

Strategy: So What?

Using the strategist's toolkit to help museums thrive

May 17, 2024

Today's presenters

- **Andrea Kalivas Fulton**, Deputy Director and Chief Strategy Officer at the Denver Art Museum
- **Andrew Cone**, Chief Strategy Officer at the Whitney Museum of American Art
- **Erin Prendergast**, Chief, Strategic Initiatives at the Art Gallery of Ontario
- **Hilary Branch**, Principal at H E Branch Advisors

former Vice President, Planning & Strategy at the Art Institute of Chicago



What we'll cover today

1. Definitions and framing
2. Institutional case studies
3. Group discussion
4. Q&A

What is Strategy?

Strategy is the practice of bridging a long-term goal with the plans and resources necessary to achieve it and a tool used to make decisions to keep moving in the direction of the goal.

Strategy is the path forward to achieving a specific goal.

Strategy Litmus Tests

A good strategy:

- Relates to your institution's mission, vision, and values
- Makes 75%+ of related decisions easy and obvious
- Drives toward a desired outcome

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Red herrings:

- If it doesn't drive a decision...it's a **principle** or **value**
- If it doesn't apply to more than one project...it's a **tactic**
- If it doesn't have compelling alternatives...it's a **best practice**

Why is this work challenging?

In general...

- Inertia and entropy are powerful forces
- Change is hard
- Strategy must be simple

Specifically in museum contexts...

- Professional and personal intermingle
- Definitions of success conflict
- Appetite for risk varies
- Teams are lean and overworked

Why should all museums create a strategy?

- When done effectively, an institution's strategy / strategic plan can:
 - Align the museum's activities with its mission in an ambitious and aspirational way
 - Respond to changes in internal and external contexts
 - Ensure long-term sustainability and relevance
 - Fundraise for key initiatives or capital projects
 - Build or strengthen key relationships
 - Evolve organizational culture and ways of working, e.g. cohere staff and Board
 - Ensure focus—all activities should be mission aligned

Case Studies

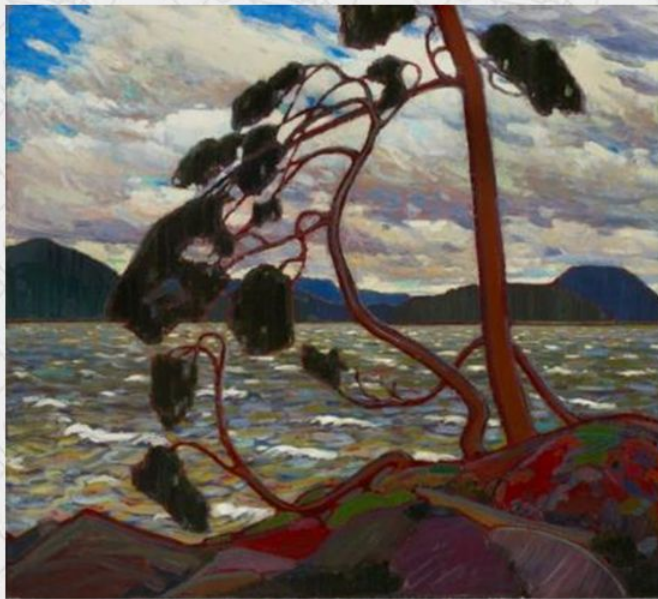
1. Art Gallery of Ontario: Reflecting our Community
2. Denver Art Museum: Welcoming to All
3. Whitney Museum of American Art: Latinx Art, Artists, Audiences
4. The Art Institute of Chicago: Exhibition Planning

Case Study:

Art Gallery of Ontario
Audience

The logo for the Art Gallery of Ontario (AGO) is displayed in white. It consists of the letters 'A', 'G', and 'O' in a stylized, modern font. The 'A' is a simple, bold, sans-serif character. The 'G' is a thick, rounded letter with a small gap at the bottom. The 'O' is a thick, rounded letter with a small gap at the top. The letters are set against a dark background with a repeating geometric pattern of interlocking squares.

Art Gallery of Ontario





AGO 2028 Vision:

The AGO will lead global conversations from Toronto through extraordinary collections, exhibitions and programs, and by reflecting the people who live here.



Our vision is anchored by our 4 pillars:

1. Art

We will strengthen our holdings through gifts from collectors; increase acquisition funds and endowments for extraordinary art; and commission art to enliven public spaces and further enrich our Collections.

2. The Dani Reiss Modern and Contemporary Gallery

We will build a new significant expansion and create additional exhibition space for our growing Modern and Contemporary collection to better reflect the cultures represented in Toronto.

3. Exhibitions and Programs

We will export Canadian content to inform global conversations and import culture to be the partner of choice for the world's leading art museums.

