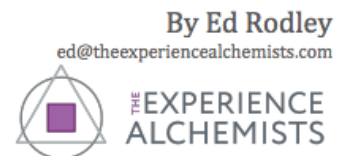


Texas Association of Museums White Paper  
August 2022

# FINAL REPORT:

## Finding Alternative Futures 2 (FAF2)



## Executive Summary

This report summarizes the work undertaken by The Texas Association of Museums<sup>1</sup>, as part of the Finding Alternative Futures, Phase 2 (FAF 2)<sup>2</sup> project. This report by The Experience Alchemists<sup>3</sup> with expert assistance from ExposeYourMuseum<sup>4</sup> LLC is a consolidation and distillation of the white papers produced for FAF2, with additional information on the final module and the evaluation done on the program. If you've been reading along over the course of the project, you might want to skip straight to Module 5. Even if you have all the other white papers, we thought it worthwhile to have a single document that contained all the work done over the course of the project that can stand as the definitive final paper that describes what happened, what the larger context was that it happened within, and finally, how it was received by everyone who took part in the project. We hope it will be useful aid for museums in Texas and beyond looking for suggestions on how they might brainstorm alternative futures for their organizations that are vibrant and relevant to the communities they serve.

## Introduction

In 2021-2022, the Texas Association of Museums designed and facilitated “Finding Alternative Futures, Phase 2.” The project provided professional development to address digital readiness and technologies through the support of a cohort model and one-on-one coaching. Ten Houston-area museums participated. The program, known as FAF2, focused on the following topics as key learning modules: 1) online programming, 2) operational capacity and continuity, 3) community engagement, and 4) digital savvy leadership. Each module leveraged expert facilitators, who created accessible, online content (e.g., training videos, slides, and handouts) which museum

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<sup>1</sup> <https://www.tam.org/>

<sup>2</sup> <https://www.tam.org/faf2/>

<sup>3</sup> <https://theexperiencealchemists.com/>

<sup>4</sup> <https://exposeyourmuseum.com/>

participants could access asynchronously via Google Classroom. Near the close of the 15-month program, each participating museum applied for and received a \$2,500 stipend to execute a project related to the learning modules. Evaluation of the program occurred throughout and is summarized in a separate evaluation report.

## **Module 2: Museums and Online programming<sup>5</sup>**

### **Course Content**

Our concept of “museum visitor” now includes those who may never come to our museum grounds. Understanding how your museum might meet the needs and interests of these unseen, unknown visitors requires new approaches to programming. Knowing the range of experiences that can be supported effectively through digital means is also key.

### **Skills and Competencies:**

- Analyzing data to understand your public’s needs
- Identifying digital trendsetters and watering holes
- Understanding the urgent needs of Education (K-18) and the platforms they frequent
- Developing symbiotic relationships with compatible online entities.

### **Larger Context**

The dramatic increase in museums offering digital programming over the course of the pandemic is easy to understand. The format was relatively easy to translate into online versions and keeping museums’ presence in front of visitors when nobody could come and visit museum buildings was seen as vital to survival. What many museums

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<sup>5</sup> Module 1 was an introductory module.

undertook as a short-term coping mechanism “until things return to normal” though, is set to become a core part of the new reality.

Our concept of “museum visitor” now includes people who may never come to our facilities, and the popularity of online programming and the extended reach that these digital programs provide will continue to drive audience interest in, and support of museums. Ellen Busch, the Director of Historic Sites Operations at the Texas Historical Commission, summed up the role that online audiences have to play,

*“Not everybody is going to be able to visit our historic sites, but we need their buy-in on their continued preservation. There are so many cultural sites in this world that need people’s advocacy and support for their continued existence. And what better way to do that than through the internet and through building our digital assets?”*

To capitalize on that, we need to understand how to meet the needs and interests of these unseen, unknown visitors. This will require new approaches to programming. So early on, we looked at online programming, and what we were learning about what successful programming looks like.

## The whys and hows of online programming

You can’t always use old know-how to solve a new problem. The skills and strategies we all learned in pre-COVID times don’t necessarily hold true in the face of the massive disruption the pandemic has caused. People’s habits and practices have changed, and what you knew about how people behaved online in 2019 doesn’t really help you understand how to plan for 2021 and 2022. In [a survey of art museum directors conducted by Ithaka S+R in early 2020](#) right before the pandemic, “educational programming” was rated as the highest priority service that museums needed to provide, surpassing even displaying and studying objects. Once the shutdowns happened, online programming in most museums went into overdrive. But what

worked? Nine months into the pandemic, Cuseum conducted a survey of over 500 cultural professionals on the kinds of online programming they produced. Their report, [“The Impact of Virtual Programs on Revenue Generation for Cultural Organizations”](#), though focused on monetizing digital programs, gives a great, easy to digest breakdown of the kinds of programming organizations are offering and their relative popularity. Not surprisingly, K-12 programs and classes & events are the most popular virtual initiatives offered across all types and sizes of cultural organizations.

## Expanding reach beyond the museum’s website and social feeds

One of the Cuseum survey respondents summed up the potential of online programming this way, “Digital programming has worked well for us. We’re reaching more people than when we do the events inside the museum. We’re also finding that we’re getting a bigger audience nationally and internationally. I’m very hopeful that we’re bringing in new people who were not aware of us who would want to visit us too.”

Sounds great, right? But how to reach more than your existing audiences? One model is to invest in partnerships with organizations that offer new audiences, platforms or capacities. Over 2000 museums that have partnered with [Google Arts and Culture](#) to digitize and present their works under a single searchable, linkable site. The Metropolitan Museum of Art has partnered with [Wikipedia](#) many times over the past decade and has continued that collaboration during the pandemic. Their latest project, [The Met x Wikipedia Virtual Edit Meet-up: Women’s History Month](#), is a great example of a single program that occurs on several platforms including YouTube, Facebook, and Wikipedia. Other museums, like the Museum of Modern Art (MoMA) in New York have partnered with online learning platforms like [Coursera](#) to offer courses designed by their curatorial staff.

## Serving educational content and communication needs

There isn't room to get into the challenges facing formal education this year, but one thing that is clear is that museums have identified the school audience as a primary one for online programming, especially in the face of another possible year of no school field trips. Initiatives like [Museums for Digital Learning](#) (MDL) have aimed to fill some of that gap by offering K-12 educators online classroom resources that bring museum education into the classroom or a home-based study program. This IMLS-funded project uses digital collections-based content that is curated by the partner museums and is free to use and share. As one of their users said, *"The MDL project puts the power of authentic learning directly in the hands of teachers and students by allowing digital access to engaging resources that elevate learning through interactive and thoughtful critical thinking activities. These resources make teaching come alive in a time when many museums and collections are inaccessible to our most vulnerable students."*

MDL is an interesting model for ways museums can both partner up and flex their own internal educational muscles online. It doesn't have to be an either-or proposition. And the school audience, unlike the rest of the museum-going public, both online and off, have clear standards for what they're looking for—connection to state and/or Federal curriculum standards. This can be a huge leg up in deciding what kind of content to prioritize putting online.

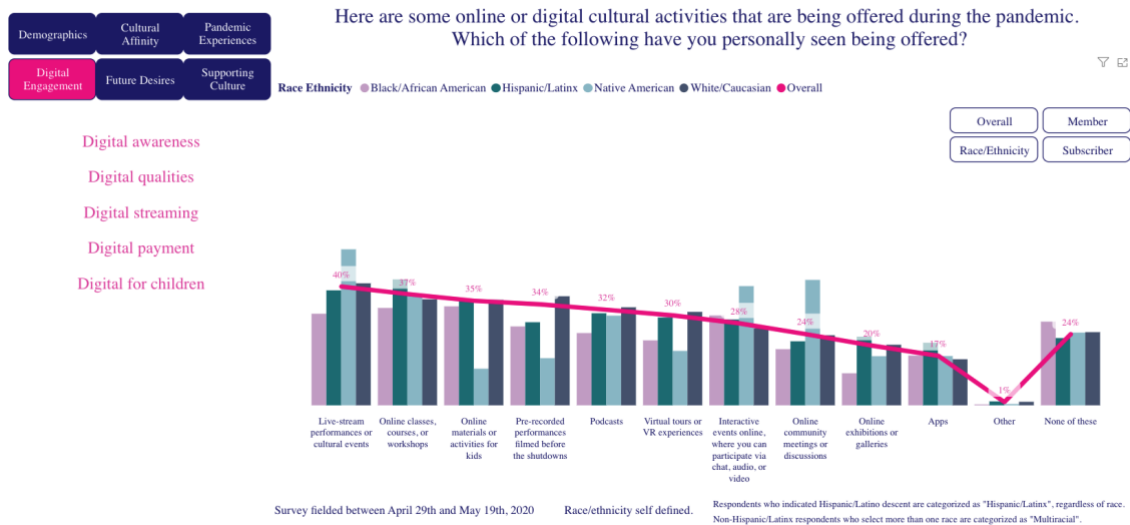
## Where to go for more

Finding information that is relevant to the current situation can be daunting, but there are many groups and organizations studying the impacts of the pandemic on cultural organizations. Here are just a couple of the ones we look to for pertinent information.

### CultureTrack

This initiative, sponsored by La Placa Cohen, has for the past decade been conducting

surveys about cultural organizations and their audiences. Their latest report, [Culture + Community in a Time of Crisis: A Special Edition of Culture Track](#), is a national research and strategy initiative to support the cultural sector and help strengthen communities around the U.S. during and after the COVID-19 crisis. Organizations of all sizes and disciplines across the country sent survey invitations to their audiences, resulting in over 120,000 survey responses from all 50 states, Washington D.C., Puerto Rico, and two Canadian Provinces. If you're looking for information about how the pandemic is shaping the field, this is a great place to get up-to-date information. They also have [an interactive tool](#) that lets you dig into the data yourself and focus on the audiences or questions that are most relevant to you.



