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Executive Summary for the Summerlee Commission's Study on the Sustainability of History Organizations

The Summerlee Commission celebrates the hundreds of organizations and thousands of trustees, volunteers and professionals who preserve Texas history and make it available to the public. We also believe that too many of our history organizations are chronically underfunded and that there are probably more independent history organizations than can be realistically supported. To make more of our organizations sustainable for the long run, we will need better governed, better managed, more focused and more collaborative organizations.

Following are recommendations that should help improve the prospects for sustainability of history organizations.

1. Improve Governance

Governance training is something almost universally agreed upon by museums and funders alike. Most history organization boards will admit that this is a major need. Many foundation executives also cite this area as a major problem that they observe with history organizations.

There are several factors that make this difficult. One is that many history preservation groups begin as "causes" involving the saving of a beloved building or site. The founding board in these cases is super committed and will work night and day for its cause. After the passing of that first generation, a more traditional type of board member will usually take over. These newer board members will be drawn from the more common community circles that many civic volunteers come from. They are well meaning, but generally untrained as to their board responsibilities, and will be gone after their term of office.

Many board members themselves will readily agree that they need more training for what they do. A more difficult problem is the transient nature of boards. A well trained board this year will rotate out of office in a few years, necessitating a new round of board training. Outside observers working through the American Alliance of Museums' assessment and accreditation programs often cite the need for board training as a major need of the profession. How to address this issue? Some foundations, and organizations like the Center for Nonprofit Management (Dallas) offer training programs, but these take place far away from where the needs are most urgent--in the numerous small communities spread all through Texas.

The Texas Historical Commission is one of the few state agencies that address governance issues, but in order to be more effective in reaching communities in need, it will need a substantial increase in resources and personnel.

Recommendations:

- Organizations should consult best practices as articulated by the American Alliance of Museums and the American Association for State and Local History. Closer to home, the Texas Association of Museums and the Texas Historical Commission can provide help.
- Funding organizations should provide more direct support for strengthening organizations through board training opportunities in their regions.
- The Texas Historical Commission needs additional funding to reinstate its Museum Assistance Program, a valuable program that in previous years provided hands-on assistance to small organizations throughout the state.

2. Engage in Strategic Planning

Organizations need to be more purposeful about their activities, and to constantly evaluate and assess what they are doing. Boards need to engage in strategic planning, not just “logistics” planning for the next event. Strategic planning should assess the organization’s potential, its resources, and the context of its community. Planning need not result in a thick master plan that sits on a shelf. The process of planning needs to be so common that people no longer even think of it as a process. Planning should always start with a realistic review and assessment of the organization’s mission, as an outdated mission statement or a mission statement in dispute is often the root causes of many organizational problems.

3. Be Cautious When Beginning New Organizations

There has been a tendency in the history world for groups to found new organizations without sufficient planning for long term viability. Groups contemplating founding a new organization should consult the checklist in this report and engage in deliberate and realistic planning. Is this new organization really necessary? What role will it fill in the community that is not/cannot be met by an existing organization? How will the new organization be governed and financed in the long term?

4. History Organizations Need Government Support

The era of shrinking government responsibility for supporting culture and the arts makes it difficult to insist that history organizations need government support, but that support is needed now more than ever. Many history organizations began with significant city or county support, and even in cases where this support has declined, it is still important. The fact is that almost no successful and sustainable history organization exists without tax-supported support of their operations. Except in unusual circumstances, a history organization that is expected to survive solely on admissions income, events, rentals, and donations will fail. The museum and history fields need to continue strong advocacy at the state, county and city level to insist that tax support is necessary for sustainable history organizations. And, we need to make sure that those engaged in planning new organizations are aware of this fact.

5. Be Careful With Over Expanding Physical Resources

Too many organizations carelessly acquire new properties and large new collections without considering their capacity for caring for these acquisitions. The hazards of over expansion illustrate why engaging in planning and having policies in place to help make decisions is so important. Every new acquisition is a hungry mouth to feed that spreads precious resources. For those maintaining historical properties, the issue of deferred maintenance alone can sink an organization into financial ruin. Many organizations would actually increase their chances for long term survival if they were smaller and more focused, instead of growing or expanding.