4. Audience

We will grow our audience and remain vibrant and relevant to them today, and in the future. We will have a lifelong relationship with all Ontarians and engage with Canadians and global tourists alike.

AGO Operational Drivers





Pillar 1: Art

AGO's Collection Strategy:

At the core of every great museum is its art collection. To ensure that the AGO's collection continues to be world class, a 5-point strategy has been developed. This strategy has guided the AGO over the past 5 years and will continue to lead us through to 2028.

Key tenets:

1. Acquire Masterworks
2. Selectively add significant collections
3. Diversify our holdings and add works from Global Africa and the Diaspora, works by contemporary Asian, Indigenous and women artists
4. Focus on globally important contemporary artists
5. Deaccession lesser quality works

AGO



\$35 for a full year of art at the AGO. That's less equals more. Introducing our new \$35 AGO Annual Pass – plus free entrance for everyone 25 and under.

LESS EQUALS MORE

DISCOVER THE NEW \$35 AGO ANNUAL PASS.
25 AND UNDER - FREE.

AGO.CA

Annual Pass Program

- **Free Annual Pass Holders (under 25)**
 - Free full year of admission
 - Removes financial barriers and encourages repeat visits during young adulthood

- **Paid Annual Pass Holders (25 & over)**
 - \$35 for full year of admission
 - Reduces financial barriers and encourages repeat visits





Our Audiences Have Changed

- 58% of our audience identify as non-white, which is 4% greater than the Toronto CMA (Census Metropolitan Area). That's a 37% increase in 8 years!
- 58% of our audience are in their 30s or younger. And 32% are millennials (25-39 yrs) – which is 35% greater than the Toronto CMA.

Annual Pass – Total Active Passes

26+ Annual Pass

25 & Under Annual Pass

Total

82,734

+

177,986

=

260,720

49,590

136,035

185,625

2022/23 Fiscal

Case Study:

Denver Art Museum Welcoming



DENVER
art
MUSEUM

Engaging Strategy to Create a Welcoming Museum





VISION 2021

The Denver Art Museum believes that art can make a difference in peoples' lives by celebrating and stimulating creativity and inspiring greater understanding and connection with our world.

By 2021, the DAM will support this as a beloved anchor in Denver's cultural and creative ecosystem, a national beacon for the ingenuity and boldness of our community, and a place that welcomes everyone.