[caption: A sample CultureTrack database query]

## AAM's Center for the Future of Museums

The Center for the Future of Museums, an initiative of AAM, works to monitor cultural, technological, political and economic trends that matter to museums. Their yearly [Trendswatch](#) report is a goldmine of information of what aAmerican museums have had to contend with over the past year. The 2021 edition: [TrendsWatch: Navigating a](#)

[Disrupted Future](#) lists “Digital Awakening: Essential technologies for pandemic survival and future success” as one of the four largest trends facing the field. As director Elizabeth Merritt says, *“The field faces a long hard slog before the pandemic fades and attendance income rebounds. Smart investments in digital practice may help sustain museums during the hard times to come and position them to rebound as the pandemic passes... How can museums make wise choices about adopting or maintaining digital technology that will help them survive in the short term and thrive in the coming decade?”*

## IMPACTS Experience

Coleen Dilenschneider of IMPACTS Experience recently published results of their [National Awareness, Attitudes, and Usage Study](#) which tracked differences in how audiences were interacting with organizations before the pandemic and during. Their key finding? More people did engage with cultural organizations online during the pandemic than they did the year before. One of the best parts of their work is that you can easily look at [all their COVID-19 reports](#) in one place, putting all the most recent information and data in your hands.

## Module 3: Museum Operational Capacity and Continuity

### Course Content

Museums must transition to digital-native and digitally enabled operations at a time when human and financial resources are especially tight. Understanding the priorities of transitioning operations, as well as how to best document policies and procedures, is essential for business continuity and resiliency.

### Skills and Competencies:

- Assembling cross-functional teams for institutional analysis



- Establishing sustainable internal communication systems
- Supporting a range of digital needs (Which ones must be met by staff members? which can be outsourced? which can be crowd-sourced? Which will attract new funding?)
- Understanding the role digital platforms play in organizational sustainability including documenting policies and procedures and developing user-friendly knowledge bases.

## Larger Context

Transitioning towards increasing digitally-enabled operations requires establishing new priorities and policies for business continuity. The necessity of having business continuity plans has become increasingly clear over the past two years, where AAM predicted 33% of U.S. museums were at risk of permanently closing<sup>6</sup>. According to the online directory Yelp, 55 percent<sup>7</sup> of the businesses that have closed since March 2020 have closed permanently. Though the dire predictions for the museum sector did not come true, there was still a 12% reduction<sup>8</sup> in the number of museums operating in the U.S. The existential threat to many organizations that this disrupted, awkwardly hybrid reality poses is still as real in 2022 as it was in early 2020 and promises to be with us for the foreseeable future. Building organizations that can weather this storm will underlie all museum operations and be the distinguishing characteristic between those museums that survive and thrive, and those that don't. Process documents for Transformation<sup>9</sup>, Collaboration<sup>10</sup>, and Closure<sup>11</sup> were key outputs in Phase 1 that Phase 2 built upon.

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<sup>6</sup><https://www.aam-us.org/2020/07/22/united-states-may-lose-one-third-of-all-museums-new-survey-shows/>

<sup>7</sup> <https://www.yelpeconomiccoverage.com/yea-q2-2020.html>

<sup>8</sup><https://www.aam-us.org/2022/02/08/national-snapshot-of-covid-19-impact-on-united-states-museums-fielded-december-2021-january-2022/>

<sup>9</sup> [https://assets.noviams.com/novi-file-uploads/tam/FAF/FAF\\_Process\\_Doc\\_Museum\\_Transformations.pdf](https://assets.noviams.com/novi-file-uploads/tam/FAF/FAF_Process_Doc_Museum_Transformations.pdf)

<sup>10</sup> [https://assets.noviams.com/novi-file-uploads/tam/FAF/FAF\\_Process\\_Doc\\_Collaboration.pdf](https://assets.noviams.com/novi-file-uploads/tam/FAF/FAF_Process_Doc_Collaboration.pdf)

<sup>11</sup> [https://assets.noviams.com/novi-file-uploads/tam/FAF/FAF\\_Process\\_Doc\\_Closing.pdf](https://assets.noviams.com/novi-file-uploads/tam/FAF/FAF_Process_Doc_Closing.pdf)

## COVID-19 highlighted existing problems in museums

The dynamics underlying museums' ongoing process of digital transformation were complicated even before 2020, and largely driven by pre-existing conditions (systemic and internal) and organizational agility, or the lack thereof. As the Knight Foundation found in 2021<sup>12</sup> In their *“Digital Transformation: An Assessment of Grants Supporting Digital Staff in Museums”* report, the majority of museums surveyed had inadequate digital infrastructures to support the kind of work they wanted to do. Coupled with this was the issue of “technical debt”, the hidden cost of prioritizing short-term productivity gains, like adopting a “free” software platform, allowing digital systems and platforms to proliferate within silos without an institutional strategy, or building a standalone digital product with no plan to maintain and upgrade it. The abrupt closure of physical facilities in the face of the pandemic, and the resulting business need to move operations online virtually overnight found the sector largely unprepared.

A good example of how many museums reacted to this sea change can be found in an article written by museum strategist Robert Weisberg. *“The Program Follows the Culture”: How Museums Used Workplace Tech Over Lockdowns*<sup>13</sup> explored the responses of three North American museums to the pandemic and highlighted some of these common pain points. The inadequacy of legacy systems to allow remote work combined with the proliferation of non-interoperable systems were major obstacles to museums continuing operations. One of the most common responses was the rapid adoption of cloud-based apps like Google Suite and Zoom, which were especially useful for hybrid teams. As Jennifer Foley, Deputy Director for Collections and Engagement at the Georgia O’Keeffe Museum in Santa Fe, NM, put it, “The value proposition [of these cloud-based apps] is in the collective use.”

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<sup>12</sup><https://knightfoundation.org/reports/digital-transformation-an-assessment-of-grants-supporting-digital-staff-in-museums/>

<sup>13</sup> Weisberg, Robert J. “‘The Program Follows The Culture’: How Museums Used Workplace Tech Over Lockdowns |.” *Jing Culture and Commerce*, 2022.

*“We need to figure out what our digital capacity is. How much time is wasted if your organization doesn't have digital continuity.”*

–FAF2 participant

While these free or low-cost platforms provided a short-term lifeline to many organizations, the structural issues persist. A survey of U.S. And U.K. museums' data practices revealed the significant cost of this underinvestment and technical debt to museums which hadn't previously invested in infrastructure. Even within the cohort of museums which had digitized collections and assets to work with, many struggled to maintain operations because they had systems not designed to be remotely accessed by staff forced to work from home. As the report's authors noted, “those that don't have that facility are stuck and I think it's really expensive.”<sup>14</sup> This realization has been a common one for the participants in FAF2.

*“FAF2 has shown me that I have a lot of work to do in terms of setting our organization up for the future to ensure seamless transition. It has made me more thoughtful in recording work completed to be referenced at a later date.”*

–FAF2 participant

## **No going back: Adapting to the new hybrid “normal”**

Successive waves of closings and reopenings of facilities, coupled with continually shifting government guidance on public health protocols, have badly disrupted physical museum operations. Probably the most impactful change this has produced has been the rise of remote work, or “working from home” that many museums fell back on by necessity. Once the prerequisite of a privileged few, remote working or WFH has suddenly become the norm for a significant percentage of museum workers. And by and

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<sup>14</sup> Noehrer, Lukas, et al. “The Impact of COVID-19 on Digital Data Practices in Museums and Art Galleries in the UK and the US.” *Humanities and Social Sciences Communications*, vol. 8, no. 1, Springer US, 2021.

large, the museum workforce has welcomed the change. A 2022 survey by the UK-based consultancy Culture24, the latest addition to their ongoing “Let’s Get Real” research project, surveyed museum workers about their attitudes toward the hybrid workplace. Overall the survey showed that 73% of people felt that changes to the way they do their job as a result of hybrid working have been positive, 10% feeling neutral, and only 17% feeling negative. The survey found that museum staff felt that hybrid working allowed them to:

- work with people from further afield – regionally and internationally
- increase digital skills, literacies and confidence within the organization
- improve communication between team members to improve the diversification of audiences online<sup>15</sup>.

*“[C]onsistent reporting from all staff and/or all areas is important to maintain continuity of an organization, not just with what's happening presently, but also as a way to look back and see what has happened within an organization in the past.”*

–FAF2 participant

These findings map neatly onto the operational capacity and continuity core competencies established for FAF2: assembling cross-functional teams, establishing sustainable support for digital operations, and building operational continuity through internal communication and knowledge management systems. As the timeline for when society reaches whatever its new equilibrium point continues to shift, the importance of these capabilities remains critical. And even once a new “normal” is reached, there is strong evidence to believe that it will still be a hybrid one. The online audience for cultural offerings seems likely to shrink, but not to disappear. The findings of the 2<sup>nd</sup> Wave of CultureTrack’s survey found that over 1/3rd of the U.S. audience is interested

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<sup>15</sup> Finnis, Jane. Navigate the Challenges of Hybrid Working with Let’s Get Real. no. March, 2022.

in online experiences (9% prefer them, and 26% are agnostic)<sup>16</sup>. In addition to this, the flexibility offered by hybrid work has made it both attractive and necessary to workers. While some executive leaders may advocate for a return to the 20<sup>th</sup> century model of full-time onsite, it seems likely that the percentage of the workforce that works exclusively on-site will not return to pre-pandemic levels. As one of the respondents said, *“My sense from conversations is that people are worried about people wanting to fall back to the old normal, not realizing that the only path forward—that is safe and sustainable—is going to be a new normal.”*<sup>17</sup> The new normal is likely to be hybrid, and many museum staff—like the American workforce in general—will want to continue.

