

60 TIPS IN 60 MINUTES: AFFORDABLE ACTIONS TO TAKE NOW

The following information was presented at the American Association of Museums conference in Philadelphia on May 3, 2009.

The Panel

Museums are complex operations driven primarily by research, collecting, programming and visitor service. This reality – in concert with the current economic crisis, which is resulting in chronic understaffing and lack of funding – leaves many institutions at a disadvantage when it comes to affordable everyday planning and improvements.

The panel consisted of leading museum professionals presenting free and affordable “actionable” tips on Development, Marketing, Education, Operations, and Exhibition Planning and Implementation. Session attendees learned innovative approaches and were reminded of best practices to help them improve their institution. Since all tips were no cost or low cost, it is expected that everyone walked away with at least a few ideas to improve institutional performance.

The presenters were:

Amy Kaufman, Managing Director, U.S. of Lord Cultural Resources, has dedicated her career to arts management for over 15 years. She has demonstrated success in business and strategic planning, organizational development, staff training, visitor services, and operational implementation. Before joining Lord Cultural Resources, Amy was Director of Operations for Special Projects and Director of Visitor Services at the Solomon R. Guggenheim Museum in New York during a period of major expansion. Since then, Amy has worked with over 45 museums and cultural clients, and played a leading role in the planning of multiple new museum projects and operations.

Bill Simmons is a Senior Vice President at Grenzebach Glier & Associates, Inc., an international fundraising-consulting firm recognized for industry leadership in all facets of philanthropic management. They provide strategic, technical, and analytic expertise that fosters sustainable, transformational philanthropy. Bill’s credentials include founding roles in two major museums: Liberty Science Center in New Jersey, and the Intrepid Sea-Air-Space Museum in New York City. Additionally, Mr. Simmons’ clients have included the Audubon Institute, Baylor College of Medicine, the Jewish Museum, Houston Symphony, National Museum of American History, and Zoological Society of Houston, among others.

Jessica Ludwig is the Director of Exhibition Planning and Implementation at the Solomon R. Guggenheim Museum. Over the last ten years she has played a leading role in both graphic design and exhibition management. Jessica has steadily built upon her background in design to become an expert planner and project manager. She now spearheads the budgeting and planning of all exhibitions installed at the flagship building on 5th Avenue, overseeing a cluster of technical and design departments. Jessica also regularly manages complex international traveling exhibitions, including *The Worlds of Nam June Paik*, *The Art of the Motorcycle*, and most recently, *Cai Guo-Qiang: I Want to Believe*.

Sonnet Takahisa is the Director of Education at the National September 11 Memorial & Museum. From 2003 - 2006, she was a Senior Program Officer for Arts and Cultural Partnerships at New Visions for Public Schools, creating and supporting 120 high schools. For 10 years she was Founding Co-Director of The NYC Museum School. Ms. Takahisa has over 30 years of experience in museums and schools; she serves on numerous review panels, boards, and as a consultant to museums, arts organizations, and schools. She worked as an educator at the Boston Children's Museum, Seattle Art Museum, and Brooklyn Museum.

Amy Shearer has recently joined the Philadelphia Zoo as Chief Marketing Officer. Currently, she oversees all marketing and communication efforts including advertising, media relations, market research, membership operations, website initiatives, public events, and collateral development for an institution welcoming nearly 1.2 million people annually. Prior to joining the Zoo, Amy served as the Marketing and Public Relations Department Head at Longwood Gardens and over the course of her 18-year career, she's led the marketing and public relations efforts for private sector and government entities. As the Corporate Marketing and Sales Director for Mrs. Fields Cookies – Catalogue Division, Amy was responsible for establishing the first national corporate marketing and sales program for the company.

The Tips

Following is a summary of the tips that were presented by the panel:

General Institutional Health and Operations (Amy Kaufman)

- 1. Align institutional goals and priorities**

Ideally there is a Strategic Plan in place. Ideally this plan was developed in an inclusive environment that took both Board and Staff perspectives into account. Ideally this plan has measurable objectives and outcomes, and each task has a leader and a target completion date.

However, even if there is no strategic plan, you can still make sure that Board and Staff are working toward common goals. Everyone should understand the operating model (revenue sources and expenses), and priorities for future growth. Initiatives can be advanced by writing briefs or rationales that articulate strategies and expected outcomes. These briefs can be submitted to the Director or Deputy Director for approval.

