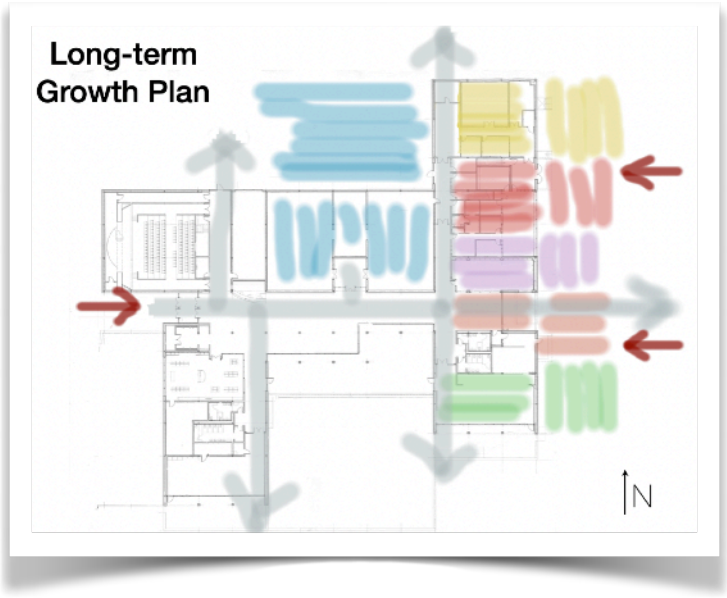
# Our Work Process

Ask anyone in the museum field, and they will likely tell you that no two museums are precisely alike. Museums differ in their collections, public engagement, exhibitions, programs, and financial circumstances. Museum Insights responds to the extraordinary breadth and depth within the field with a flexible planning process that recognizes each museum's specific needs and responds to what we and our clients have learned through the planning process. The end result of our work is a plan that puts the museum on course towards long-term, transformative change. The next pages outline our work process.

**Museum Insights responds to the extraordinary breadth and depth of the museum field with a flexible planning process that responds to each museum's needs and resources.**

## Discovery

**Research:** We begin every project with a comprehensive effort to understand each museum's past successes and challenges along with its present position. We review all aspects of the museum's operations including financial statements, floor plans, prior planning documents, collection policies, program planning, board documents, and press coverage.



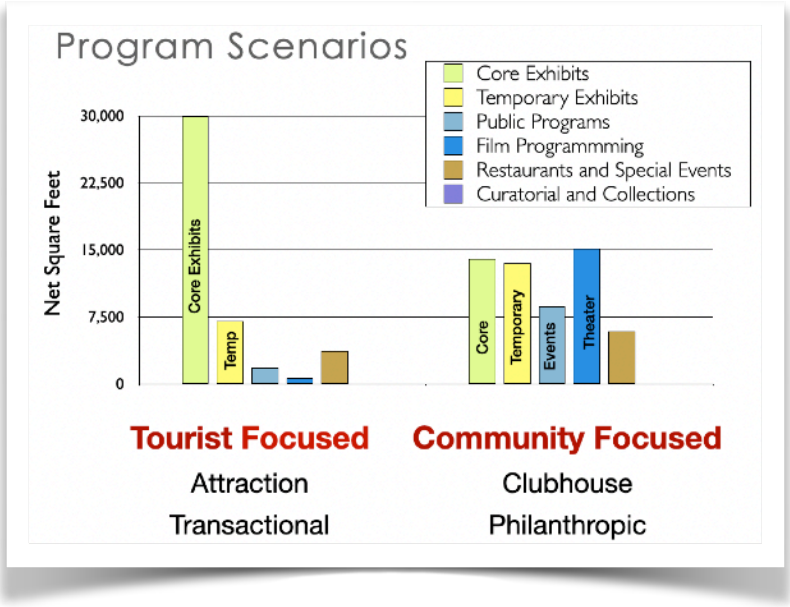

These documents help us understand how the museum reached its current state, and what ideas, directions, and initiatives have shaped the museum in the past. Based on this research, we sometimes conduct additional research into the history of the organization. For example, we researched and developed profiles for the eleven properties managed by *Connecticut Landmarks* that detailed their history, management, finances, and attendance. In other cases, such as the *Emily Dickinson Museum*, we dug deeper to understand Emily Dickinson's life and the history of the family in Amherst, especially its past and current ties to Amherst College.