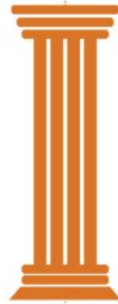
VISION 2021



CAMPUS



COLLECTION



COMMUNITY

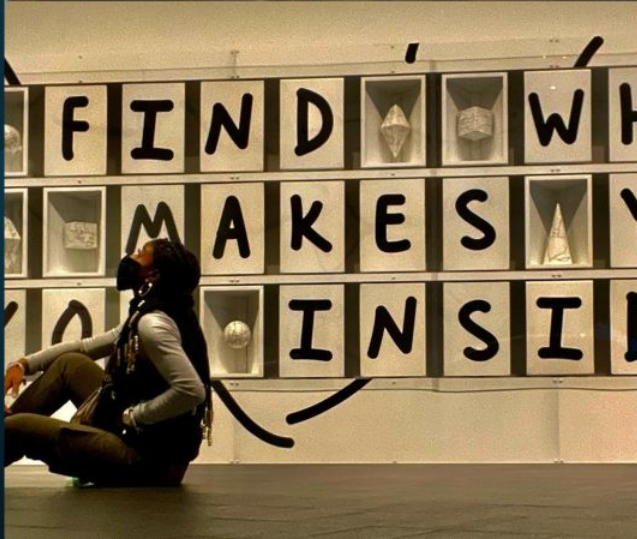


PROGRAM

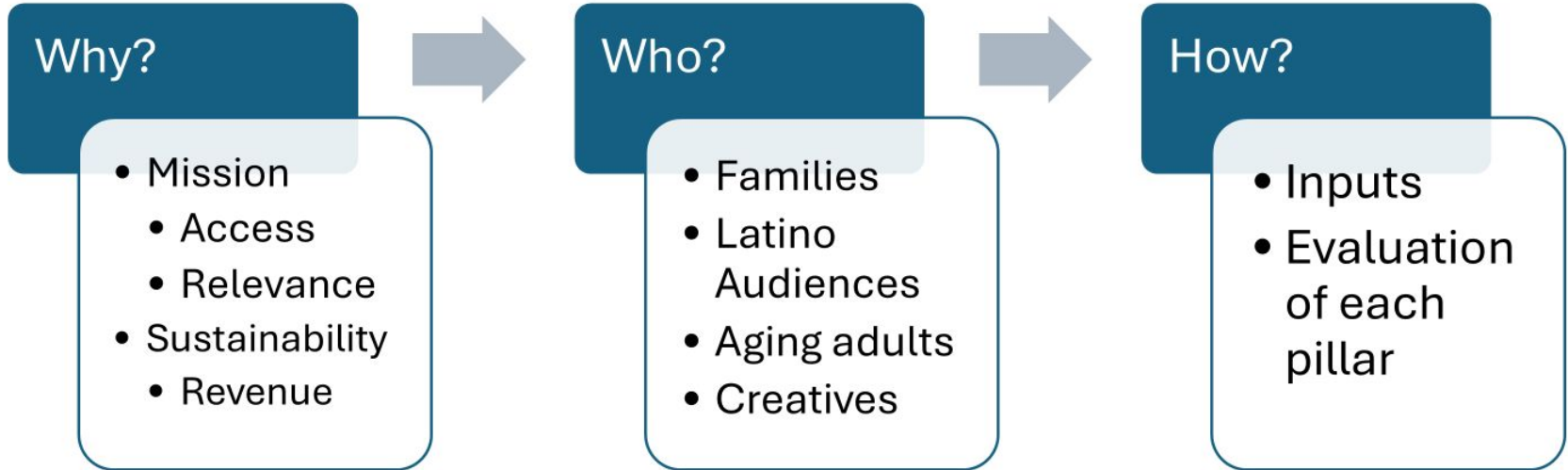


RESOURCES

Create an environment that welcomes and engages a broad spectrum of our community



Where to begin?



Inputs

Community Advisory
Groups
Surveys
Demographic data

Results:
Meet me where I am
Lower
barriers/intimidation
Be a resource
Give me a voice



Outputs



CAMPUS



COLLECTION



COMMUNITY



PROGRAM



RESOURCES



Outcomes



Case Study:

The Whitney Museum
of American Art

Latinx Art, Artists, Audiences

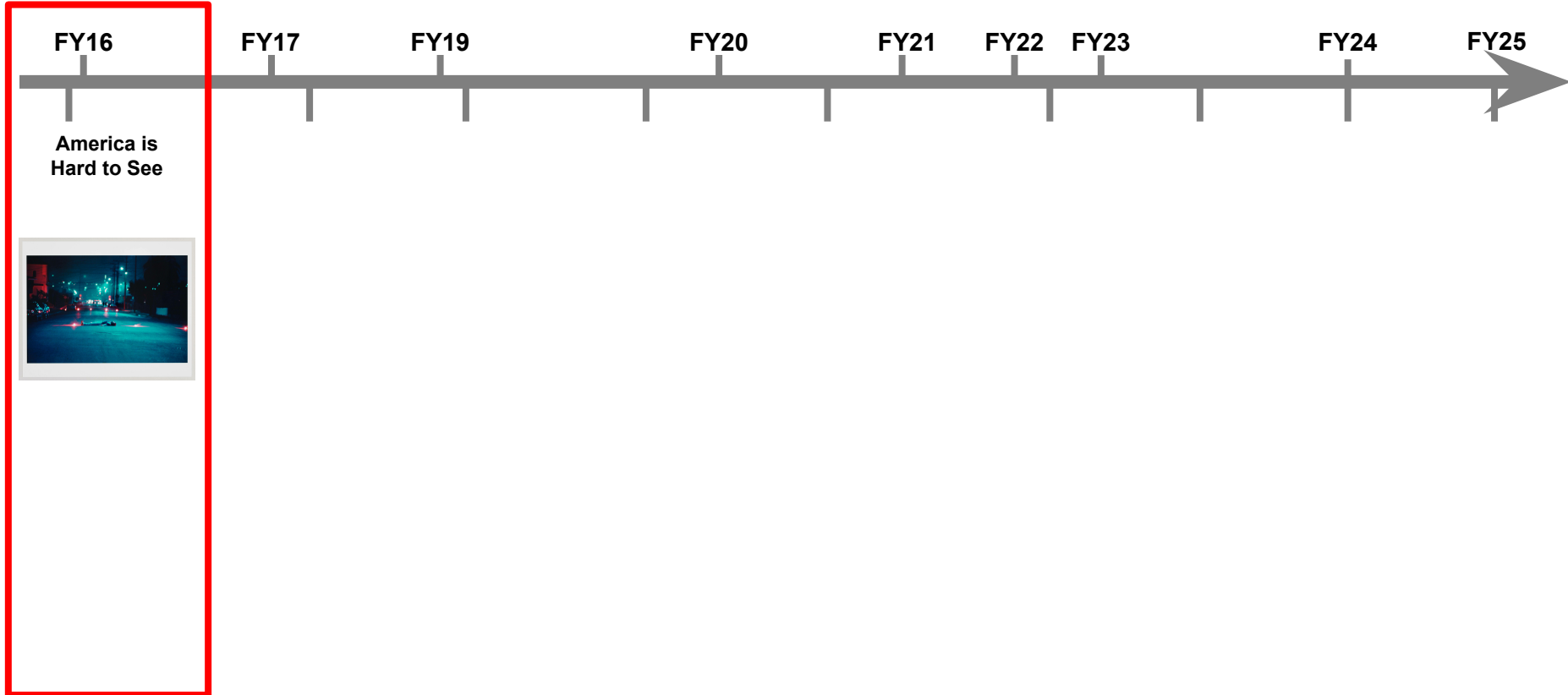
Strategy at the Whitney Museum of American Art