2. Review your organizational chart and plan for evolution

Make sure that you have clearly articulated reporting structures, job descriptions and desired new positions for the future. Examine the organization: Are like-minded people grouped to work together (collections, content, external affairs, operations)? Is strong supervision in place? What are the areas of weakness?

3. Create an operations committee

In terms of operations – both back of house and front of house – the big picture is often overlooked. Visitor service may be very good, but it will never be elevated to excellent until there is a holistic approach to how things run. When the senior staff of Visitor Services, Education, Security, Events, Retail, Theater Services, IT, HR, Café staff pull together as a team, there is always significant improvement in service and efficiency. It is recommended that an Operations Committee meet bi-weekly to review procedures, understand past challenges and plan for upcoming programs and events.

4. Communicate internally

Does everyone at the museum have the same information? Do volunteers know more about what is happening than staff? Is your staff on your mailing list? When it comes to internal communications many museums overlook the obvious – be sure the whole staff has solid up to date information. This includes information about programs, private events, and exciting new initiatives. Internal communications should be positive and gracious – and address more than just tidbits like policy changes. A balance between staff meetings and electronic communications is critical.

5. Create permanent space solutions... and include social spaces

Make sure that you have permanent places carved out for your operational needs, including welcoming and processing areas for groups, work areas for docents and volunteers, clearly marked storage for shared supplies, lockers for employee belongings, etc. Take a quick internal poll via email – ask employees “What are our most pressing space issues? What items are you constantly reorganizing, losing or making provisions for? What ‘workarounds’ are not working?”

Most importantly, more and more visitors are using museums as a place to connect socially with friends and family. It is critical to create an environment to foster these desires. Social spaces range from extended public seating, to bars and cafés, to balconies with special views.

6. Consolidate and systematize management reporting

All too often the right kind of management reports aren’t developed or circulated. Having a good reporting system with performance metrics in place allows for each area of the museum to be effectively monitored. All department heads should understand costs and revenue on a month-to-month basis. They should know how this stacks up against other years and months, and how they are tracking against the annual budget. They should create a version of their budget that is fully loaded with staff time and soft costs so that budgets can be carefully evaluated for efficiency and strategic choices can be made.

7. Let go of something – or many things...

Do fewer things better. Every museum can afford to drop at least one program or idea that is outmoded or fails to connect with an audience. Evaluate all programming against criteria based on institutional goals. By

letting go of underperforming programs, limited resources can be applied to areas of greater impact.

8. Make new technology work for you

Identify the role that new technology will play in transformation. There are implications for almost every area of the institution, from digital asset management to Visitor Services to External Affairs. For example, the Marketing Department will benefit from LaPlaca Cohen's Culture Track 2007 study which revealed that 58% of frequent attendees now use email to help decide what to attend, 74% use the Internet to prepare for their visit, and over 50% of visitors are purchasing tickets online.

9. Create working groups with other institutions – even if you think they are competitors

Cultural institutions always see more visitors when they are clustered or in close proximity to one another. When museums work together rather than seeing each other as competitors, they are able to realize dramatic change. Sharing data such as attendance and revenue on a quarterly basis is helpful in understanding patterns and visitor responses to various types of programming. Deeper relationships such as co-programming or coordination of marketing materials, promotions and event calendars have been extremely positive for many museums. Regardless, of the level of interaction, managing relationships is crucial and a simple letter of agreement outlining roles and responsibilities and budgets will go a long way.

Exhibition Management (Jessica Ludwig)

10. Develop an exhibition calendar that meets your institution's needs

The goals of a calendar will be different for different institutions, but a planning calendar is a key document for all museums. A successful calendar will give departments the information they need to do their jobs on time, help managers maximize resources, be easy to read and understand, and be made widely available to all museum employees.

11. Make key players stakeholders in the exhibition budget

Give each department incurring costs on a project real input into its budget. Build budgets "bottom-up", providing training as necessary to ensure effective estimating. Make sure staff members are responsible for tracking costs and reviewing final actuals versus budget figures so they continuously improve their budgeting skills.

12. Begin budgeting earlier than "comfortable"

Understandably, people are often hesitant to provide estimates before a clear project scope has been established. However, the budget process almost always needs to begin before the details are in place. Work with key players to formulate assumptions and then clearly articulate what should be estimated. This frees staff up to provide valuable input without hesitation.

13. When dealing with potential overages, ask questions

A project manager's dictating solutions to overages does not build consensus, nor does it capture the expertise of museum staff. When faced with the difficult task of trimming costs on projects that your colleagues will invariably be invested in, the best thing a manager can do is ask, "how would you handle this?"

