

Sustainability Working Group

RECOMMENDATIONS REPORT

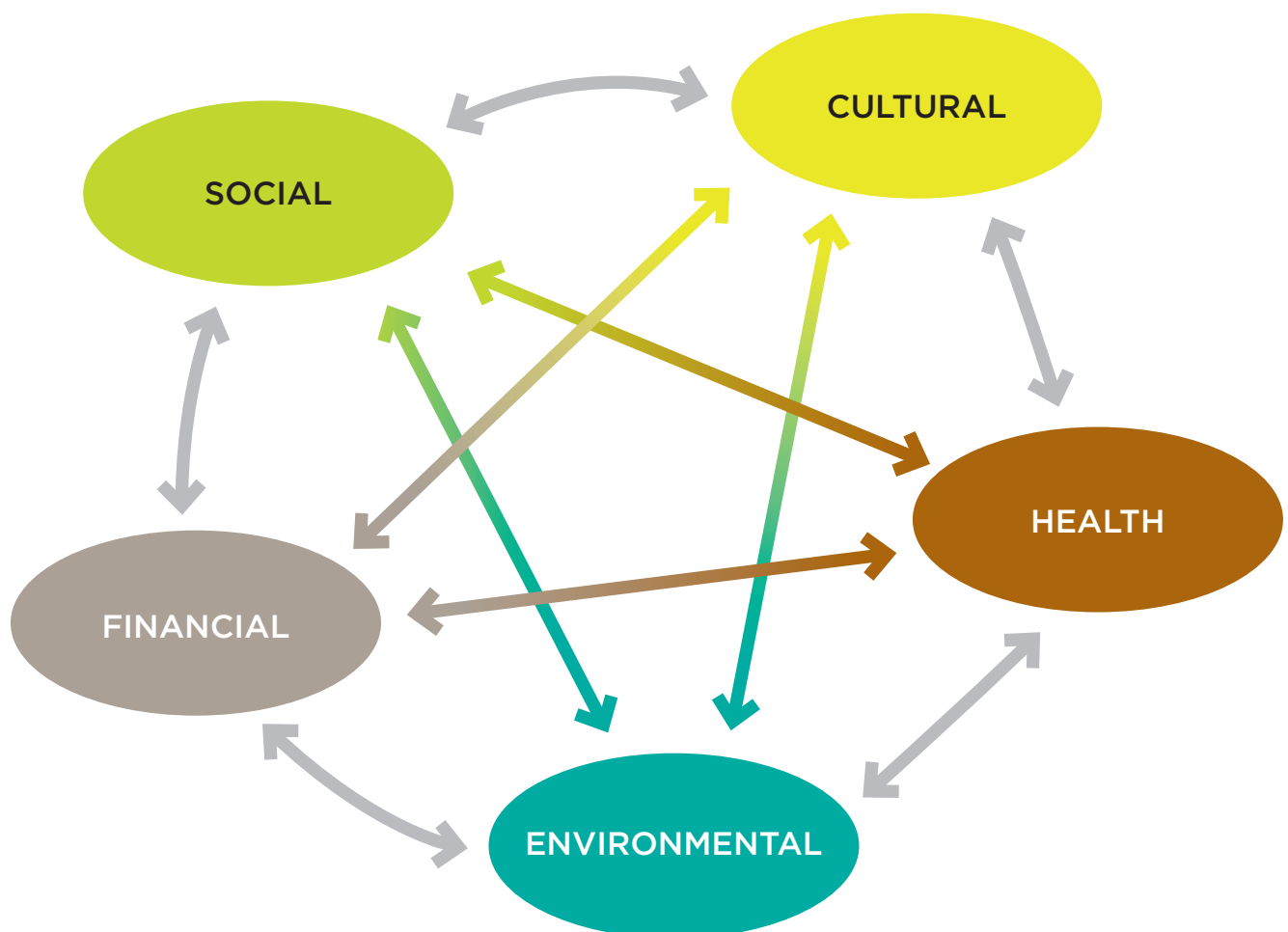


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INTRODUCTION

One of the essential elements for successful change management is “urgency.”ⁱ The museum sector, and the cultural sector as a whole, has reached a point where the need for change is urgent. The global economic reality, which impacts non-profit funding structures, demographic shifts, continuing new technologies, and global environmental issues, are all issues directly affecting the museum sector. The need for a new way of working has been discussed for many years: books have been written, articles have been published, and conference panels have been presented; but now it is necessary for the sector to act. To make this change successfully, it is imperative that it is done strategically and with the required supports in place to guide the process.