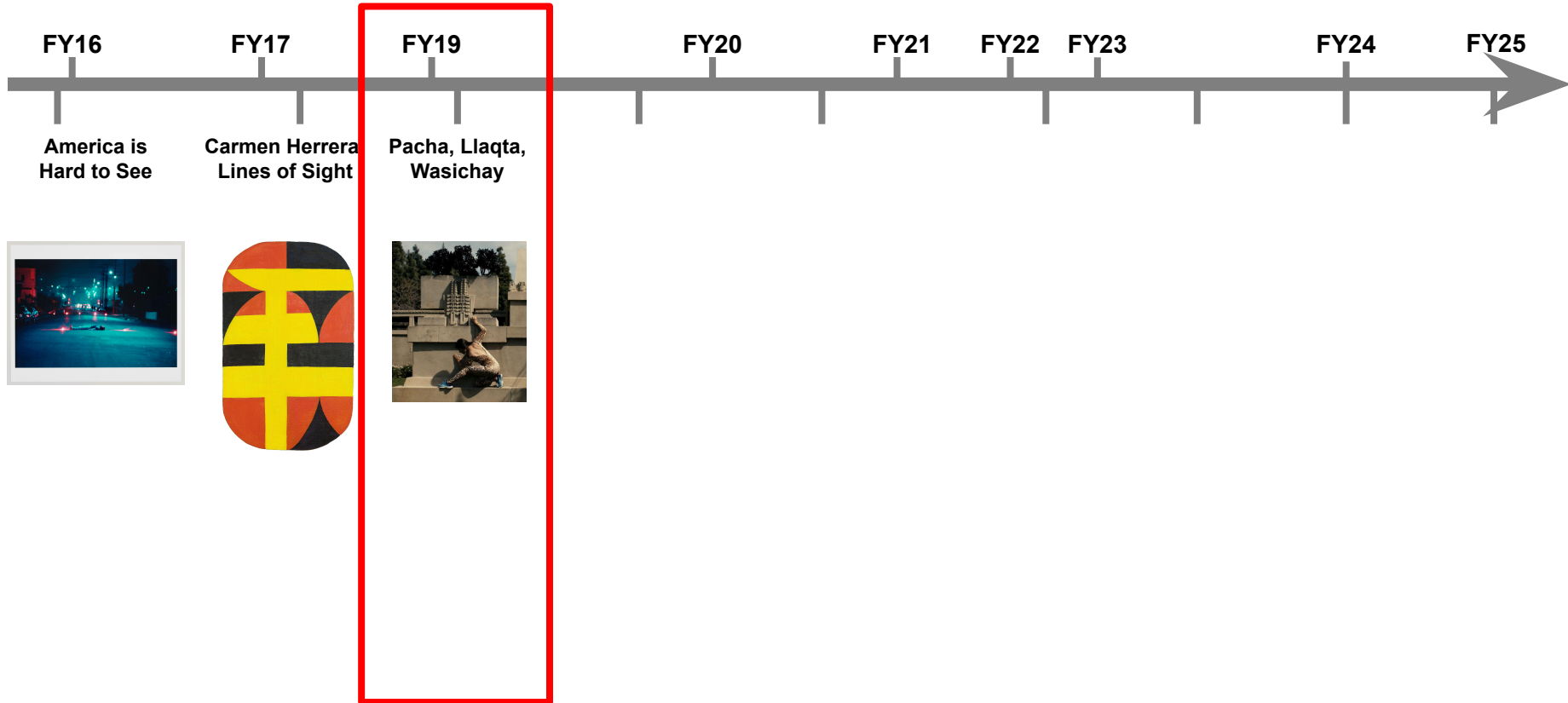
***How can a museum evolve artistic vision
into institutional strategy?***