14. Guard your contingency

It is tempting to reduce or eliminate a budget's contingency to allow for a more ambitious exhibition, rationalizing that the exhibition is so well planned that it won't have any unexpected expenses. Resist this temptation! Unforeseens are exactly that: unforeseen.

15. Actively facilitate communications

Unless you have clear proof, don't assume exhibition communication is happening effectively. Take action to promote strong communication through: 1) regular production meetings, 2) shared files with key exhibition information, and 3) contact sheets and introductions. Know when to encourage people to stop emailing and discuss issues in phone or in person.

16. Integrate outside contractors into your process

When working with outside contractors, be sure to integrate them smoothly into museum functions by clearly defining their role, providing them with a single point of contact at the museum and asking them to attend the appropriate production meetings.

17. Have a clear process in place for conflicts

Sometimes worse than a conflict is the frustration someone feels when there is no clear path to a resolution. Examine your exhibition processes to assess where there might be "authority blockages" and take steps to articulate clear paths to decisions. In particular, think about how problems should be solved on the floor during the busy installation and de-installation periods.

18. Work with your building, not against it

Exhibition designs are most successful and cost-effective when they work with, not against, the existing gallery architecture. Scrutinize plans to see if a design element is really adding to the exhibition; often it is only adding a design statement.

19. Never underestimate the visitor

Even the best planning cannot completely predict how visitors will interact with an exhibition. Make sure critical staff is onsite and available for the first few weeks after an exhibition's opening to troubleshoot and make any necessary adjustments to the exhibition's operations or design.

20. Partner with other institutions

Co-organizing or traveling exhibitions is an obvious and effective way to contain costs and generate revenue, but there are other ways of partnering with other institutions or individuals to create mutually beneficial situations. Be on the active lookout for such opportunities.

21. Learn from other institutions

When you partner with other institutions, take the opportunity to learn about their exhibition processes and costs. Ask to see their budget and contract templates and inquire about their staffing structure. If you see a system that works well, tailor it to work for your own institution.

Education and Public Programs (Sonnet Takahisa)

22. Use staff to conduct visitor research

They can gather survey data, observe and track visitors in galleries, and administer follow-up questionnaires. This gets all staff interacting with visitors in an authentic way. This saves money on hiring data collectors.

- 23. Assign mid-level and senior staff to weekend floor duty**
No catching up on email or filing – they should be front and center greeting guests in the lobby, answering questions in galleries, and directing traffic.
- 24. Organize staff morale field trips to other museums and cultural sites, including zoos, galleries, and botanic gardens**
These kinds of cultural excursions provide an opportunity for staff to bond with one another, but also establish a common vocabulary of visitor experience.
- 25. Encourage senior staff and board members to serve as a chaperone and bring a school group for a museum visit**
Also give staff members paid-time off to be a class parent on a field trip their child takes to another museum. Ask staff and board members to report back on the highpoints and low points of the experience (including transportation, bathroom breaks, food/ snack breaks, and, oh yes, the gallery/ learning experience).
- 26. Invite students from one of your school or youth partnerships to present at a Board Meeting or a meeting with funders**
Young people will steal the show. However, the real take-aways are powerful: Board Members and funders can see the diversity of the student populations that you serve, recognize the power of young voices, and witness the way that the next generation is actively engaged with your institution. Of course, such a presentation reflects well on the education programming and staff.
- 27. Offer your museum for community meetings**
Local community groups, school boards, and interfaith groups – are always looking for “neutral” space to meet. Hosting a meeting at your site gives you a chance to be part of their community, and a chance to share the kinds of resources and opportunities you have to offer.
- 28. Invite local celebrities to do a walk-through of your exhibitions**
Record their thoughts and impressions for a downloadable audio tour or a publishable blog that offers visitors new and unexpected perspectives on your collections and exhibitions.
- 29. Design intergenerational programs that encourage parents/grandparents and children to talk to one another about what they are seeing in your institution.**
Families are looking for constructive activities, particularly for early childhood audiences. Make sure that the programs reinforce the value of practicing observation and response strategies in the museum setting, and that these are easily transferable to the content-rich environment of our world.
- 30. In this world of 21st-century skills acquisitions, remember the strength of our institutions as purveyors of some useful 19th-century skills**
We are places that encourage people to slow down, to look longer, to come back and find both the new and the familiar. Celebrate the fact that our institutions provide opportunities to engage with collections, exhibitions and fellow visitors over time and through generations.
- 31. Partner with fewer groups and go deeper**
While ticket counts and admissions statistics will always be important, a true, long-standing collaboration with one or two groups will afford honest

feedback about all aspects of your educational programming. Work with a school, a youth group, a community organization, and invite them to samples of your public programming, teacher training, family activities and get them to feel invested in your success

32. If you want to work with a school, know that the best time to have a conversation with a school leader is early in the morning, before teachers and students arrive

If you want to understand the teaching and learning issues, invite yourself as a listener at a teacher roundtable about student data and work, or offer to be a reviewer for student portfolio presentations. Use those experiences to propose thoughtful ways that your resources can specifically support students' strengths and challenges.