**Site Visit:** In addition to documentary research, we conduct multi-day site visits. These visits are key to giving us the context to understand the ethos of the place and the constraints and opportunities within current facilities and land that are not always evident on a map or building plan. A walk through Edgartown, as part of work with the *Martha's Vineyard Museum*, revealed how inconsistent

branding and signage hindered visitors from connecting a popular lighthouse operated by the museum with the museum itself. In another case, the difficulty in finding parking for a site visit brought home to us how frequently this challenged the museum's staff and visitors.

**Stakeholder Interviews and Listening Sessions:** During and after the site visit, we conduct one-on-one interviews with key stakeholders, supporters, board members, staff, and volunteers. Through these confidential interviews, we learn why these individuals care about the museum and what they envision for the future. We often hear about the most critical issues facing the museum, possible solutions, and the web of connections among the museum, its board, and its community.

Understanding the museum's stakeholders is important, because their support will be critical to effecting change. Interviews also give us unparalleled insight into how an organization works; during our work with the *National Coast Guard Museum*, our interviews gave us valuable understanding of the chain of command and the museum's challenge to find its place within the large and diverse command structure of the United States Coast Guard. Perhaps most important, these interviews help us understand the scale and nature of change that is possible for each museum.




**Benchmarking:** Based on what we've learned from our research and interviews, we select a number of museums and organizations that reflect different aspects of the client's mission and operations to benchmark. This research results in a description of each organization's programs, operations, mission, and finances, creating a snapshot of what makes that museum or organization successful. Benchmarking is a first test of our understanding of the client museum's mission and key operations.

Sometimes, as in our work with *History Cambridge*, the client's strong response to benchmarked traditional historical societies changed the project's direction and resulted in a bold, forward looking plan.

In other cases, benchmarking has been one of the most important outcomes of the work. During the development of a business plan for a proposed collection storage center at the National Park Service's *Fort Vancouver National Historic Site*, benchmarking of other National Park Service collection facilities provided important insights. While all the facilities were successful, they were managed

with very different funding and operating models. This information provided Fort Vancouver with new ideas about how to make their facility work operationally and financially and changed their approach to the anticipated multi-year collection storage project.

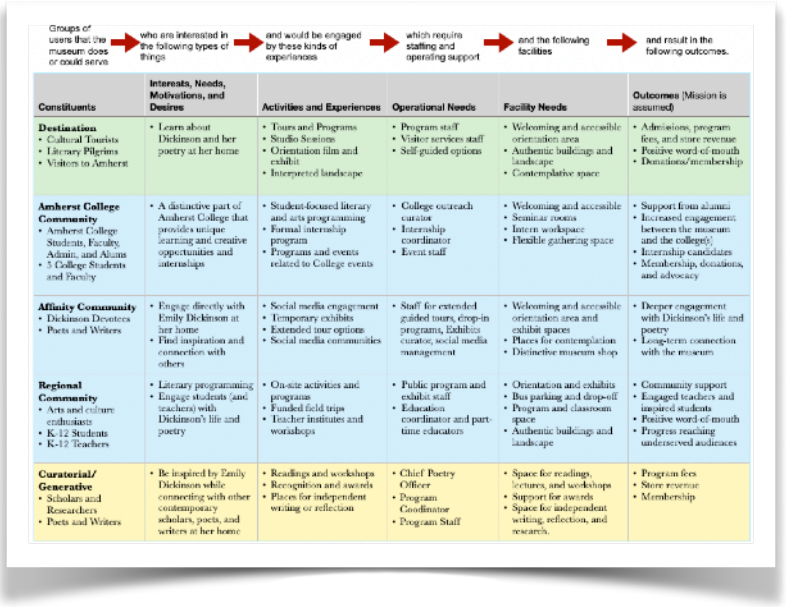
**Resources, Constraints, Opportunities, and Challenges:** This analysis provides a framework for the recommendations to follow. It outlines the resources that will move the museum forward and the things that may restrict or redirect efforts at change. Overall, it provides a concise look at the museum's current state of affairs and the issues that may need to be addressed in the planning .

**Issues and Concerns:** In some cases, like the *Eric Carle Museum of Picture Book Art,* where Museum Insights was brought in to address recognized facility and operational challenges, we develop a second document, Issues and Concerns. This document outlines the known issues identified by staff, board, and stakeholders, and adds other concerns identified by Museum Insights during the Discovery process.Taken together, these studies provide an initial foundation for architects and other facility consultants to begin to develop integrated solutions.

## Constituent Logic Model

### Constituent Identification

Based on our discovery work, we develop a list of all of the museum's current and potential constituent groups. These include typical museum constituents such as K-12 students, visiting friends and relatives, and local community members and other, more specialized groups, based on each museum's unique circumstances. In the past, these specialized groups have included "Museum Mile Museum Goers," "Island Philanthropists," "RVers," "Three Generation Families," "Pilgrims," "Historic House Lovers," "Dickinson Devotees," and dozens of others unique to each project.