***Specifically, how might a curatorial focus on Latinx art and
artists transform the Whitney Museum of American Art?***

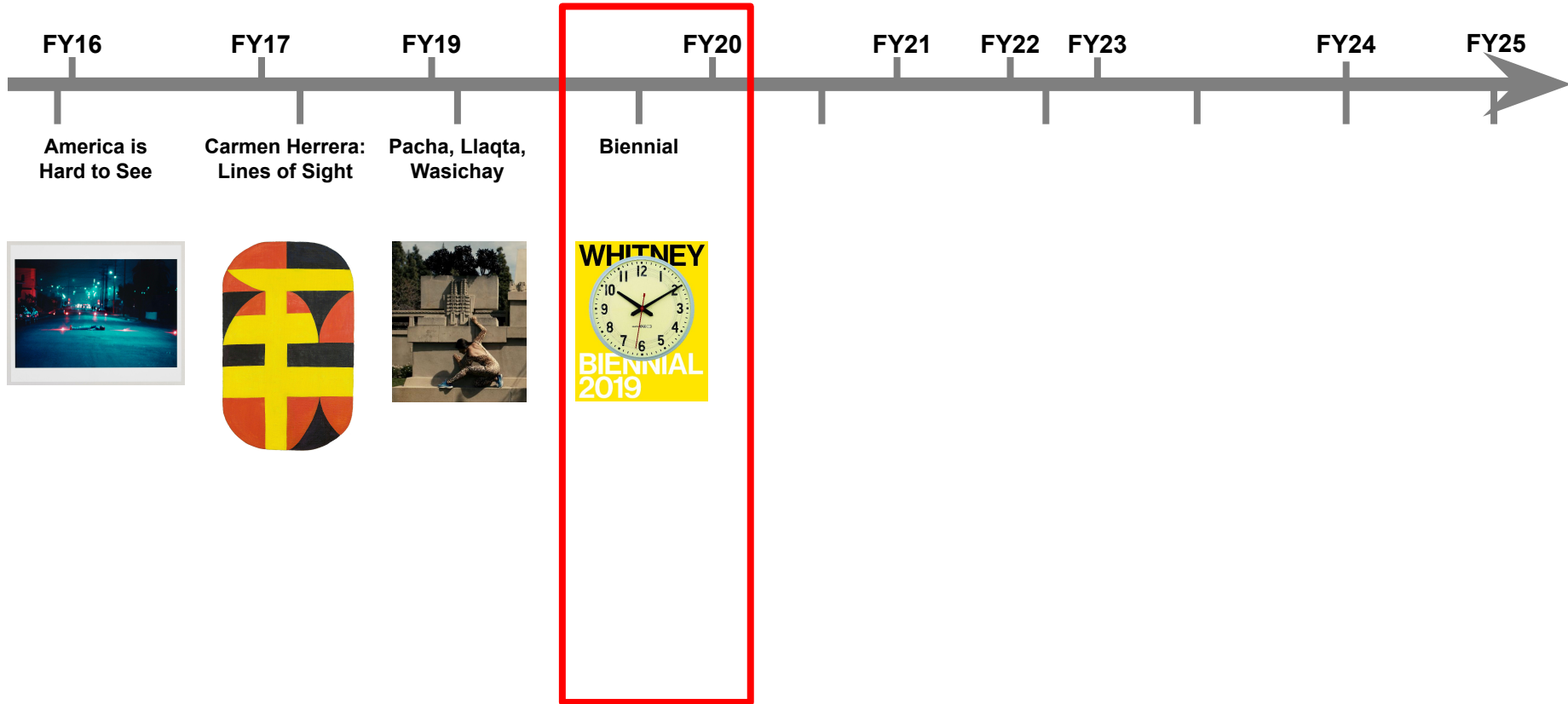
Our journey began with the opening of a new building