## The importance of Technology Audits

As part of their work on FAF2, participants learned about the need to understand operational capacity as a way to build business continuity and resilience to this current crisis, and those yet to come. Without a comprehensive accounting of all the functional areas of an organization, it is impossible to adequately gauge its capacity. Therefore, tremendous emphasis was placed on constructing and conducting technology audits. A thorough audit by a dedicated team with a mandate from executive leadership will be able to collect and demonstrate what technologies a museum uses, how it uses them, how much it spends, and whether there are any hazards already identified by the staff most closely associated with those technologies.

The result of this audit should be a report that summarizes all functional areas, analyzes those summaries and identifies trends or patterns, and makes recommendations for how to increase capacity through projects, training, and budget allocations. Lindsey

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<sup>16</sup> LaPlaca Cohen, and Slover Linett. CULTURE + COMMUNITY IN A TIME OF CRISIS: Key Findings from Wave 2. 2021. pg 15

<sup>17</sup> Noehrer, Lukas, et al. “The Impact of COVID-19 on Digital Data Practices in Museums and Art Galleries in the UK and the US.” Humanities and Social Sciences Communications, vol. 8, no. 1, Springer US, 2021.

Richardson, the instructor for this module, stressed the importance of acting on the findings of an audit. Otherwise, a report is just a document. In keeping with modern knowledge management practices, documents like audits should be widely available records of what has been learned, and foundational documents for the work that will build on the findings of that audit.

*“We need to figure out what our digital capacity is. How much time is wasted if your organization doesn't have digital continuity.”*

–FAF2 participant

The business imperative behind understanding operational capacity is *business continuity*; the ability to operate under difficult situations and continue to function with as little disruption as possible. While continuity may seem like technological issues, the key to being successful is in changing human behavior. As Noether et al found in their study on museum data practices, *“Our analysis found that whilst financial investment in skills and capacity is important, organizational culture can be a greater barrier to digital development, with success dependent on leadership teams adopting future-facing strategies and encouraging more embedded digital cultures within their institutions<sup>18</sup>.”* Changing well-established organizational cultures requires tremendous amounts of communication and sharing of data. In *“Seven Things Data-Informed Organizations Do Differently”*, researchers Colleen Dilenschneider and Jim Hekkers list the attributes of “data-informed” institutions.

- Are transparent and bring everyone to the same level of understanding;
- Incorporate data into all planning processes (not just marketing);
- Develop measurable objectives and metrics for success;
- Continuously gather market data and update plans accordingly;
- Take advantage of the predictive power of data;

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<sup>18</sup> Noehrer, Lukas, et al. “The Impact of COVID-19 on Digital Data Practices in Museums and Art Galleries in the UK and the US.” *Humanities and Social Sciences Communications*, vol. 8, no. 1, Springer US, 2021.

- Look at market research as an investment rather than a cost; and
- Are actively shifting the organization’s culture<sup>19</sup>.

It is no accident that six of the seven attributes require open and fluid communication.

## More ingredients to future-proof your museum

### Digital Mastery

In 2021, Didier Bonnet and George Westerman revisited their foundational 2014 article “The Nine Elements of Digital Transformation” to see what had changed in the intervening years. In “The New Elements of Digital Transformation” they set out the results of their extensive surveying of U.S. Business leaders and found that the two core capabilities they had identified in 2014—leadership capability and digital capability—were still the distinguishing variables that separated successful institutions from the rest. This ability to simultaneously exercise both capabilities they call “digital mastery.” Further they found, perhaps unsurprisingly, that the core elements of leadership capability, like vision and governance, were not fundamentally changed, though they are now much more influenced and driven by digital data. However the digital capability, which they define as the ability “to use innovative technologies to improve elements of the business.”<sup>20</sup> had undergone tremendous evolution, and expanded to encompass customer experience, employee experience, operations, business model, and digital platform. The digital masters, as they call the organizations that possess both capabilities, are able to transform digital technologies into business advantage. The implication for museum leaders, currently focused on surviving the pandemic, is clear, *“But even as companies have had to move quickly to adjust to the realities of a global pandemic, their leaders also need to take a longer view. They need to consider how digital technologies can be used not only to enhance their products and processes but*

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<sup>19</sup> Dilenschneider, Colleen. “Seven Things Data-Informed Organizations Do Differently.” Know Your Own Bone, 2019, <https://www.colleendilen.com/2019/10/08/seven-things-data-informed-organizations-do-differently/>.

<sup>20</sup> Bonnet, Didier, and George Westerman. “The New Elements of Digital Transformation.” MIT Sloan Management Review, vol. 62, no. 2, 2021.

*also to reinvent their businesses.”*

## Dynamic capability

David Teece proposed defining dynamic capability as an organization’s “ability to integrate, build, and reconfigure internal and external competencies to address rapidly changing environments”. Business continuity can be thought of as the result of sufficient dynamic capability. Three main mechanisms enable businesses to innovate and adapt to changes in their environment:

- Sensing: actively scanning the landscape for opportunities and technologies that can provide advantage.
- Seizing: mobilizing resources to improve response to needs and opportunities and gain value from them.
- Transforming: the ability to continuously update and configure resources so that organizations are able to both seize opportunities strategically and respond to threats.

Dynamic capability theory has become a prominent research perspective because it explains how companies (or museums) respond to rapid changes in technology and markets. For us, understanding and leveraging dynamic capability in a field that is creatively dynamic, but organizationally lethargic, is no small challenge. But despite the challenge, the potential upside of building dynamic capability is that it can improve the organization’s ambidextrous innovation capabilities, described below, which can improve organizational resilience overall.

## Ambidextrous innovation

“Innovation” may raise images of new technologies and doing new things, but a growing body of research indicates that innovation can be viewed in two very different ways.

*Exploitative innovation* involves improving performance by refining and extending an enterprise’s existing capabilities, processes, and technologies. This innovation is done



in the service of a predictable outcome, like increasing the ability to understand customer demographics. *Exploratory innovation* involves the development of new knowledge, products, and services. This innovation is done in the service of an unpredictable outcome, like standing up new kinds of programming to reach new audiences.<sup>21</sup> Many institutions are good at one kind of innovation or the other. But to be truly successful, organizations need to practice what researchers call *ambidextrous innovation*. Ambidextrous institutions can on the one hand, deploy technologies to improve and expand existing capabilities, while on the other hand using them to explore completely new avenues.

All these capabilities and competencies echo the findings of the Knight Foundation report on Digital Transformation, which made two recommendations that are especially important to museums that are laser-focused on audiences in 2022. The first is the recognition that important work doesn't always result in visitor-facing results. A new POS system that improves your museum's ability to manage accounting processes may not be noticeable to visitors, but essential to predicting cash flow. The second recommendation is to focus on capabilities, not projects. "Capacity-building", that mainstay of grant proposal applications, is nowhere near as exciting as a new project that will generate press, philanthropy, and visitor interest. But new and/or increased capacity will be a necessary ingredient for any successful organization hoping to keep up with the rate of change in the world.

## Networks and resilience

While we have thus far been focused on organizations in isolation, research indicates that the business networks that an organization engages in can have significant impact on its ability to survive and grow. A 2021 study of 400 Chinese businesses responses to the pandemic and their resilience found that:

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<sup>21</sup> Zhang, Jichang, et al. "How Does Digital Transformation Improve Organizational Resilience?— Findings from PLS-SEM and FsQCA." *Sustainability* (Switzerland), vol. 13, no. 20, 2021, pp. 1–22.

- More resilient firms had deeper and broader business networks
- Ambidextrous innovation was a key mechanism in those firms, and
- A firm's ability to successfully tap networks to increase organizational resilience capacity was higher for firms with higher levels of digital technology.<sup>22</sup>

This is something the museum sector has known for some time, which is why industry groups like the Texas Association of Museums (TAM) and American Alliance of Museums (AAM) came into being. The FAF 2 program is an example of the way that networks can provide museums with more access to information, resources, and expertise.

## Conclusion

The experience of adapting to the COVID pandemic has exposed and exacerbated a number of issues in the museum sector in terms of their operational capacity and continuity plans, particularly around digital technologies and practices. Museums adapted first to online-only operation and then hybrid digital/physical operations. As 2022 progresses and Texas museums try to plan for the still volatile and uncertain future, the importance of understanding your museum's digital capacity is paramount. The FAF2 module on capacity and continuity focused on the production of an audit of the digital technology use of all functional areas of the organization in order to bring together a coherent picture of what is in use, identify issues, and plan for improvement.

To further build on the foundation that an audit provides, several other concepts can be employed to help museum professionals plan for and improve their institutions' ability to provide service to their communities in uncertain times. Digital mastery is the ability to

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<sup>22</sup> Xie, Xuemei, et al. "Business Networks and Organizational Resilience Capacity in the Digital Age during COVID-19: A Perspective Utilizing Organizational Information Processing Theory." *Technological Forecasting and Social Change*, vol. 177, no. August 2021, 2022.

cultivate two capabilities: digital capability, and leadership capability, in order to transform digital technology use into business advantage. Dynamic capability is the ability to integrate, build, and reconfigure internal and external competencies to address rapidly changing environments through three mechanisms: sensing, seizing, and transforming opportunities. Ambidextrous innovation is a particular dynamic capability that describes a firm's ability to explore and exploit simultaneously and adapt over time. These capabilities are strongly correlated with participation in networks. Programs like Finding Alternative Futures aim to provide Texas museums not only with the tools they need to survive and thrive, but also to create and strengthen the community network of museums so the resilient future-proof institutions can learn from and help one another.