33. Create an advisory board of diverse stakeholders in your educational and public programming

An adjunct to the Board of Trustees, who has fiduciary responsibility, use this group as a think tank and safe space for testing ideas, getting external support for your programs and as a way to broaden the reach to a wider range of audiences.

34. Use staff meetings as an opportunity for everyone on staff to become familiar with and actually have an educational experience

Either by leading a gallery experience/workshop during the all-staff time, or inviting everyone to participate in a scavenger hunt on your website to find interesting facts and program information.

35. Establish no email Fridays!

Use it as a day to have face-to-face encounters, or at least phone conversations with colleagues. You may find that what you lose in efficiency, you gain in trust, relationships and shared understandings about ideas, projects and next steps.

Development (Bill Simmons)

36. Write not to ask for money

Your donors are wondering how your museum is weathering the storm. A thoughtful letter from your director or Board Chair will give them an 'insider' perspective on the steps you're taking to ensure continuity, quality and service, keeping the faith with the donors and members who made your museum a success.

37. Start survey/stewardship dialogues

Market surveys among your friends are a great way to keep your museum at the top of people's minds; they appreciate being asked their views on what's important to them culturally and how well your museum is meeting their needs.

38. Hold parlor meetings

Ask your Board members to host informal gatherings of key stakeholders to share some time (and a cocktail) with your Director, curators, and others they probably don't get to spend much time with in normal times. It's a good way to keep Board members engaged by doing something they enjoy anyway.

39. Assess volunteer roles and structure

Invite your Board to use the crisis to revisit its mission, commitment, personal and collective expectations of Board membership, and the quality of their volunteer experience at the museum, personal philanthropic priorities, and aspirations for the museum in the future.

40. Evaluate events

With budgets tight, it's a great time to have a look at your yearly calendar of events to see which still make sense (and money), and which you do just because you've always done them. Some legacy events burn staff time with little return; a crisis is a good excuse to faze them out.

41. Make friends with your curoeducators

Never get quality time with your program professionals? They have the same complaint. Take this opportunity to reintroduce yourselves and your jobs as development officers, and explore ways you can work together better in good times and bad. (Hint: curators and educators like beer.)

42. Re-focus on your case for support

In crises, donors don't tend to reduce their gifts to all their charities; they reduce the list of charities they support. To make sure we stay above the fold on our friends' philanthropic priority lists, revisit the core reasons why donors should support us, and reinvigorate our case if it's gotten stale.

43. Analyze your database

A good scrubbing of your database is a little money well spent. Strategic marketing and fundraising require that we mine our data and segment our donor base to make sure we're paying attention to the most promising prospects.

44. Assess annual fund and membership

If we find our annual support base softening in this economy, it's worth testing new messaging and benefit offerings, especially in attracting young members who don't respond to traditional solicitation channels. Use focus groups to assess the perceived value of what you're offering to young members.

45. Assess brand synchronicity

It's easy to forget that development isn't just fundraising – it's a channel of strategic communication that should project and reinforce the museum's brand. Review your whole communications program to make sure you're leveraging your museum's hard-earned brand equity.

46. Look beyond the crisis

Short-term crises are long-term opportunities to make changes you otherwise wouldn't bother making. If you have to reduce staff, don't assume you'll fill the same positions the same way; imagine you have the opportunity to reinvent your business model (because you do).

47. Don't stop asking

The one sure thing in a crisis is that your fundraising will drop like a rock if you stop asking your donors for money. Acknowledge the challenging circumstances, remind donors that you need their support more than ever just now, and focus on sustainable excellence once the storm clouds pass.

Marketing and Public Relations (Amy Shearer)

48. Marketing starts at home

- Begin your market research with colleagues and peers in your organization (not necessarily within the marketing/communications department).
- You will gain valuable insight into what is confusing to people and what is resonating. Another group of eyes will also pick up on forgotten details that may be important to an external audience (but marketing eyes took for granted).