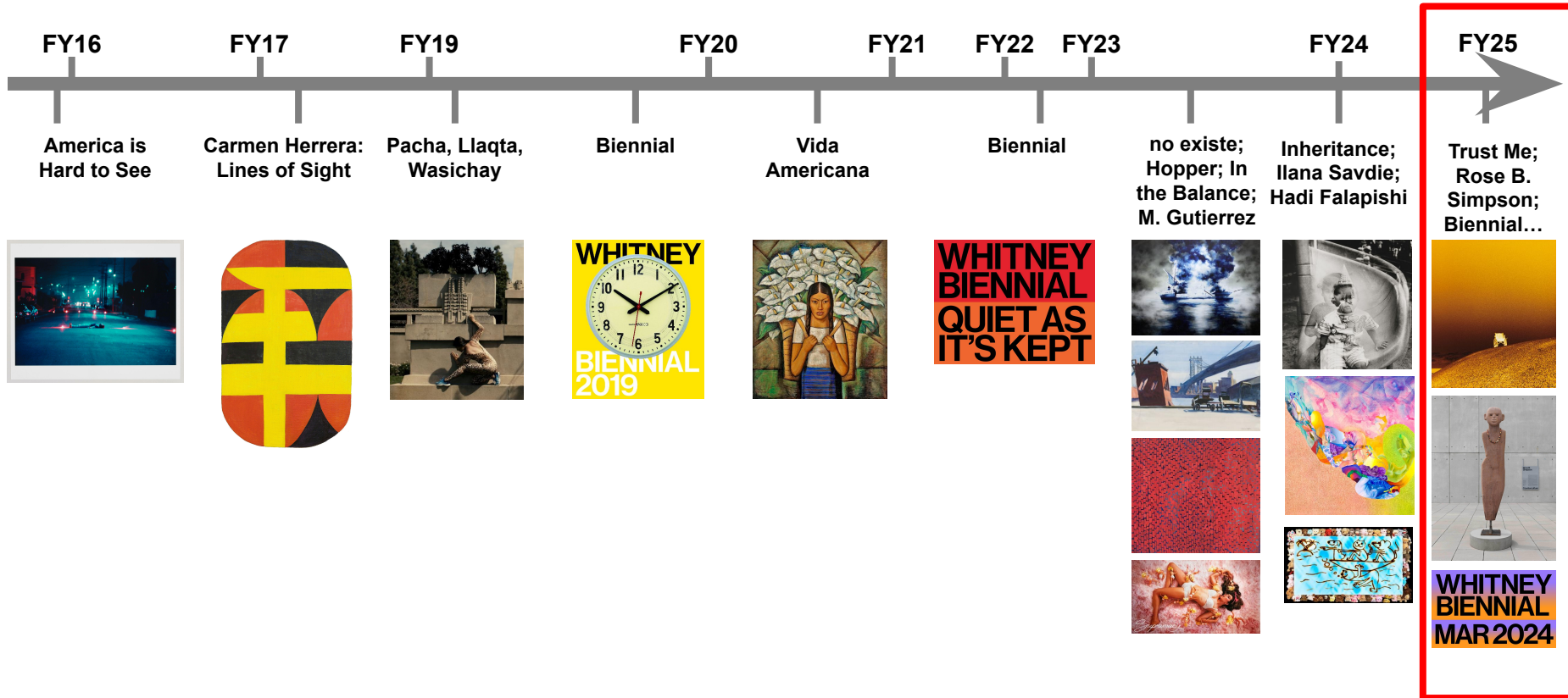
Artists and curators catalyzed our first bilingual exhibition



Education, MarComms expanded goals to include audiences

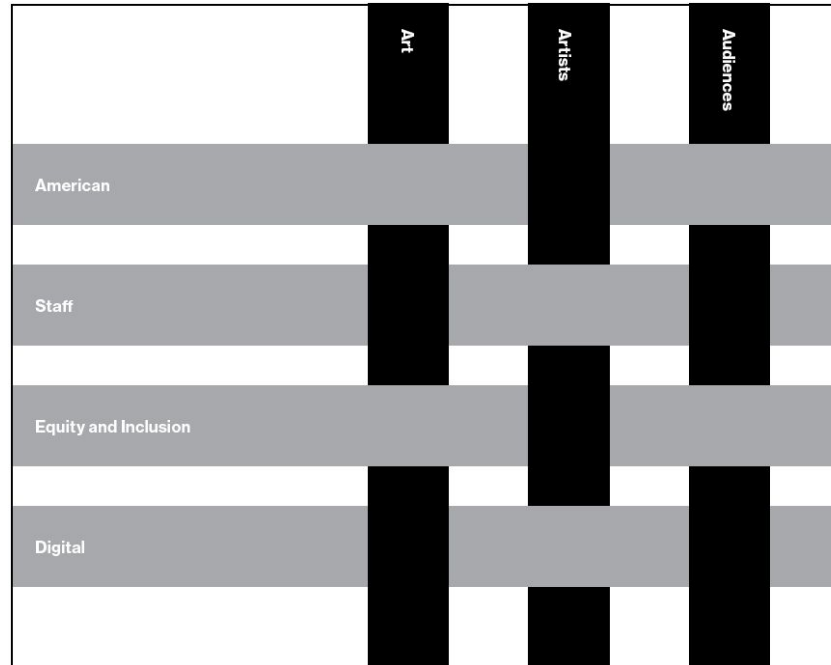


Today the entire museum is involved in this holistic work



We used our Strategic Plan as a compass, not a map

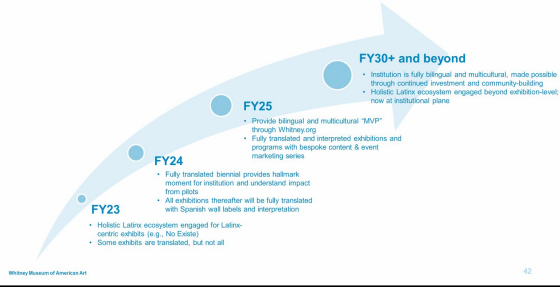
2017 Strategic Plan: The Cultural Village



