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## Sustaining History Through Best Practices and New Approaches

Successful/sustainable organizations in many ways represent the opposite of the vulnerable organizations outlined in the previous chapter. Museums likely to succeed are not only positioned well by circumstances but are likely also “doing things right.” Following is a list of areas where they are likely doing things right.

### 1. Leadership That Has Transitioned Beyond the Founders

Sustainable museums have governance leadership **that has transitioned from the founding generation at least to the third generation.** We say third generation, because almost any museum can transition from the founding generation to a second generation. The vulnerable time for that second generation occurs when they attempt to transfer the vision and energy of a founding board to the next generation. An organization two generations removed from its founding has achieved its initial goals, spent all of the funds raised for the beginning of the organization, and must now define its own purpose and raise its own money. One of the signs of success for an organization is that its first generation of leaders has made provisions for a succession of leadership.

### 2. Governance According to Best Practices

Sustainable museums have governance **that operates within generally accepted best practices and operates from a set of adopted core documents: mission statement, code of ethics, strategic plan, and collections management.** An organization that has adopted these four documents is sending a strong signal that they have a clear agreement as to the purpose of their organization, are familiar with and support best practices with trustee governance, and observes best practices of the field with their collections of historical materials. **Successful organizations have effective boards that understand their roles and carry them out.** Unsuccessful organizations have boards that fail to understand their proper role, that interfere with management, don’t raise adequate resources for the organization, and don’t observe terms limits.

### 3. Attracts Strong Leadership and Transitions That Strong Leadership to the Next Generation

Successful organizations, especially in their founding years, benefit from strong leaders. If they have extraordinary leaders, they can accomplish extraordinary things. In fact, a very strong and effective leader can overcome almost every other difficulty or “vulnerable” characteristic mentioned in previous chapters. Effective organizations attract and enable strong leaders and then ride their coattails.

The only drawback of strong leadership is if the organization has not effectively planned for the next generation after this leader. There are many examples of museums whose fortunes rose dramatically under extraordinary leadership, only to fall back once that leader

departs. Strong leadership can make an organization sustainable in the short term but does not guarantee sustainability in the long term.

#### 4. Operates From a Business Plan and Is a Good Steward of Its Resources

Successful organizations **operate from a business plan**. The business plan has realistic strategies for generating revenue and tracking expenses. Unrealistic budgets will have large categories in their income line like “new grant revenue” or “10% increase in membership revenue.” A realistic budget might have some “stretch” numbers in it, but it will also have realistic numbers with actual plans for reaching those numbers.

A sustainable organization is one where both the board and staff agree on the business plan and work together to carry it out. The museum prepares and the board reviews regular financial reports and has an annual independent audit. A community must have complete confidence in an organization’s stewardship of its resources. This is even more important if public funds are part of the organization’s budget.

#### 5. Funds Come From a Variety of Sources, Including Some Government Support

**The dependable support from a city, county, or state government is a key factor in making a museum sustainable.** There are very few successful history museums in Texas that are not, in some way, supported by city or county general revenue funds, hotel occupancy taxes, or property taxes. Not only does this support provide a base level of funding that the museum can count on, it provides confidence in other donors that the museum is permanent.

**Museums do best when their funds come from a variety of sources.** Dependence on one main source of income, whether an annual fund raising event or an outdoor festival, is risky. History organizations’ revenue should reflect the diversity of their community, and a healthy organization has some government support, attendance revenue, membership revenue, annual fund revenue, proceeds from special events and festivals, local business support (both cash and in-kind), grant funds from local foundations, and revenue from endowment funds.

**The sustainable organization actively pursues planned giving,** and planned gifts are used to build and enhance an endowment. Many history organizations have little or no endowment funds, and no strategy for building them. Even fewer have active planned giving programs, even though these are relatively easy to begin and implement. History organizations are all about heritage and legacies, and they should exploit these concepts to their advantage.

#### 6. Thoroughly Engaged With Their Community

A sustainable museum is **thoroughly engaged with its community and this is demonstrated** in broad community financial, in-kind, and volunteer support. A sustainable organization provides as many educational services to its community as possible in the form of exhibits, programs, and events. This, in turn, builds community loyalty.

A sustainable museum can answer these questions in the affirmative:

- a. Does the organization show evidence of being a vital member of its community?
- b. Do board and staff members participate in other organizations?
- c. Is there obvious community support in the way of financial contributions and contributions of goods and services?
- d. Is the work of the organization designed to meet the needs of current visitors and local audiences, including new residents?
- e. Does the local school system support the museum by sending its students to it on field trips and/or are their ongoing relationships with area educators?
- f. Does the organization participate in History Day and/or look for ways to bring history to the community?