## **Module 4: Community Engagement**

### **Course Content**

Popular social media sites like Facebook and Instagram, are transforming how people connect and grow their sense of community. How can museums increase their impact using these and other digital platforms? Analyzing current models of online community collaborations will inspire new solutions for growing public influence and/or achieving DEAI goals.

### **Skills and Competencies:**

- Fostering new relationships through deep listening
- Aligning and communicating institutional values
- Creating sustainable value propositions for partnerships
- Employing the Mass Action Toolkit effectively

### **Larger Context**

The pandemic spawned a huge number of online programs and events as museums scrambled to translate their in-person operations into the digital realm. From this

collective innovation, there have been successes and failures, and many surprises for museums discovering online audiences they didn't know they could interest. Deciding whether or not to maintain digital programs and if so, which ones, once in-person visitation resumed has been a concern shared throughout the field as workers shifted to online programming have had to return to their pre-pandemic duties.

The pandemic also made clear the extent to which museums were perceived as vital to their communities...or not. In a recent CultureTrack report, when asked to vote on their agreement with the statement " I hope arts and cultural organizations will become more relevant to people like me."<sup>23</sup>, the results were startling. Over half the respondents neither agreed or disagreed with the statement. Given how uniformly the museum field and the cultural sector at large has fretted over their ability to sustain operations in an age of slowly declining attendance and support, the idea that most Americans don't have any desire to see cultural organizations become more relevant is a clear indicator that they already don't see them as particularly relevant in their lives. Solving the engagement equation will require museums to think differently about how they view their audiences and what work they undertake.

## The State of Cultural Audiences in 2022

It should come as no surprise to anyone that the CultureTrack Wave 2 report found that Americans feel more disconnected, more sad or depressed, angrier, more worried or afraid, and more bored than they did before the pandemic. The disruption has been almost incalculable and touched every aspect of our lives. As a result, audiences report that they are looking for fun, calm, adventure, connection with others and humor. In a word, they're looking for respite.<sup>24</sup> Their Rethinking Relevance report found that most

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<sup>23</sup> Culture+ Community in a Time of TRANSFORMATION: Key Findings From Wave 2

<sup>24</sup> Culture+ Community in a Time of TRANSFORMATION: Key Findings From Wave 2

Americans believe cultural organizations should play a role in helping their communities, but haven't seen many examples of it yet. They identified three things audiences are looking for from their arts and cultural organizations. They should:

- serve as an emotional outlet (83%),
- provide connection and learning (77%), and
- give practical help (54%).<sup>25</sup>

Let's look at what the research says about how museums doing in meeting these needs.

Looking for opportunities for emotional outlet is connected to the increased levels of depressions and isolation Americans reported and it is telling that audience are seeking it wherever they can find, even outside of traditional arts and cultural organizations. An example of this can be seen in sudden popularity of "Immersive Van Gogh" type, projection-based experiences, that sprouted like mushrooms all over the country during the pandemic. What is driving this popularity? One possible answer lies in a 2021 study of art museum visitors. The authors found that visiting art museums stimulates positive emotions, promotes feelings of engagement resulting in an improved quality of life, and reduces the production of cortisol (a hormone related to stress) in our body.

Interestingly, both the artworks and the presence of other visitors at the museum make us feel connected and less isolated. The authors claim this can even encourage the building of like-minded communities among museum-goers.<sup>26</sup> The large-scale immersive productions likely produce the same positive emotions and cortisol reduction effects.

As the pandemic has stretched on, American audiences have also connected more and

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<sup>25</sup> Rethinking Relevance, Rebuilding Engagement: Findings from the second wave of a national survey about culture, creativity, community and the arts. pg 5

<sup>26</sup> Katherine N. Cotter & James O. Pawelski (2021): Art museums as institutions for human flourishing, The Journal of Positive Psychology

more with cultural producers for their online learning, rather than interlocutors like museums. CultureTrack found that the percentage of people consuming online content provided by individual artists or performers, performing art centers, and libraries all went up, while the percentage viewing content from museums went down.<sup>27</sup> This would seem to indicate a desire to have direct connection with artists and makers and less interest in having curators or experts mediating that connection. A small example of this phenomenon is the sudden rise in popularity of history organizations finding success on TikTok demonstrating historical methods of cooking, crafting, and clothing. Whether these kinds of programs replace standbys like virtual tours of exhibitions and curator talks is unclear, but it does seem to indicate a desire to see work being done and not learning about it afterwards.

Even more worrying than this increased competition is the perception among Americans that museums and cultural organizations aren't being helpful. Only 27% of respondents knew of examples of cultural organizations helping to their communities, and this number had fallen since the beginning of the pandemic<sup>28</sup>. Interestingly, a majority of respondents felt that cultural organizations, regardless of their stated missions, should be tackling the social issues of the day, starting with systemic racism. Looking at the four main findings of the report, the enormity of the work ahead for cultural organizations becomes clear. Americans want their cultural organizations to:

- Promote community well-being.
- Embrace the possibilities of hybrid experiences.
- Identify what matters most to their community to co-create new possibilities.
- Take a holistic approach to diversity, equity, and inclusion.<sup>29</sup>

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<sup>27</sup> Culture+ Community in a Time of TRANSFORMATION: Key Findings From Wave 2

<sup>28</sup> Rethinking Relevance, Rebuilding Engagement: Findings from the second wave of a national survey about culture, creativity, community and the arts pg 5

<sup>29</sup> Culture+ Community in a Time of TRANSFORMATION: Key Findings From Wave 2

Whether you're working at an historic house or arts center, or a museum small or large, these audience expectations show no sign of going away. In the latest CultureTrack report, only 8% of Americans disagreed with the statement that arts and culture organizations need to change. Millennial and younger Americans, the rising generations of museum supporters and donors (or not!), feel that we should be addressing these issues simultaneously. How your organization adapts will require a thorough rethinking of the audience relationship.

## Equity, Engagement, and Museums

The cultural sector isn't immune to the larger issues and conflicts gripping American society. This is evident in the differences in attitude towards cultural organizations found in the various CultureTrack reports. Perceptions of systemic racism in cultural organizations were significantly higher among Black and African Americans (77%) in comparison to White Americans(35%).<sup>30</sup> History museums and attractions were at the top of the list with more than half of Black and African Americans (54%)<sup>31</sup> saying that, based on their experience, they'd encountered system racism at these places. Shifting that perception is going to require substantial effort, but Americans also seem more hopeful (53%) than they were at the start of the pandemic that change can happen (30%)<sup>32</sup>. What those hopes look like can be seen in this graphic.

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<sup>30</sup> Rethinking Relevance, Rebuilding Engagement: Findings from the second wave of a national survey about culture, creativity, community and the arts pg 6

<sup>31</sup> ibid pg 33

<sup>32</sup> ibid pg 33



So, if you've been reading this report and wondering what "change" might look like, here are some very concrete suggestions offered up by audiences. As you're looking at your strategic plans and next year's programs, this could be useful yardstick to measure them against. Are your current and planned offering addressing these concerns? If so, how can you make that apparent to your community. If not, how might you incorporate them? The report authors ask five more questions as being the most important for cultural organizations to consider as they rethink how they engage with their audiences.

- What would it look like for your organization (or art-form or cultural practice-area)

<sup>33</sup> ibid pg 34



to become more welcoming, not just to current participants but also to other people in your community who may not feel that the experience is intended for them?

- What connections do (or could) exist between your artform or cultural category and the kinds of social issues that matter to your community?
- How do (or would) efforts to dismantle systemic racism align with your organization’s mission, values, and role in the local ecosystem or national field? Who are the stakeholders, internal and external, who would need to be (or already are) involved in this work?
- Do you honor equity in your collaborations through shared decision-making, respect, and reflection of ground-level community priorities?
- Have you charged users/audiences for online content? Why or why not? Do you believe it can become a revenue stream?<sup>34</sup>

## How Digital Offerings Can Help

Another reason for considering “more digital offerings” is the extent to which BIPOC audiences were more likely to be “digital only” consumers of cultural content during the pandemics. For botanical gardens, natural history museums, and art museums), the “digital only” subset is significantly more likely to be Black/African American. In science or technology museums and libraries, the “digital only” subset is significantly more likely to be Hispanic/Latinx.<sup>35</sup>The report authors postulate that digital offerings lack some of the social or cultural doubts and discomforts associated with in-person attendance for BIPOC Americans. They also ask the question of what might we learn from these online experiences to make in-person experiences more accessible for BIPOC Americans?

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<sup>34</sup> Rethinking Relevance, Rebuilding Engagement: Findings from the second wave of a national survey about culture, creativity, community and the arts pp 8-9

<sup>35</sup> Centering the Picture: The role of race & ethnicity in cultural engagement in the U.S: An analysis of national survey data from the first wave of Culture+Community in a Time of Crisis.

An example worth considering is a project done by the Barnes Foundation in Philadelphia. In 2018 they brought VR headsets loaded with 360 video tours of the museum and a customized teaching program to public libraries in predominantly African American neighborhoods of Philadelphia where visitation to the museum was low. Visitors were asked if they wanted to try a VR headset and explore the Barnes. As they explored the tour, staff asked them what appealed to them and made notes that were used to build a customized tour of the physical space. When they were done with the tour, they were offered the opportunity to take a guided tour of the Barnes later, an offer that was accepted by 31%<sup>36</sup> of the people who tried the VR experience. 80% of those people were first-time visitors and 14% had not been to the Barnes in more than two years.<sup>37</sup>

## Online Programming

The tremendous leaps made in online programming during the pandemic need no further explanation. Faced with shutdowns and cessation of in-person events, most museums turned to online formats to continue their missions. Everybody learned how to use Zoom, and quickly. So after eighteen months of saying, “You’re on mute!” what have we learned about online programming? Plenty, it turns out. The FAF2 program looked in depth at creating engaging online programming and how museums’ digital programming over the course of the pandemic evolved from digitally replicating existing in-person programs to experimenting broadly with new kinds of programs. With this experience also came the realization that the concept of “visitor” now includes people who may never come to our sites and buildings.