Overview of strategy work over the past ~7 years

1 Strategic envisioning

High-level roadmap illustrates our journey through FY20+



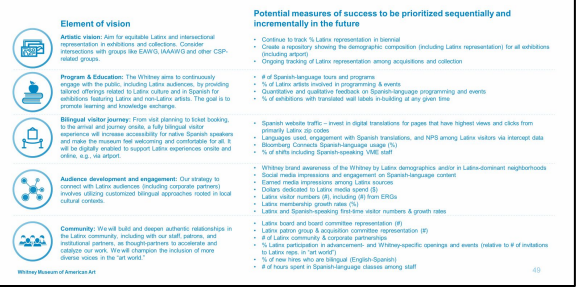
2 Case-making

We have many reasons to prioritize Latinx AAA strategy now



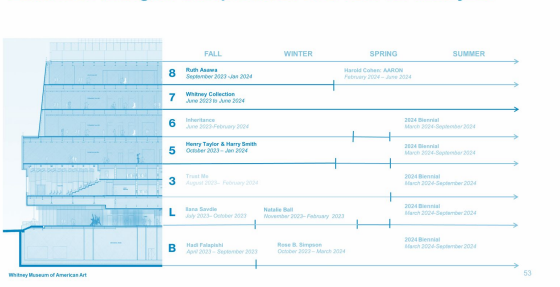
3 Success definition

Measures of success can evaluate progress on our strategy



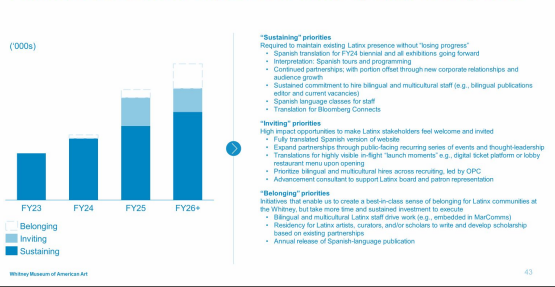
4 Operations, process mapping

Exhibition bilingual interpretation overview for next year



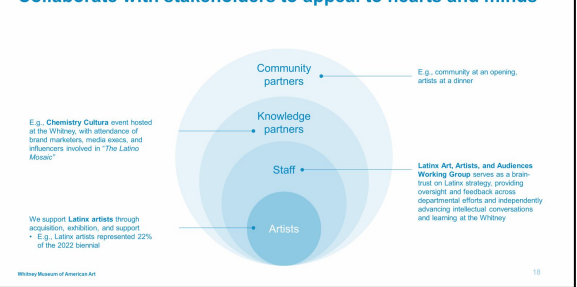
5 Financial planning

Financial investment expected to ramp up until steady-state



6 Change management

Collaborate with stakeholders to appeal to hearts and minds



The strategist's role stretches, shifts in response to needs

1 Strategic envisioning

High-level roadmap illustrates our journey through FY30+

**student
co-creator
architect**

multicultural, made possible
community-building
and beyond exhibition-level

Timeline with milestones through the Latinx
center exhibits (e.g., No Exit)
• Some exhibits are translated, but not all

Whitney Museum of American Art

10

2 Case-making

We have many reasons to prioritize Latinx AAA strategy now

**surveyor
synthesizer
logician**

Institutional
Reinforce our core
Whitney's mission
plan by promoting a
"bias of American
art"

community
Building, communities and
its connections about
a affiliation

The Whitney is already seen as a
leader in the space, with recent
momentum from No Exit and other
programming.

Maintain leadership position as top
institutions across the US and peers in
New York prioritize bilingualism

Bilingual strategy creates
opportunities via earned revenue and
contributed revenue from new donors,
corporate sponsors, and partners

Whitney Museum of American Art

10

3 Success definition

Measures of success can evaluate progress on our strategy

**researcher
quantifier
iterator**

Element of vision



Potential measures of success to be prioritized sequentially and
incrementally in the future

potential for all exhibitions

See and share from
exhibits via Instagram posts

connect neighborhoods

Whitney Museum of American Art

10

4 Operations, process mapping

Exhibition bilingual interpretation overview for next year

**operator
engineer
tactician**



Whitney Museum of American Art

10

5 Financial planning

Financial investment expected to ramp up until steady-state

**analyst
adapter
mediator**



Whitney Museum of American Art

10

6 Change management

Collaborate with stakeholders to appeal to hearts and minds

**mobilizer
evangelist
accelerator**



Whitney Museum of American Art

10

We are listening, measuring, and learning as we progress

Aspiration

A bilingual, multicultural Whitney with always-on Latinx engagement will consistently and authentically:

- expand inter-cultural learning and understanding
- lower linguistic barriers to entry and engagement
- become more relevant to a broader idea of “America”