## 7. Collaborates With Everyone

The sustainable organization works with anyone and everyone in their community. They partner with local schools on field trips, collaborate with the local library on research projects and lecture series, join forces with the SPCA for a festival or event, enlist music organizations to hold performances at their venues, and more. The vibrant history organization is at the center of community activities to the point that they are seen as a leader in the community, and a vital part of its history. An organization that does this will not be allowed to fail.

### Examples of Organizations Strongly Engaged With Their Communities

“Community Engagement” has become a catch phrase in museum circles in recent years, as more and more museums discover the benefits---and necessity---of becoming indispensable members of their local communities. History organizations, often late to react to changes in the cultural landscape, have been comparatively late to see the benefits that many art and science museums have enjoyed in the U.S. and Canada in recent years, but there are now literally dozens of places to check out and possibly emulate. Here are just a few examples:

- **Brucemore**, a National Trust for Historic Preservation Property, is one of the more successful historic sites in the country in terms of its community involvement.

<http://www.preservationnation.org/travel-and-sites/sites/brucemore.html#.VYsTnrso6Uk>

- **Lower East Side Tenement Museum**, New York, New York. This museum tells the stories of 97 Orchard Street. Built on Manhattan's Lower East Side in 1863, this tenement apartment building was home to nearly 7000 working class immigrants. “They faced challenges we understand today: making a new life, working for a better future, starting a family with limited means. “The museum has achieved wide recognition, enormous visitation, and substantial financial support by doing many things

right, but also by being extraordinarily connected to their community.  
<http://www.tenement.org/about.html>

## **8. The Sustainable Organization Also Might Seek New Business Models, Explore Formal Collaborations or Even Enter In To Mergers With Other Organizations**

With the sheer numbers of history organizations in some cases outstripping the ability of their communities to support them, the sustainable organization should consider some new ways of doing business.

### **New Business Models**

Many cities and counties that own historic properties struggle with what to do with them. For many years the assumption was that every historic property should be a museum, but there is a growing sense that there are many other possibilities for these properties that can both preserve the appearance of the structure, but not necessarily be a burden. Historical organizations with visionary leadership can play a key role in helping to revitalize their communities while still preserving history.

There are several good examples of this revitalization, which were spearheaded by organizations willing to consider new business models. In 1973 the **Galveston Historical Foundation** established the Strand Revolving Fund which pioneered the use of historic easements on property that it acquired and then resold for redevelopment. This program and other GHF activities gradually transformed the Strand into the vibrant preservation and tourism magnet that it is today.

In Navasota, Texas, city leaders pondered what to do with the **Robert Augustus Horlock House**, a city-owned historic house museum that struggled for attendance, funding, and even purpose. In 2014 the Brazos River Arts Council partnered with the City of Navasota to create the Navasota Artists in Residence program to better utilize the historic home. The program was designed to encourage tourism, ensure preservation of the historic structure, create a meeting and event venue for the community, and help to grow the local arts community. For more information: <http://acbv.org/programs/artist-in-residence/>

### **History In Combination With Other Disciplines**

Stand-alone history organizations themselves are often not sustainable unless they benefit from a number of unusual circumstances. One way to preserve collections of important history materials is to fold them in to other non-history organizations such as science, children's or art museums, or libraries. While some history purists might feel that history takes a back seat to the dominant collections in these types of settings, they at least provide a stable and sustainable environment for the collections. Texas has some good examples of history collections that form a small part of a larger museum, such as the Fort Worth Museum of Science and History, The Grace Museum in Abilene, and San Antonio's Witte Museum.

**The Fort Collins Museum of Discovery**, in Fort Collins, Colorado, provides a good recent example of history folded in to a children's science museum, and also a museum that has extraordinary integration into its local community. This new museum is the result of a full merger of a small, private local history museum with a city-owned and operated Children's and Science Center. It is particularly interesting because, rather than have separate galleries for history, science, and children's exhibits, they have thoroughly integrated all disciplines within their exhibits. Liberal doses of science and history are enhanced with hands-on and immersive activities common to children's and science museums.

Their programming is very broad and eclectic. They serve around 100,000 people a year, with a \$2 million annual budget. City funds account for about half of their budget, 40% comes from earned revenue, and the final 10% comes from contributed funds. The museum shows great leadership in its level of community support and involvement, and has fully partnered with the Fort Collins community on its exhibit planning and programs, which serve a very broad audience. For more information, go to this website: <http://www.fcmod.org/>

### **Sustaining History By Mergers**

Concern over the large numbers of history museums, historic house museums, and historical societies has often led to suggestions that more groups consider combining forces, either by formally merging or by entering into strategic collaborations. A number of museums have combined forces in recent years, as well as several high-profile library/archive operations.