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<sup>36</sup> Mid-Atlantic Regional Center for the Humanities, Barnes Foundation Uses VR to Engage New Audiences. <https://march.rutgers.edu/barnes-foundation-uses-vr-to-engage-new-audiences/>

<sup>37</sup> Barnes Foundation, The Barnes Foundation Expands Virtual Reality Program. <https://www.barnesfoundation.org/press/press-releases/virtual-reality>

## Platform Expansion is Here to Stay

Despite the growing percentage of visitors hitting museum websites<sup>38</sup>, one of the biggest changes has been the acceptance that the days of the museum website being the *sole* vehicle for online engagement are gone for good. We know visitors are much more likely to type a few words into a search engine and begin exploring from there, rather than learning and using our specialist vocabularies to query collections databases. They hear about online programs via social media platforms (more on those later) and access programming directly from them. They communicate directly with your staff through these platforms as well, and are displeased when they don't get an answer. As Colleen Dilenschneider revealed in an article on barriers to visitation, *“Cultural organizations do not get “bonus points” for being active and responsive online anymore. It’s an expectation that has only grown stronger during the pandemic.”* If that expectation is met, visitors can have a complete and (hopefully) satisfying transaction without ever visiting the website. Nowadays, even basic logistical information like contact info and opening hours are scraped from your website by programs and displayed to potential visitors before they even get to your website.

## Web 2.0's “Walled Gardens” Present Persistent Challenges

Eli Pariser wrote in Wired that our society faces a huge challenge in the digital realm. *“Much of our communal life now unfolds in digital spaces that feel public but are not.”* Despite the democratic origins of the web and its promise of universal access to information, he compellingly argues that Web 2.0's greatest success has come from creating an ever-decreasing number of “walled gardens” that exist to monetize your attention for the owners.<sup>39</sup> The idea of a walled garden in the digital realm is simple. It means that the platform or technology is built in such a way that the owner of the garden has complete control over access, and someone in the garden is unable to

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<sup>38</sup> Colleen Dilenschneider, Increased Digital Engagement is the New Normal. <https://www.colleendilen.com/2021/09/29/increased-digital-engagement-is-the-new-normal-for-cultural-entities-data/>

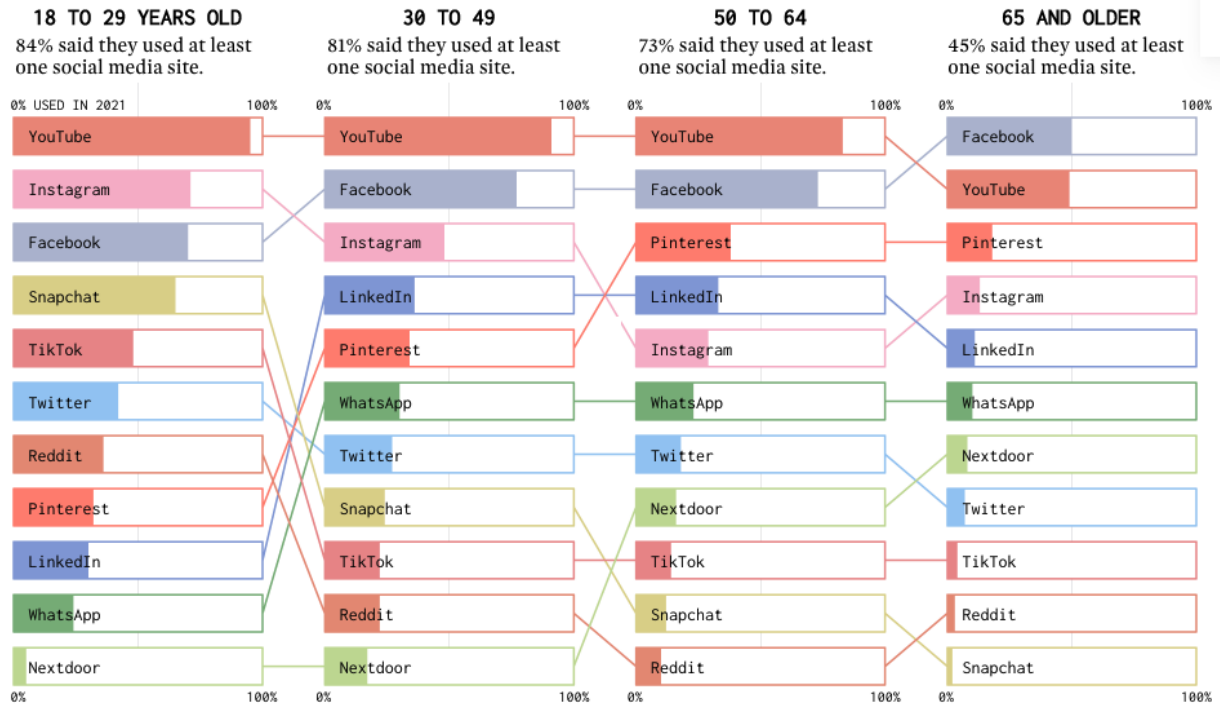
<sup>39</sup> Eli Pariser, “To Mend a Broken Internet, Create Online Parks” Wired 10/13/2020

escape except through the designated entry/exit points. As an example, if you place a hyperlink in a tweet on Twitter, it will be replaced with a shortened link generated by Twitter so they can track who clicks on what. Amazon will manipulate search results to favor sellers who pay Amazon for that privilege. So while they may feel like the digital equivalent of public spaces, they are most assuredly not. This is the reality museums face in the digital realm. If you've ever tried to get your museum's message out to its Facebooks subscribers, you've come face to face with the "pay us more money and we'll show your content to more of the people who have already asked to see your content." conundrum. Do you pay to play? How much do you pay? How do know your payment is resulting in the right people seeing your content? Where do you devote your finite resources to reach the audiences you seek?

One truism of good outreach efforts is that you have to meet people where they are; intellectually, emotionally, and physically. In the digital realm, that means using the online spaces your audience is already using rather than expecting them to come to you. This might seem like a hurdle, but there are resources available to you to help understand how Americans are using online resources. This post from FlowingData<sup>40</sup> about social media use by Americans in 2021 is a great example of the kind of analysis that can help you strategically deploy your resources.

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<sup>40</sup> <https://flowingdata.com/2022/04/13/social-media-usage-by-age/>



Source: Pew Research Center / By: FlowingData

## Talking to Audiences is Vital

But even more importantly than knowing where audiences are, museums need to talk with those audiences. All of the questions raised in this section can be studied by engaging with the public and asking them about their hopes and needs. Continuing to build more content into architectures that are already not being used by visitors is not a recipe for success. And when those audiences may be as-yet-unfamiliar to you, reaching out to them before you expend time and money on building content for them is essential. At almost every step of the online program development model shared with the FAF2 cohort, outlined below, communicating with audiences is an integral step.

1. Articulate your Value Proposition (requires audience input)
  - Analyze the Potential Benefit (requires audience input)
  - Determine the Impact (requires audience input)
2. Assess the Resources Needed to Succeed (benefits from audience input)
3. Assess the Risks (requires audience input)

#### 4. Share the Value Proposition (benefits from audience input)

This lack of familiarity with online audiences is as important to overcome as technological fluency, and museums have the benefit of already understanding how to engage visitors in the physical realm. As Deb Howes reminded the FAF 2 cohort, *“You already know how to make meaningful, transformational and humanizing experiences. Think carefully about the visitors you want to engage and how your collections and exhibitions might bring inspiration and value to them in an online context. Don’t allow your lack of familiarity with digital platforms and tools prevent you from achieving these goals.”*

As if this weren’t enough reason to tackle online programming, a recent study on community well-being found that online programs aimed at promoting social cohesion using art experience not only benefitted communities, but especially benefitted marginalized ones. The authors report this kind of engagement “may be particularly useful in promoting positive outcomes in communities that experience racism, oppression, or structural disinvestment if additional effort is made to reduce structural barriers.<sup>41</sup>”

## Community Engagement

While successful online programming is an important tactical tool for Texas museums, the larger strategic imperative that underlies this is that of community engagement. All the concerns raised in the first section of this report point to a growing disconnect between museums and the people they serve, and raise possible avenues for closing that gap. Throughout the course of the Finding Alternative Futures program, teaching skills and providing tools to better engage with audiences has been a core goal. But what do we mean by community engagement. Candace Matelic, who led the module on

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<sup>41</sup> Engh, R., Martin, B., Kidd, S. L., & Nicodermus, A. G. (2021). WE- making: How arts & culture unite people to work toward community well-being. Metris Arts Consulting. pp 48-49

this topic, describes it thus:

*“Recall my definition of community engagement is that the community has ongoing involvement in museum planning, governance, decision making, resource acquisition and allocation, and program delivery. It is more than consultation, more than outreach, more than DEI.”*

Note this is much larger than “delivering programs for a particular audience” and proposes a totally new way of operating that centers the audience in a way that may seem alien to museum professionals who have learned to privilege expertise in subject matters over all else. But the expectations of the audience and the larger trends in society all point toward this rethinking of the audience relationship being critical going forward.