Activities

- Focus of collection strategic plan
- Ongoing onsite exhibition presence
- Bilingual onsite visitor journey
- Spanish-language interpretation, tours, programs, digital content
- Latinx community and programming partners, expert advisors
- Spanish-language marketing, comms
- Spanish-language audience research
- Staff hiring, development, culture

Impact

Collection

from 62 Latinx artists / 171 works to 129 Latinx artists / 464 works

Visitors

from 10-15% Latinx to 15-25%

77% feel more positively about the Whitney seeing Spanish-language translations

Staff

from 11% Latinx to 15%

Case Study:

The Art Institute of Chicago Exhibition Planning



OP DOMINI

THE ART INSTITUTE OF CHICAGO

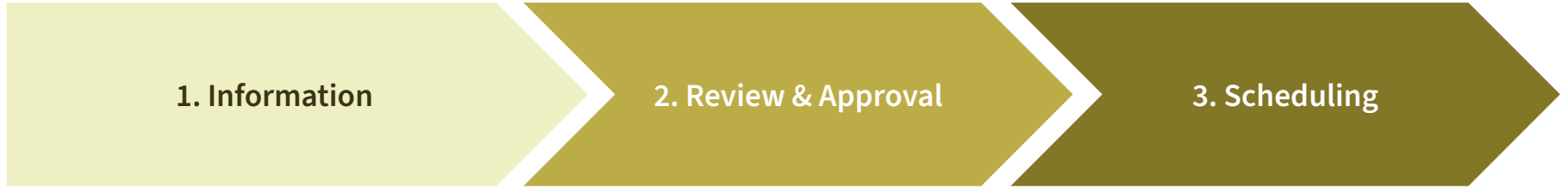
THE ART INSTITUTE OF CHICAGO
Housed in the historic
Chicago Stock Exchange
Building, the Art Institute
of Chicago is a world-class
museum of art and culture.
Open daily, 10am-5pm.

THE ART INSTITUTE OF CHICAGO

From the Strategic Plan:

**“Balance popular, scholarly,
and experimental exhibitions.”**

Theoretical New Process



Sample Scheduling Considerations

- Exhibition thesis
- Originating department
- Nature of the artwork
- DEIA commitments
- Traveling
- Cost
- Popular appeal
- Value of the artwork
- Time sensitivity
- Departmental workloads

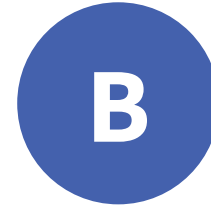
Three Categories of Considerations



Content



Logistics



Budget

New Process



Written form: completed by proposing curator.

- Content
- Provides upstream info for Logistics and Budget

Meeting: Interpretation, Publishing, Experience Design, Marketing & Communications, Engagement

- Content
- Provides upstream info for Budget

Meeting: Conservation, Collections & Loans, Exhibition Design, Finance

- Logistics
- Budget

Meeting: Director's Office, reps from prior two meetings

- Emphasis on Content
- Adds constraints based on Logistics and Budget

Meeting: reps from prior meetings

- Considers multiple projects at a time and develops balanced schedule
- Identifies additional resourcing needs

Impact

- Identified future resourcing shortfalls
- Re-scoped a planned exhibition, resulting in a \$1M+ budget lift
- Some processes, e.g. title discussions, kicked off earlier
- Reconceptualized the work of the Exhibitions team

Key Lessons

What We've Learned

- The No is just as important as the Yes—and in some ways, more important
- Strong change management is critical to the development and implementation of strategy
- Strategy does not always lead to a clear decision: sometimes it gives you the framework for discussion
- All of this—the strategy and the work it drives—is iterative and ongoing
- You don't need to be a topical expert to lead this work

Discussion

Q&A

Feel free to reach out

- **Andrea Kalivas Fulton, akfulton@denverartmuseum.org**
- **Andrew Cone, andrew_cone@whitney.org**
- **Erin Prendergast, Erin.Prendergast@ago.ca**
- **Hilary Branch, Hilary@HEBranchAdvisors.com**

Appendix: strategic frameworks, techniques, tactics

Tools and Processes:

- Market and Audience Research
- Financial Analysis
- Digital and Data Analytics
- Peer Benchmarking
- Landscape Analysis
- Institutional Assessment
- Scenario Planning
- Stakeholder Engagement (incl. internal stakeholders)
- Innovation, Experimentation, and Piloting
- Socialization, Communication, and Activation
- Capacity- and capability-building
- Metrics and Dashboards
- Retros and Post-Mortems
- Change Management
- ...

Examples:

- Change Management - [ADKAR Model](#)
- Idea proposals and decisions - [Art of Alignment](#)
- Landscape Analysis - [PESTLE Analysis](#)
- Institutional Assessment - [SWOT Analysis](#)
- McKinsey: [Role of the strategist](#)
- ...