Groups of users that the museum does or could serve → who are interested in the following types of things → and would be engaged by these kinds of experiences → which require staffing and operating support → and the following facilities → and result in the following outcomes.

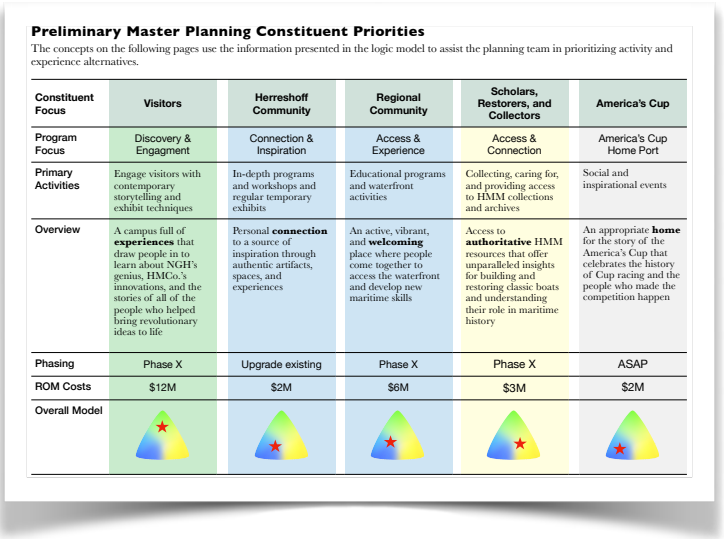
| Constituents | Interests, Needs, Motivations, and Desires | Activities and Experiences | Operational Needs | Facility Needs | Outcomes (Mission is assumed) |
|---|---|---|---|---|---|
| **Destination**<br>• Cultural Tourists<br>• Literary Pilgrims<br>• Visitors to Amherst | • Learn about Dickinson and her poetry at her home | • Tours and Programs<br>• Studio Sessions<br>• Orientation film and exhibit<br>• Interpreted landscape | • Program staff<br>• Visitor services staff<br>• Self-guided options | • Welcoming and accessible orientation area<br>• Authentic buildings and landscape<br>• Contemplative space | • Admissions, program fees, and store revenue<br>• Positive word-of-mouth<br>• Donations/membership |
| **Amherst College Community**<br>• Amherst College Students, Faculty, Admin, and Alums<br>• 5 College Students and Faculty | • A distinctive part of Amherst College that provides unique learning and creative opportunities and internships | • Student-focused literary and arts programming<br>• Formal internship program<br>• Programs and events related to College events | • College outreach curator<br>• Internship coordinator<br>• Event staff | • Welcoming and accessible<br>• Seminar rooms<br>• Intern workspace<br>• Flexible gathering space | • Support from alumni<br>• Increased engagement between the museum and the college(s)<br>• Internship candidates<br>• Membership, donations, and advocacy |
| **Affinity Community**<br>• Dickinson Devotees<br>• Poets and Writers | • Engage directly with Emily Dickinson at her home<br>• Find inspiration and connection with others | • Social media engagement<br>• Temporary exhibits<br>• Extended tour options<br>• Social media communities | • Staff for extended guided tours, drop-in programs, Exhibits curator, social media management | • Welcoming and accessible orientation area and exhibit spaces<br>• Places for contemplation<br>• Distinctive museum shop | • Deeper engagement with Dickinson's life and poetry<br>• Long-term connection with the museum |
| **Regional Community**<br>• Arts and culture enthusiasts<br>• K-12 Students<br>• K-12 Teachers | • Literary programming<br>• Engage students (and teachers) with Dickinson's life and poetry | • On-site activities and programs<br>• Funded field trips<br>• Teacher institutes and workshops | • Public program and exhibit staff<br>• Education coordinator and part-time educators | • Orientation and exhibits<br>• Bus parking and drop-off<br>• Program and classroom space<br>• Authentic buildings and landscape | • Community support<br>• Engaged teachers and inspired students<br>• Positive word-of-mouth<br>• Progress reaching underserved audiences |
| **Curatorial/ Generative**<br>• Scholars and Researchers<br>• Poets and Writers | • Be inspired by Emily Dickinson while connecting with other contemporary scholars, poets, and writers at her home | • Readings and workshops<br>• Recognition and awards<br>• Places for independent writing or reflection | • Chief Poetry Officer<br>• Program Coordinator<br>• Program Staff | • Space for readings, lectures, and workshops<br>• Support for awards<br>• Space for independent writing, reflection, and research. | • Program fees<br>• Store revenue<br>• Membership |

For each of the identified groups, we outline their interests, needs, motivations, and desires. These then inform the current and potential activities and experiences that the museum could undertake to serve each group, which in turn inform staffing, operation and facility needs and result in specific outcomes related to both the museum's mission, and its financial foundations.