## Audience Development vs Community Engagement

A common error that museums make is that of confusing audience development (getting more people in) for community engagement (getting more people to care enough to engage). One is transactional, and the other relationship-based. Audience Development is a short term marketing strategy to increase the number of people who visit your organization. Good audience development builds and broadens your audience, which can turn into support for your organization. In short, it's a vital tool. Community Engagement is a long term strategy organizational development to build community ownership, participation, relationships, and support for your organization. It builds a better community, which in turn, builds your audience and position of importance in the community.

## Community Engagement Helps Foster Stronger Communities

One of the primary impacts of successful community engagement is stronger, more cohesive communities. If programs are the tools we use to reach visitors, community engagement is how we co-create the kinds of communities we want to live in. The tools are what we use to achieve that. Kelly Cannon recently hosted a conversation on the

Museums As Progress (MAP) site<sup>42</sup> that brought together four different museum professionals to talk about how their online programming has fed into their larger engagement strategies. MAP is an initiative by SuperHelpful, an audience research and development firm based in New York, that seeks to help cultural professionals create more innovative organizations — primarily through audience research. The four key takeaways from that conversations were that the primary benefits included license to experiment with formats and topics, the ability to creatively expand beyond the constraints of in-gallery formats, an easy way to connect programming to participants' lives and surroundings, and a way to develop truly participant-centered programming.<sup>43</sup> All four of the conversations are worth watching. A quote that stood out for me was from Rebecca Harmsen from the Museum of Flight, who said:

*“take the extra step of getting to know your audience in any small way, especially in the virtual realm when you can’t see them. Try to build an experience around them. ‘If you want it to focus on this, yes, we can do that.’”*

As the field continues to grapple with the continued disruption of the pandemic in 2022 and for the foreseeable future, the need to engage constructively with audiences online has become an existential necessity for Texas museums. It’s our hope that this research will provide the Texas museum community with both food for thought, and actionable information they can incorporate into their planning.

Substantial research from the field and beyond indicates that cultural audiences are expecting all the institutions they support to become more engaged in the larger social issues facing their communities and will likely cease to support institutions that fail to adapt to the times. How best to reach those audiences and establish lasting

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<sup>42</sup> <https://museumprogress.com/>

<sup>43</sup> Kelly Cannon, Museums As Progress. Here to Stay: How Virtual Programming Has Helped Museums Expand Community Engagement. <https://museumprogress.com/letters/why-virtual-programming-is-here-to-stay>



relationships with them will be determined by the quality of online programming that those museums can generate and the larger engagement strategy that they serve. Acknowledging their importance, FAF2 included two distinct modules addressing the ins and outs of successful online program development and community engagement.

## **Module 5: Digitally Savvy Leadership**

### **Course Content**

Cultivating and building teams from a wide range of professionals, including board members and vendors, is a critical skill. Understanding how and what to communicate, as well as which platforms might support these collaborations, is key to agile and productive project management. Good digital content strategies enable staff to adapt DEAI policies in productive and accessible ways.

#### **Skills and Competencies:**

- Cultivating cross-functional teams for long-term leadership
- Understanding the potential for digital platforms to improve (as well as challenge) advancement in Diversity, Equity, Access, and Inclusion (DEAI).
- Supporting content development & management strategies
- Improving digital fluency and vocabularies

### **Larger Context**

Given the strategic imperatives to evolve museum practice in these volatile times, promoting leadership that “gets it” is an essential for any institution. The kinds of models and organizational structures that will be needed to thrive in the future will require executive leadership and support. For FAF Phase 2, the final module exclusively focused on understanding the need for digitally savvy leadership and exercises to develop it amongst the members of the FAF2 cohort.

What does it mean to be digitally savvy? First off, we should clarify what we mean by “savvy”. According to the Oxford dictionary, “savvy” as a noun means “shrewdness and practical knowledge; the ability to make good judgments.” It’s not another kind of domain knowledge, like understanding programming or computer science. It’s knowledge learned through practice about making judgements. In other words, savvy is a core leadership trait. Executives must make judgement calls all the time, often outside of their particular expertise (think pandemic responses) and learning how to make good ones is the key to success. In the digital realm, the same rule applies.

## Digitally Savvy leadership: A Working Definition

Facilitator Eric Ames began the module by proposing a definition of digitally savvy leadership as “An approach to leadership that incorporates innovation, technology, and strategic planning into plans for the institution's future.” For museums and cultural organizations that are focused on preservation and conservation, this can seem like a significant change to business as usual. But it is important to note that this approach doesn’t replace the traditional skills and responsibilities of museum leaders. It incorporates 21<sup>st</sup> century necessities into leaders’ thinking and planning.

The need for digitally savvy leadership is great. Two recent MIT reports sought to quantify the scale of the issue and identify behaviors that help or hinder leaders. In 2021, Peter Weill, Stephanie L. Woerner, and Aman M. Shah published an article called “Does Your C-Suite Have Enough Digital Smarts?”<sup>44</sup> which surveyed over 3,000 U.S. companies. Organizations with digitally savvy leadership outperformed their peers by 48%. Only 23% of CEOs considered themselves digitally savvy, and only 7% of large

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<sup>44</sup> MIT Sloan Management Review; Cambridge Vol. 62, Iss. 3, (Spring 2021): 63-67.

companies had digitally savvy executive teams. An even larger, global survey of over 4,000 business executives revealed a similar disconnect and sought to tease out some of the ways that effective leaders have been managing to move their organizations down the road of digital maturity. In “Leadership Playbook for the Digital Age: Reimagining What It Takes to Lead,”<sup>45</sup> the authors identified three categories of existing leadership behaviors that influence digital maturity:

- **Eroding behaviors**, or antiquated leadership patterns such as relying upon hierarchy for influence, command-and-control decision-making, and rigid strategic planning.
- **Enduring behaviors**, evergreen and time-tested leadership attributes and behaviors including ethics, trust, and integrity.
- **Emerging behaviors**, including digital savviness and collaboration skills.

Digitally savvy leadership requires executives to identify and differentiate their behaviors, putting down eroding ones while maintaining enduring ones and encouraging and practicing emerging ones. The authors reported,

*"A key to success is artfully introducing new leadership approaches that particularly appeal to a new generation of employees while at the same time honoring the time-tested behaviors and attributes that inspire trust, build a sense of community, and motivate employees to improve performance."*

A delicate balancing act, to be sure, but a necessary one. The authors caution that the primary leadership challenges in the digital economy require developing new mindsets that anchor, inform, and advance these behaviors. As has been reiterated throughout the FAF2 program, success involves learning new mindsets and ways of working more

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<sup>45</sup> <https://sloanreview.mit.edu/projects/the-new-leadership-playbook-for-the-digital-age/>

than it does specific digital skills.

As one FAF2 cohort member put it, “COVID created uncertainty. We had to sink or swim. Those who thrived embraced digitally savvy leadership” And that leadership extends to the board level. The global consulting firm Protiviti looked at companies’ performance and found that having just three digitally savvy board members can make a statistical difference in profitability. They further found that more successful boards think of digital technologies as a driver of strategies, and not just another tool to enable strategies. Key to that was developing the ability to merge traditional institutional knowledge with digital perspectives gained from outside experts or through a course of self-directed study like FAF2.

## Training Digitally Savvy Leaders

Texas museums, like the rest of the field, are caught in a fast-moving paradigm change where established leaders by and large lack training in digital skills, and the rising generation of digitally savvy professionals lack leadership training.

*Digitally savvy candidates "often lack the needed level of organizational leadership. I hear this in comments such as 'We need someone who is confident in front of the CEO'"*

- Bob Gilbreath, 2011

Given the mismatch, the options facing most institutions are either wait and hope to find leadership that “gets it” or develop them from within. This is a break from the past, when museums could expect formal higher education to provide fresh crops of new professionals with all the skills needed to start in the workplace. While that may again become true, for the foreseeable present, it’s not. Once you understand that digitally savvy leadership is important, then seeking out resources to create digitally savvy

leaders becomes a vital tool for institutional survival. Part of that involves hiring. Leaders need to be looking for candidates who demonstrate comfort with technology, possess a mix of specific and general skills and experience, and are the kind of people who embrace mission and who will embrace digital techniques.

## Digital Skills Alone Aren't Enough

The other part of the personnel equation involves rethinking professional development. As researcher Charlene Li noted, “In today's environment, the people who make decisions exist on the edges and at the bottom of our org charts.” Potential leaders exist everywhere and finding ways to grow and diversify the talents of existing staff has great potential to provide a pipeline of future digitally savvy leaders. Institutions that are doing well in this tend to have created a workplace culture of sharing, who practice *followership*-the process of being able to take direction, be a team player, and be able to execute-as well as leadership, and focus on making meaningful decisions.

## Starting Down the Path to Digitally Savvy Leadership

If this sounds like a heavy lift, the work of years, it is. That doesn't mean that an entire program needs to be scoped and built in order to advance further down the road building confidence around digital savvy. As Eric Ames pointed out, there is a lot that can be done internally, by identifying what he calls “Digital Practice Advocates” (DPAs), who can help the organization embrace digital practices, and merge the best of two worlds. They likely already exist within your current board, leadership, and staff. These DPAs display a number of key traits.

- They possess a spirit of exploration and adventure
- They are eager to learn
- They possess some past mastery in their domain

- They spend time with staff under age 25
- They seek out critics and cynics to test their ideas.