In the museum world, the Museum of the Confederacy and the American Civil War Center (Richmond, Virginia) formally merged in 2013 to form the new **American Civil War Museum**: <https://acwm.org/>

Cincinnati's museums have gone through a series of mergers over the past thirty years, with the **Cincinnati Museum Center** most recently combining forces with the National Underground Railroad Freedom Center in 2012: <https://www.cincymuseum.org/>

The **Rosenbach Library and Museum merged with the Philadelphia Free Library Foundation in 2013**: <http://www.rosenbach.org/learn/news/rosenbach-museum-library-completes-affiliation-free-library-philadelphia-foundation>

Mergers are difficult and complex to put together, and organizations might do well to explore strategic collaborations that stop short of full mergers. There are many good materials available to consult. An article by Martha Morris, "A More Perfect Union," is especially succinct and helpful. (1) In her article she notes "mergers can take different forms. Sometimes, several separate organizations dissolve to form a new legal entity. Other times, an existing nonprofit can acquire one or more others as wholly owned subsidiaries. These mergers usually include staff, facilities and/or collections. When the Baltimore City Life Museum closed in the 1990s, for example, their collections were transferred to the Maryland Historical Society. Similarly, the Phoenix Museum of History collections were subsumed by the Arizona Science Center in 2009."

Mergers are complex and emotional, often taking years to complete. There are considerable difficulties in merging board and staff cultures, not to mention fund raising events and community engagement activities. As Morris notes: “Mergers are not always the answer. A less complex approach is to create an alliance or collaboration among organizations to share services. In one successful example, the Tennessee Aquarium in Chattanooga has been providing administrative services to the nearby Hunter Museum of American Art and Creative Discovery Museum since 2001. The relationship extends to joint fundraising and marketing. Museums can also work together by collaborating on specific projects such as cross marketing, sharing collections, touring exhibitions or joint programming.

Whether merger, alliance or collaboration, the primary motivation is to build on strengths. All too often the opposite occurs, and mergers between two organizations are proposed when an executive director leaves, or when one of the organizations hits a financial low spot. A merger under these conditions threatens to combine two smaller and weaker institutions into one larger weak institution.

- **Sustaining History Through Strategic Collaborations Instead of Mergers**

Because of the complexity of mergers, many organizations instead are exploring strategic collaborations.

- **East Valley Museum Coalition** (Phoenix, Arizona). This coalition was set up in 2014 between the Mesa Historical Museum, the Chandler Historical and the Gilbert Historical Museum. In the wake of the closing of the Arizona History Museum in Phoenix, these three museums realized that their missions and collections were similar enough and yet complimentary enough that it would make sense to collaborate strategically. Stopping well short of a merger, the three have concentrated on collaborating on exhibits, collections emphasis (which museum is the best place for what collections), and educational programs. For further information:
- **Balboa Park Cultural Partnership, San Diego, California**, is an umbrella group of more than two dozen cultural organizations that share a Balboa Park location. They collaborate on education programs and symposiums, among other activities. For more information: <http://bpcp.org/>
- **Houston History Partnership, Houston, Texas**. This group has put together some on-line education resources and holds an annual history conference. <http://www.houstonhistoryassociation.org/>
- **Legacies Dallas History Conference, Dallas, Texas** is a collaboration of most of the Dallas area’s history organizations. Their major focus is an annual conference, which just completed its 19<sup>th</sup> year, and a history journal, Legacies, published twice a year.

- **Historic Germantown, Pennsylvania:** A Partnership of sixteen Philadelphia houses, destinations and museums, “Historic Germantown tells the stories of American Liberty and the everyday people who fought for it, reflecting a neighborhood of independence-seekers, community-builders, and American Dreamers.” Their vision statement: “Historic Germantown will be a leader in enhancing the economic and cultural development of our community through the collective voice of its member sites.” This organization was formed to deal with the situation where literally dozens of historic house museums, located in one economically challenged area, were struggling for survival.  
<http://www.freedomsbackyard.com/about/>

Footnote:

- (1) Morris, Martha. Museum (published by the American Alliance of Museums), July-August 2012. Martha Morris is associate professor and assistant director of the museum studies program at George Washington University and co-author of *Planning Successful Museum Building Projects*, Alta Mira 2009