49. Does your message even make sense?

- Biggest mistake people make: assume people know what you're talking about.
- Often we are too close to a topic or event and tend to use "internal speak" or look through an "internal lens" which may be unclear or those hearing the message externally.
- Test messaging with your potential audience before you sink money into it.

50. What's Up?

- Make sure you're effectively communicating "what's next" for your organization.
- Take an inventory of upcoming events and exhibits as well as all publications, email communications, and possible paid advertising you have in queue – map them out on a calendar.
- This will allow you to clearly see what you can pre-promote and through which outlets it makes sense to do so.

51. Giving the Gift of Time...

- Remember, people are giving gifts all the time: birthdays, anniversaries, and weddings.
- Are you using everything in your arsenal to make people aware that the experience you offer is a gift in and of itself?
- Gifting the experience accomplishes a couple of things:
 - You receive revenue up front
 - If the presentation is done correctly, the receiver will consider gifting it as well in the future
 - You may be able to convert the receiver into a member or donor

52. Free on your birthday!

- Most people don't spend birthdays by themselves, so if you can entice someone to come for their birthday, others will follow.
- Word will get out and others will want to try it – it's something different.
- If your property has a restaurant onsite, lunch or dinner reservations would be a great up sell.
- Put controls in place to avoid shrinkage. Pre-register online and bring birth certificate or drivers license for verification.

53. Conduct a collateral audit...yep, the dreaded audit

- Sometimes people are so busy they don't have the time to coordinate properly with colleagues, which can lead to departments operating their own mini businesses within the organization. The result? PRINT OVERKILL.

- Do a full survey of all print communications. In all likelihood, you will find overlap and possible ways of combining efforts and streamlining materials.
- You may even see ways to save time, money, and paper by converting things to e-communications.

54. Leverage video

- Video is growing in importance on the web – even Google is beginning to return videos as results for search queries.
- If you don't have the equipment, time or money to produce your own video, create a "channel" on You tube that will help you capture guest-generated videos to share with the world.

55. Rock of ages... intergenerational promoting

- Intergenerational connections are magic and our organizations offer experience that can be shared by young and old.
- Too often, we think we know our audience and we cannot stray from that profile. While still reaching your core constituency, find ways to bring kids, parents, and grandparents together.
 - Class or course in art, music, or the sciences
 - Take something you already offer such as a family membership and re-package it as a grandparent membership

56. Everyone wants to feel special

- Think of new ways to offer exclusive moments for current and potential visitors.
- Increase accessibility by offering special admission times early in the morning or into the evening. Let people have their own "special" time at your institution.
- Design a program where guests can meet the artist, curator, or director for a more personal encounter with your organization.
- Try something new once in awhile - Find a way to incorporate unexpected programming into your program calendar. If nothing else, it will peak interest and keep 'em guessing.
- Even if you're not a music venue, try reaching new and existing audiences with a specially- ticketed event such as a concert or performance.
- Opportunities for food and beverage and gift shop sales.
- And...Don't forget to tell them what's coming up next (point #2).

57. Maximize value-added offers with your media partners

- When making your media buys, make sure you know the full array of value added opportunities available to you.
- Are you participating in ticket giveaways with radio venues to gain added exposure?
- When working with anyone – television, print, radio, movie theatres...anyone...make sure you are getting exposure on their websites.
- With the economy affecting advertising revenue streams for media outlets, now's the time to ask for more space for your dollar or additional runs for the same price.

58. Don't forget to talk to the community

- We are often trying to stretch dollars in an effort to reach the masses and while doing that we sometimes miss a niche of people that would be particularly interested in a topic, event, or exhibit.
- Use electronic communications, outreach tables at community events, or low cost printing options to make sure you reach specific groups of people that would be interested in your offering:
 - religious organizations, educational institutions, social groups: women's groups, issue-related groups
- When a group of people unite for a common reason and you have an offering that would appeal to that reason, don't forget to let them know about it. They will spread the word.

59. You won't know unless you ask

- Do you know what people's perceptions of you before they have their experience AND did you deliver on what they thought they were going to get?
- If you promise a certain experience in your marketing, you better make sure you deliver on that promise.
- Ask your customers about their expectations as well as what they thought of the experience
 - Entrance surveys – what are your perceptions and expectations – why did you choose to come – what excited you to visit.
 - Exit surveys – did we meet your expectations via the experience and amenities – what will you tell others about your experience – what will bring you back
 - Post-visit communication with feedback options

60. Never forget: You are selling an experience