### A Note on “Digital Natives”

Interacting with younger colleagues who have life experiences that exist entirely within the digital era is important for leaders. This is not to be confused with the widespread idea that “digital natives” are somehow more digitally savvy than older generations. Sociologist Eszter Hargittai’s research, among others, “do not support the premise that young adults are universally knowledgeable about the Web. Rather, we observe systematic variation in online know-how even among a highly wired group of young adults based on user background.”<sup>46</sup>

Another factor aiding internal efforts to build digital skills is that professionals tend to underrate their own level of digital knowledge, or in plainer terms, you’re already more digitally savvy than you think. Overcoming resistance to gaining more tech savvy is made easier by recognizing the skills and behaviors you already possess.

The five tools for overcoming resistance that were proposed at the leadership module are within reach of even the most resource-constrained leader.

- Start reading
- Open YouTube and feed your curiosity
- Cultivate a volunteer mindset
- Get active on social media
- Practice, practice, practice.

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<sup>46</sup> Digital Na(t)ives? Variation in Internet Skills and Uses among Members of the “Net Generation”  
Sociological Inquiry, Vol. 80, No. 1, February 2010, pg 109

## Learnings from FAF2: What the Cohort Told Us

Throughout FAF2, we studied what the FAF 2 cohort had to say about their progress in the program and the themes that arose for them as they worked with the instructors and mentors to chart a sustainable future for their organization. What were their big takeaways?

- Digital transformation isn't really "digital". It's about how we work together.
- It seems counterintuitive in the midst of a pandemic, but strategy and goal setting are more important than ever.
- Understanding online audiences and how they differ from onsite ones is critical.
- Though the pandemic has caused upset for the whole sector, small organizations continue to struggle the most.

Eighteen months into this unprecedented period of history, we wanted to provide the museum community with a snapshot of what we're learning from the FAF2 program and more specifically, anonymized insights from the participants in the program. The cohort has completed modules in: Online Public Programming, Operational Capacity and Continuity, and Community Engagement, and has been working with the FAF2 coaches to understand how the opportunities of the moment can be best harnessed to build resilient organizations in Texas.

*"In addition to the Annual Meeting, Professional Development, and Networking Activities, TAM is involved in Special Projects designed to strengthen Texas museums through long-term engagements such as the capacity-building project Finding Alternative Futures funded by the Houston Endowment and Summerlee Foundation and Finding Alternative Futures 2 funded by the Houston Endowment. Building on the successful first phase of the project, FAF2 includes online learning modules and resources that are intended to be repackaged to have a broader impact within the*

*museum community.”*

-Alex Freeman, Executive Director, Texas Association of Museums

## Digital transformation isn't really “digital”

The pivot to digital engagement that many museums undertook in the early days of the pandemic as an emergency measure is now over a year old. Learning how to operate in the digital realm has been an adventure, to be sure, but for many of the participants, the most important lessons thus far have had less to do with software and more to do with mindset. Most of these skills and attitudes being developed in FAF2 are not solely digital, though we're applying them to digital efforts. MIT's Sloan School and Deloitte published a report called, [“Strategy, not Technology, Drives Digital Transformation: Becoming a Digitally Mature Enterprise”](#)

MIT and Deloitte surveyed 4,800 organizations recently about their state of digital adoption and adaptation. One of their key findings was that digitally maturing organizations are,

*“more comfortable taking risks than their less digitally mature peers. To make their organizations less risk averse, business leaders have to embrace failure as a prerequisite for success. They must also address the likelihood that employees may be just as risk averse as their managers and will need support to become bolder.”*

So digital maturity and comfort in taking risks go hand in hand. Now there's nothing digital about risk taking, it's a mindset. In fact, the report's main conclusion was that digital transformation has a lot less to do with technologies than it does with strategy and mindset, *“The strength of digital technologies ... doesn't lie in the technologies individually. Instead, it stems from how companies integrate them to transform their*



*businesses and how they work.*” The pandemic has made learning to come to grips with digital technologies a necessity, or as one participant put it, *“We have really gotten a technological kick in the pants the last couple of years.”* This has resulted in many museums jumping into online engagement and demonstrating how the institutions most willing to take the risk are the ones best poised to benefit from digital technologies.

Throughout the course of FAF 2, participants have been challenged to take the lessons and reflect on how their organizations have addressed the ways they work together and how they might work differently in the future.

*“It certainly has changed my thinking. As a volunteer, not an employee and not a board member, my involvement may not be the same as some. I'm now thinking a lot about what we learned ... We also have shifted the way we work a bit...I am now far more connected and collaborative with that group of people than I ever have been, and I'm positive that has to do with FAF2.”*

-FAF2 participant

## Strategy and goal setting are more important than ever

One of the most troubling aspects of the pandemic has been how it has upset everyone’s ability to predict and plan for the future. The time-honored long-term planning that cultural organizations have engaged in has been replaced with various versions of “Will we still be open next month?” But that doesn’t mean that strategy is useless. Quite the opposite, actually, though that strategic planning will look different than it used to. In a recent report by McKinsey, “Getting ahead of the next stage of the

coronavirus crisis”<sup>47</sup> the authors suggest that organizations need to embrace new models of planning that emphasize big picture thinking, something museums are well-suited to do. *“The point isn’t to develop detailed plans but rather to figure out your broad direction of travel—the big thematic idea around which you can form a strategic response. In a world full of uncertainty, you have to stand for a goal that will matter above all else. This big idea will bring coherence and determination to your evolving tactical response.”*

Despite the pressure to do *something* in the face of buildings closing and revenues falling, FAF 2 participants found that the crisis actually reinforced the importance of good strategy. Knowing what to do (and what *not* to do) to reach your goals became critically important in 2020-21. One participant summed up the challenge thus, *“We are lucky to have just completed a strategic plan that gives us an umbrella look at where we want to go but lacks in detailing where we are. With a small staff that is already at capacity, it will be challenging to find the resources to conduct an audit.”*

*“[The FAF 2 instructors] directed us to think about issues of governance we may not have considered before, and also pushed us to think about our goals, our audience, and our purpose. I believe we need this guidance if we are going to continue to make our museum relevant and functional in the future.”*

-FAF2 participant

## Understanding online audiences is critical

In a recent article in *Museum Management and Curatorship*, “Heritage in lockdown”<sup>48</sup>

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<sup>47</sup> <https://www.mckinsey.com/business-functions/strategy-and-corporate-finance/our-insights/getting-ahead-of-the-next-stage-of-the-coronavirus-crisis>

<sup>48</sup> <https://doi.org/10.1080/09647775.2020.1810483>

researchers surveyed 83 UK and US museums' digital offering during the pandemic, looking for indicators of successful engagement. One of their primary recommendations for improvement in practice was, *“Developing collaboration strategies at a local level or beyond to enhance the resilience both of institutions and audiences.”* In a study of Korean museums and audiences *“Changes and Challenges in Museum Management after the COVID-19 Pandemic”*,<sup>49</sup> the authors found that museums that had worked most closely with their audiences had found their relationship transformed. They report that *“One of the most significant changes they introduced was considering their users as internal, rather than external, stakeholders. For promoting museum products, encouraging users to participate makes them strong supporters who are more active across online platforms and engage and motivate new users, thereby configuring the network effects.”*

Understanding audiences and the importance of actively engaging with them in new ways was a theme that many FAF 2 participants shared. Here are just a few of the comments on audiences:

*“Don’t just make stuff digital: The importance of talking to and listening to online audiences.”*

*“Don’t assume we know, or understand, who is visiting just from the analytics we get from stats, or what the online visitors do when they are on our site.”*

*“We need to talk with all of our stakeholders about our understandings (motivations, needs, wants) of our online visitors.”*

*“‘[L]istening’ and getting input from potential audiences is key.”*

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<sup>49</sup> <https://doi.org/10.3390/joitmc7020148>

*“They are not who I thought they were, we have a MUCH bigger potential audience than I first anticipated.”*

*“Reinforces my thinking that we need to get outside the building.”*

*“Realize the importance of online visitors and how different they are than our members”*

## Small organizations struggle the most

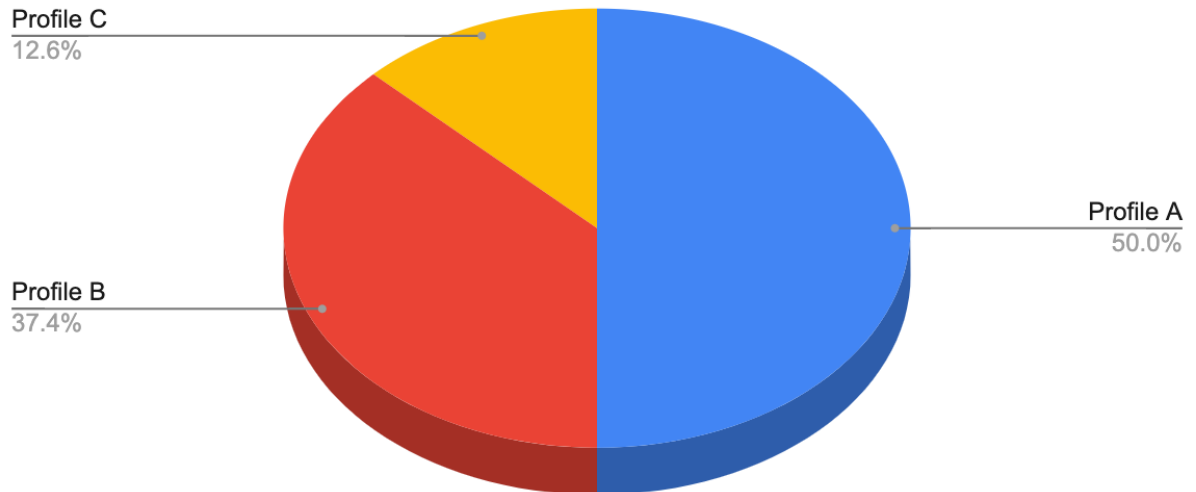
The Texas museum community is very heterogeneous. At one end are a small number of large institutions with substantial endowments and large staffs. In the middle are organizations with smaller staffs and smaller coffers, but still some resources. And at the other end, almost half of the member organizations in TAM have 0-2 full time staff members, in many cases being entirely volunteer-led.