## Prioritizing and Grouping Constituents

The resulting logic model provides a comprehensive way to assess who the museum *could* serve. We use it in a workshop with the museum's planning team, to help them identify and prioritize the groups and outcomes that best fit the museum's mission and vision. Often, it is readily apparent after reviewing the model which groups are critical and which are less important to serve well.

We then divide the constituents into three categories to identify commonalities in the museum's activities and experiences. We label these three categories Destination, Community, and Curatorial. Typically, a museum's *Destination constituents* (green) are looking for a unique and engaging experience and often visit only once. *Community constituents* (blue) have the potential for a continuing, regular relationship with the museum through a wide variety of activities and programs. *Curatorial constituents* (yellow) are usually most interested in a museum's collections and their preservation and growth.



**Preliminary Master Planning Constituent Priorities**

The concepts on the following pages use the information presented in the logic model to assist the planning team in prioritizing activity and experience alternatives.

| Constituent Focus | Visitors | Herreshoff Community | Regional Community | Scholars, Restorers, and Collectors | America's Cup |
|---|---|---|---|---|---|
| Program Focus | Discovery & Engagment | Connection & Inspiration | Access & Experience | Access & Connection | America's Cup Home Port |
| Primary Activities | Engage visitors with contemporary storytelling and exhibit techniques | In-depth programs and workshops and regular temporary exhibits | Educational programs and waterfront activities | Collecting, caring for, and providing access to HMM collections and archives | Social and inspirational events |
| Overview | A campus full of **experiences** that draw people in to learn about NGH's genius, HMCo.'s innovations, and the stories of all of the people who helped bring revolutionary ideas to life | Personal **connection** to a source of inspiration through authentic artifacts, spaces, and experiences | An active, vibrant, and **welcoming** place where people come together to access the waterfront and develop new maritime skills | Access to **authoritative** HMM resources that offer unparalleled insights for building and restoring classic boats and understanding their role in maritime history | An appropriate **home** for the story of the America's Cup that celebrates the history of Cup racing and the people who made the competition happen |
| Phasing | Phase X | Upgrade existing | Phase X | Phase X | ASAP |
| ROM Costs | $12M | $2M | $6M | $3M | $2M |
| Overall Model | | | | | |

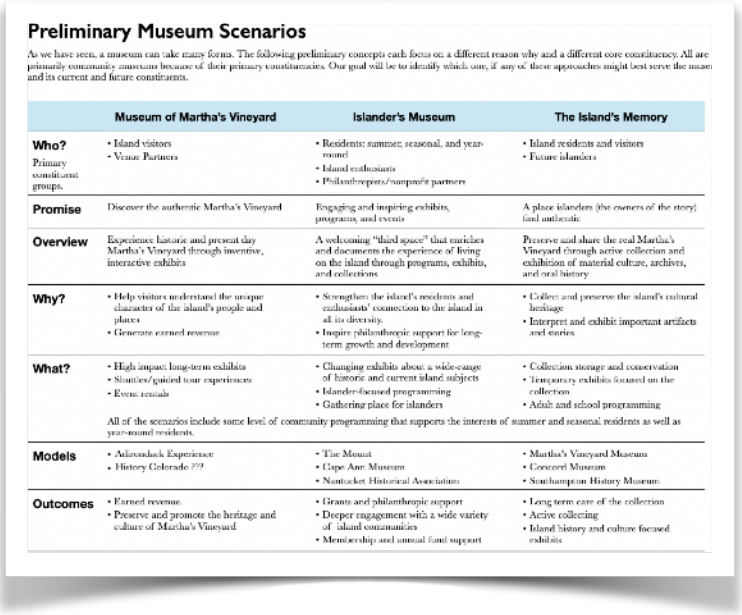
By grouping constituents together in this way, we can see the links between prioritized groups and discover both programmatic priorities and operational efficiencies. When the New York Academy of Medicine, located on New York City's Museum Mile, sought to transition to a more public facing organization, providing public health education to neighboring Spanish Harlem was a very strong priority. Our constituent analysis helped them see that serving Museum Mile museum-goers could provide needed revenues to support and expand their public health outreach work. Serving tourists could help them more effectively meet the needs of their neighboring community.