6. Enter the Digital Age

In an era where most people get their information from the internet, it is surprising that so many history organizations continue to operate with little or no attention to their website. A website has moved well beyond being a digital brochure to being the most important gateway to an organization. Too many organizations have not paid attention to the incredible marketing and even fund raising potential of their websites. This is an area that has changed so quickly in the past decade that many smaller organizations are not even aware of how far behind they are.

Recommendations

- Boards and staffs should cultivate digital savvy members who are comfortable with social media, crowd sourcing, and other new ways of presenting organizations.
- Organizations should take advantage of training opportunities wherever they are available---at community colleges, museum and non-profit training seminars, and on-line opportunities.

7. Begin a Planned Giving Program

One area that more donor-based organizations should pursue is planned giving. History and preservation organizations have some of the most loyal and long-affiliated members of any museums in the country. A planned giving program can be as simple as reminding constituents of the need to make up a will, and to include their organization in it. While local churches, colleges, and social service agencies all do a good job in educating their constituents about legacy gifts, many history organizations sit on the sidelines. To make matters worse, many museums receive legacy gifts but immediately spend the funds on operating expenses or in acquiring an additional property that they can't afford to support. Building an endowment that would add to financial stability and permanence is a dream of most history organizations. Adopting a modest planned giving program is the most effective way for almost any organization of any size to accomplish this goal. It is worth remembering that endowments come from individuals, and building relationships with individuals---and being willing to ask for their support---is crucial.

8. Total Engagement With the Local Community

History organizations need to do a better job of being community citizens. The organization should reflect the community's demographics in its collections, programs, exhibits, and governance. Leaders of a history organization should also serve on other community boards. The history organization should be a source of pride, not for what it has done in the past, but for what it is currently adding to the community. Organizations that are totally integrated with their communities will not be allowed to fail.

9. Find More Ways to Collaborate

In many communities there are multiple history organizations. These groups often operate completely independently of each other, fragmenting an already small audience and pursuing limited resources in competition with each other. Even small communities can have ten to fifteen different organizations, none of which are working together. Those close to a particular history organization are well aware of what makes their group distinct from the others, but the public does not catch that nuance. Funders, who tend to think of history in broader terms than museum people do, have a hard time understanding how a dozen or more history organizations can each have a distinct purpose and each be worthy of sustaining. Organizations would do well to find more ways to work together, to share resources, and to approach common goals together.

10. Consider Mergers and Umbrella Groups

A logical step to consider in many communities would be to merge one or more history organizations. Mergers are large undertakings and are difficult to enact. Among the normal difficulties that one would expect with merging by-laws, financials, programs, and collections, there is often the overriding difficulty of merging different organizational cultures. Couple this with the tendency for people to see heritage in intensely personal terms ("their" heritage), and a normally complicated process can become almost impossible.

Forming an umbrella group is another possibility. An umbrella group could be a combination of existing museums which unite under an umbrella organization. The "parent" organization might handle certain functions for all of the museums, such as fund raising, marketing, and aspects of administration. Whether by merger or by strategic collaboration, more organizations need to find ways to combine forces.

11. Cultivate Strong Leadership and Plan for Leadership Transition

Organizations should extend every effort to cultivate strong leaders at the board and staff level. Strong leaders excel at crystalizing the purpose of an organization for the public, attracting other strong people to the organization, finding needed resources, and overcoming obstacles that cause other organizations to stumble. Organizations fortunate enough to find strong leadership also need to plan for the inevitable transition to new leadership, something that great leaders sometimes do not do. It is sad but true that the fortunes of many museums and

historical societies have risen with a strong leader, only to fade when that great leader eventually passed from the scene.

Related Issues That Need Further Study and Consideration

- The chapter dealing with the dissolution of non-profit history organizations raises the question of **what happens to historical collections when a museum or historical society goes out of business or simply shuts its doors**. The by-laws of most organizations contain a dissolution clause that specifies the collections should be distributed to other non-profit organizations in the event the organization dissolves. But what if this is not possible? What if there is no other suitable local organization? What if the group going out of business has debts that will require the sale of its historical assets?
- We recommend that further study be devoted to this issue so that additional guidance can be provided to organizations that need assistance. Is this a major issue now, or is it likely to be one in the future? Further study might determine this. Assuming that it is a real problem, some consideration should also be given to forming a statewide initiative to help museums and historical societies find suitable placement for artifacts and other collections that they can no longer care for.