**Profile A** - 0 to 2 Full Time Staff - 50%

**Profile B** - 3 to 20 Full Time Staff - 37.4%

**Profile C** - 21+ Full Time Staff - 12.6%

## TAM Institutional Member Profiles as of 11.1.21 - 182 Total



For these institutions in Profile A, while they appreciated and benefited from the FAF 2 experience, they voiced concerns about how applicable lessons learned were for very small organizations. *“So far it's reaffirming some lessons we've already learned. Unfortunately I've found it hard to totally relate to a very small organization.”* The resource constraints of small museums are so severe, that even in a small cohort of institutions, the situation for small museums were different enough that finding applicable lessons was a challenge.

*“As a small independent museum, some of these tasks feel very daunting and a discussion of "how to get started" and how to balance infrastructure needs with other day-to-day demands would have been helpful. I'm not sure we even have enough staff to have "cross-functional teams." We all work across functions each day! Perhaps a*

*discussion more targeted to small staffs/museums would be helpful.”*

*-FAF2 participant*

This kind of feedback is incredibly helpful to the FAF 2 team and TAM in general as they think about the ongoing needs of the Texas museum community, says Alex Freeman, TAM Executive Director,

*“In conceiving the modules for FAF2, we knew that one size does not fit all, but there were topics from our needs assessment that impacted institutions regardless of budget or staff size. The Houston museums we recruited for FAF2 represent a microcosm of the greater museum community in Texas and across the United States. By focusing on relevant topics and working with a diverse group of organization types and sizes, we are beginning to learn what we need to add to the program to provide greater support for smaller museums while thinking of how to increase relevance for larger institutions. The coaches have been instrumental in helping to translate the material while challenging others to advance their ideas and projects. The project is also providing us more direction on where to take a third phase of FAF and what types of supplemental professional development that TAM can build in-house or hire-out to address member needs ”*

## Putting yourself in the audience’s shoes (or Zoom)

A final theme emerged for us as we read the evaluations of the FAF 2 cohort; how much actually doing the coursework online mattered. Aside from the need sector-wide for professional development, there is always room for us to put ourselves in the shoes of the people we’re trying to engage, and FAF 2 has been an opportunity for the

participants to not only learn about digital engagement online, but also do so as learners rather than as instructors or designers. They get to *be* the online audience museums are trying to reach, with all the platform hassles, connectivity issues and learning curves of using new software that this entails. As one participant noted, *“It has helped to move me from a general understanding that there is a definite need to develop online capacity in tandem to in person programming, to an idea of what that looks like.”* This kind of direct personal experience will be of critical importance as museums continue to grapple with online engagement, much of which is novel for museum staff, boards, and volunteers.

## **Learnings from FAF2: What the Evaluation Told Us**

In addition to all its audience goals, FAF2 was a learning experience for TAM on what kinds of professional development member museums need and want, and what tools and techniques are the most effective for delivering high-quality professional development in a hybrid space using mainly free existing tools accessible to even the smallest member museum. In order to judge the efficacy of the program, evaluation was a key component of TAM FAF 2, beginning with the 2020 TAM Needs Assessment Survey and follow-up focus groups informing the project. ExposeYourMuseum LLC (Kate Livingston) served as the external evaluator for the project. Once the online modules were underway, four online surveys were distributed (via the online learning platform, Google Classroom) to participants—one after modules 2, 3, 4, and 5. In addition, three in-person focus groups were held in February 2022—one with the TAM FAF2 leadership (Alex Freeman and Ruth Ann Rugg), one with coaches (Nöel Harris and Brian Crockett), and one with several museum cohort participants (from six TAM FAF2 museums). Finally, a review of final project presentations (as presented at the April 2022 culminating event) were reviewed.

The evaluation is a valuable resource for any organization thinking about digital skills development in the cultural sector. In this paper, we will highlight some of the top-level findings.

## Hybrid is Hard, Even after a Couple Years

The first phase of the Finding Alternative Futures project took place just before the pandemic and therefore was mainly conducted in-person. The realities of 2021-2022 necessitated FAF Phase 2 being conducted online via Zoom, Google Classroom, and recorded video lectures. The overwhelming response from both the cohort and the coaches and TAM leadership was that the benefits of in-person meeting could not be replicated by online interactions like Zoom. The high bandwidth of in-person communication, with all its nuances and subtleties, just aren't as present in mediated environments like video chat. Figuring out opportunities to make the most of the limited options for in-person gathering will be essential to future programs since these in-person moments were widely reported as highlights of the program.

## Learners Crave Structure

The program for FAF2 was under active development until after the actual launch of the first module. While this reflected the care the FAF2 team put into getting it right, it also meant that the students and the coaches themselves were unclear on the program's boundaries and goals. The confusion that this caused the cohort and coaches was an impediment that was only overcome later in the course. For future professional development programs like FAF, having the goals and curriculum settled well before launch will be invaluable to helping the students, who are already juggling work and coursework, understand what the project aims to do, and what's expected of them.

## Coaching is Invaluable

Aside from the coursework created on the module topics discussed above, FAF2 matched the museums in the cohort with experienced coaches who worked with each



museum throughout the process to develop a project at their museum that put learnings from the program into practice. The one-on-one experience, even moderated via Zoom, was almost universally acknowledged as the highlight of the process by the people in the cohort. While this may partly be a reflection on the dire state of professional development in the museum field at large, it also reinforces an idea present in all FAF2's work that building digital confidence isn't an inherently "digital" process. A large part of confidence building boils down to having someone a little more knowledgeable support you through the process.

## Small Museums Still Struggle the Most

In a state with two time zones and 254 counties, TAM's members run the gamut from tiny organizations with exclusively volunteer staff to large well-endowed museums. A particular concern that was present from the beginning of FAF2 through its completion was the extra burden the very small museums faced that set them apart from the rest of TAM's members. In trying to design a program that could work for anyone in TAM, finding the right balance point proved elusive and reinforced the dearth of programs targeted at very small institutions. This point became abundantly clear to the coaches who were the public faces of the project and spent the most time working directly with the cohort. Much of the professional development in the field in 2022 is already geared to organizations of a certain size. Focusing exclusively on serving the smallest museums (who comprise half of TAM's membership) is an area ripe for further exploration and focus.

## Conclusion

The Finding Alternative Futures Phase 2 project, like its predecessor, was designed from the outset to be a learning process, both for the professionals who partook of its offerings, and for TAM as an experiment to further explore how associations can best aid their members in becoming more digitally confident and successful organizations.

The evaluation report provides detailed feedback on ways to improve the delivery of the content, but more importantly, it captured the sentiments of the coaches and leadership staff who both expressed the conviction that the merits of the program suggested value in future research. That might be through reorganizing the class content, focusing efforts on the smallest members of TAM, or longitudinal comparative study of FAF and non-FAF museums to see what long term impact the program had. The project staff had multiple suggestions for ways to iterate and improve the FAF program. It is our hope, too, that this model might spark interest elsewhere in the country. There is nothing Texas-centric about the content, so state or regional museum associations elsewhere might find value in a similar approach to developing programs for their membership.

In closing, we would like to take the opportunity to thank the Houston Endowment for their project support and all the museums which participated in FAF2. Their determination and goodwill made the project work, and our appreciation for them is immense. Thank you.

## Leadership Team

- **Alex Freeman**, Executive Director, TAM, Austin
- **Ruth Ann Rugg**, Project Director, Director of Special Projects, TAM, Fort Worth
- **Emmy Laursen**, Administrative Support, TAM, Austin
- **Brittany Petrilli**, Administrative Support, TAM, Austin
- **Brian Crockett**, Lead Coach, Two-Headed Goat Consulting, Albuquerque
- **Noel Harris**, Coach, Consultant, Nashville
- **Deborah S. Howes**, Instructional Designer, Howes Studios Inc., New York
- **Ed Rodley**, Co-Founder and Principal, The Experience Alchemists, Boston
- **Kate Livingston**, Evaluation Specialist, ExposeYourMuseum, Denver
- **Koven Smith**, Content Development Specialist, Koven J. Smith Consulting, Austin
- **Kevin Diaz**, Media Specialist, Consultant, Austin
- **Katie Jackman**, Houston Regional Assistant, Hey Jackman Marketing, Houston

## Advisory Board

- **Dreanna Belden**, Assistant Dean for External Relations, University of North Texas Libraries, Denton
- **Kippen de Alba Chu**, Former Chief of Staff, Fort Worth Museum of Science & History, Fort Worth
- **Nik Honeysett**, CEO, Balboa Park Online Collaborative, San Diego
- **Hope Kandel**, Vice President, Partnerships, Credly, Los Angeles
- **Dr. Kim McCray**, Lecturer and Graduate Program Co-Director, Department of Museum Studies, Baylor University, Waco
- **Koven Smith**, Principal, Koven J. Smith Consulting, Austin
- **Dr. Holly Witchey**, Director of Education and Outreach, Intermuseum Conservation Association, Cleveland
- **Dr. Eric Lupfer**, Executive Director, Humanities Texas, Austin
- **Kathryn Mitchell**, Director of Education, The Grace Museum, Abilene

## Participants

- Columbia Historical Museum
- Galveston Arts Center
- The Health Museum
- The Heritage Society of Houston
- The Houston Fire Museum
- Humble Museum
- Lake Jackson Historical Association
- The Printing Museum
- Sugar Land Heritage Museum
- The Woodlands Children's Museum

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