## But, shouldn't museums serve everyone?

Museums certainly *welcome* everyone! But if there is one lesson from all the planning work we have done, it is that no single museum can effectively serve "everyone." Our process ensures that the museum identifies and prioritizes groups where it can have the greatest impact, while also identifying other groups that can provide vital support for the museum's work. Understanding the ways that each group can both benefit from and provide support to the museum is at the heart of this planning process.

### Scenarios

Sometimes, the path forward is clear once constituents are prioritized. In other cases, the path is not so clear. In this case, we work with the museum to develop multiple scenarios to understand the programmatic outcomes and the financial impacts of prioritizing differing groups. Each scenario outlines priority constituents, and the museum components that would best fulfill those group's interests, needs, motivations and desires. We review, debate, and horse trade the scenarios with the museum's planning team until we reach consensus about the best path forward, typically drawn from one or more of the scenarios that we have developed.



**Preliminary Museum Scenarios**

As we have seen, a museum can take many forms. The following preliminary concepts each focus on a different reason why and a different core constituency. All are primarily community museums because of their primary constituencies. Our goal will be to identify which one, if any of these approaches might best serve the muse and its current and future constituents.

| | Museum of Martha's Vineyard | Islander's Museum | The Island's Memory |
|---|---|---|---|
| **Who?** Primary constituent groups. | • Island visitors<br>• Venue Partners | • Residents: summer, seasonal, and year-round<br>• Island enthusiasts<br>• Philanthropists/nonprofit partners | • Island residents and visitors<br>• Future islanders |
| **Promise** | Discover the authentic Martha's Vineyard | Engaging and inspiring exhibits, programs, and events | A place islanders (the owners of the story) find authentic |
| **Overview** | Experience historic and present day Martha's Vineyard through inventive, interactive exhibits | A welcoming "third space" that enriches and documents the experience of living on the island through programs, exhibits, and collections | Preserve and share the real Martha's Vineyard through active collection and exhibition of material culture, archives, and oral history |
| **Why?** | • Help visitors understand the unique character of the island's people and places<br>• Generate earned revenue | • Strengthen the island's residents and enthusiasts' connection to the island in all its diversity.<br>• Inspire philanthropic support for long-term growth and development | • Collect and preserve the island's cultural heritage<br>• Interpret and exhibit important artifacts and stories |
| **What?** | • High impact, long-term exhibits<br>• Shuttles/guided tour experiences<br>• Event rentals | • Changing exhibits about a wide-range of historic and current island subjects<br>• Islander-focused programming<br>• Gathering place for islanders | • Collection storage and conservation<br>• Temporary exhibits focused on the collection<br>• Adult and school programming |
| | All of the scenarios include some level of community programming that supports the interests of summer and seasonal residents as well as year-round residents. | | |
| **Models** | • Adirondack Experience<br>• History Colorado ??? | • The Mount<br>• Cape Ann Museum<br>• Nantucket Historical Association | • Martha's Vineyard Museum<br>• Concord Museum<br>• Southampton History Museum |
| **Outcomes** | • Earned revenue.<br>• Preserve and promote the heritage and culture of Martha's Vineyard | • Grants and philanthropic support<br>• Deeper engagement with a wide variety of island communities<br>• Membership and annual fund support | • Long term care of the collection<br>• Active collecting<br>• Island history and culture focused exhibits |

## Activity, Program, Facility, and Business Planning

Discussion of the logic model's priorities and the scenario analysis of the museum's potential futures gives us clear direction for the detailed work of program, facility, and business planning that is the next phase of this work. We now have the information that we need to flesh out the details of the master plan.

### Activity and Experience Plan

Activities and experiences are the core of the museums work. They vary dramatically depending on the museum's constituents, but most often include temporary and long-term exhibits, a wide variety of programs based on constituent needs, programs, and the related operational and facility needs for each component. Building on the Activity and Experience Plan, we prepare a **Facility Plan** that identifies the spaces needed for the proposed activities and estimated construction costs.

A **Museum Business Plan**, including a staffing model and an operating budget that outlines the new or updated facility's revenue and expenses. This work is developed based on existing budgets, our experience with similar projects, and close work with the executive director, development staff, finance team, and other appropriate members of the staff and board. Together these documents form a solid foundation for the museum's sustainable growth and development.

## Final Report

The final report draws together the key threads of the planning process and presents the decisions and outcomes as clear, actionable plans.

We take pride in the fact that our plans don't sit on the shelf. Our clients use them to create transformative change.

I thought we had the answers. It was the questions we had wrong.

— Bono