISORY COMMISSION HAS UNANIMOUSLY PASSED THE FOLLOWING RESOLUTION:

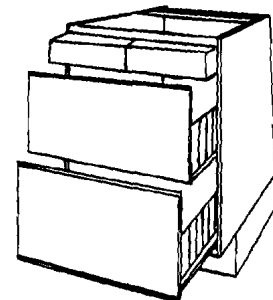
*-THE PUBLIC RECORDS ADVISORY COMMISSION URGES THE CITY COUNCIL TO SUPPORT AND APPROVE THE OFFICE OF HISTORIC ALEXANDRIA'S DEPARTMENTAL FIVE-YEAR STRATEGIC PLAN FOR FY 2012-2016 THAT WILL COME BEFORE THE COUNCIL ON TUESDAY, JUNE 26, 2012.*

*RESPECTFULLY SUBMITTED BY,*

*VIRGINIA ARNOLD  
CHAIRMAN, PRAC  
VARNOLD13@COMCAST.NET*

*AND MEMBERS:*

*NILS KANDELIN  
ANTHONY JONES  
ELLEN BRISCOE  
LAURA VETTER  
CHARLES ZIEGLER*



The Commission provides advice and guidance to the City Records Administrator on records management matters and implementation of the records program in the City. The Commission is composed of professional archivists, records managers, historians, research specialists, and citizens.