In order to be truly sustainable, an evolution / revolution must occur in how museums are valued in society. To do this, museums need to reposition themselves in their communities, develop better ways of operating, seek funding that supports long-term planning, and develop a strong strategic direction. Succession management practices also need to be put in place that reflect a changing workforce — both paid and volunteer. All of these elements are impacting the ability of the museum sector to be innovative, creative, and truly sustainable.

To begin to address these issues, the Alberta Museums Association (AMA) launched the Sustainability Working Group (SWG) in September 2012 and established an Advisory Council to direct its work. Six members of the AMA and three preeminent thought-leaders within the sector worked to develop a series of recommendations to focus on ensuring sustainable practice within Alberta’s museums for long-term viability, vibrancy, vitality, and future success.

The Recommendations that follow are targeted at museums, the sector as a whole, and the Association and address how individual organizations operate, their role within the sector, and how the supports provided by the AMA empower and encourage sustainable practices.

Words like “relevance,” “engagement,” “leadership,” and “social responsibility” are no longer catch-phrases; they are principles that must be integrated into a museum’s day-to-day operations. True sustainability will require museums to build on the systems and approaches that are currently in practice; but there is also an urgency to transform the way museums operate within their communities and will require a shift in thinking from funders, sponsors, donors, and visitors.

This report is a step in that direction.

“Sustainability is an orientation,
not a destination”ⁱⁱ

RECOMMENDATIONS REPORT

Recommendations:

Through self-assessment, planning, implementation, and review, museums are on an ongoing journey of sustainability. The key recommended principles underpinning these actions fall into three categories:

- > Leadership and Governance
 - *Innovation, flexibility, and risk taking.*
- > Organizational Agility and Efficiency
 - *Generative thinking, intelligent visioning, strategic foresight, and unique value propositions.*
- > Ethical and Social Responsibility
 - *Collaboration, identification, and addressing of community issues as part of a larger societal movement to create a better quality of life.*

The SWG examined the strengths, opportunities, aspirations, and results of individual museums, the sector as a whole, and the AMA in developing the following recommendations. These recommendations are to be viewed from the Five Facets of Sustainability: Cultural, Health and Well-being, Environmental, Financial, and Social.

MUSEUMS

- Build multiple and varied partnerships that are embedded within the community, thereby propelling the museum towards being a necessary service provider within the community and valued as such.
- Embed the facets of sustainability and relevance into the museum's values, foundational documents, planning, day-to-day operations and performance measurement, which will formalize sustainability's importance to the museum.
- Ensure the expectations of the community are reflected in the long-term purpose and planning of the museum.
- Ensure organizational structure and culture supports and nurtures leadership and succession at all levels, including board, staff, and volunteers.
- Understand the museum's internal and external environment and its impact on the organization.
- Commit to an ongoing critical, transparent, and honest evaluation of the museum and its environment to identify the museum's core purpose, opportunities, aspirations, communities, and relevance.
- Invest in the development of board, staff, and volunteers to ensure enjoyable and rewarding experiences, thereby contributing to ongoing succession management and a positive organizational culture.
- Provide sustainable living wages for museum positions.

- Demonstrate connections between history and contemporary life with every exhibit, program, and event.
- See the museum as integrated with the community and contributing to the quality of life of its residents and visitors.

MUSEUM SECTOR

- Embrace advocacy as an essential part of the work of museums.
- Benchmark sustainable practices from other sectors and demonstrate leadership in sustainable practices to other sectors.
- Recognize and use the potential and power of the museum's purpose in society.
- Work together from regional perspectives to engage in the unique stories of the people, places, and events of Alberta.
- Redefine partnerships for the sector and develop relationships between museums and multiple communities to build lasting and meaningful connections.
- Engage in ongoing monitoring of pressing societal and environmental issues of consequence in the museum's region and be proactive in local and regional dialogues about evolving wants and needs.
- Demonstrate the museum's value to society and support our communities rather than expecting our communities to support us.

ALBERTA MUSEUMS ASSOCIATION

- Inspire transformation by modelling sustainable practices and diverse partnerships.
- Provide examples of best practices related to sustainability and convey these to the membership.
- On the provincial level, advocate the value of museums to our communities and continue to promote the dynamic connections that are being made between Alberta museums and communities.
- Review and revitalize the Grants Program to focus on sustainable practice.
- Review and revitalize professional development and learning opportunities that focus on sustainable practices.
- Develop a self-assessment tool for museums to critically analyze their activities, practice and capabilities based on their stage of organizational life and empower them to plan their own journey to sustainability.
- Empower and promote transformative approaches to reduce current unsustainable practices and resource use.
- Encourage sharing of experiences, lessons learned, and expertise among the museum community and beyond to build capacity within the sector.
- Embody sustainability by engaging in the same processes asked of member museums.

Fundamental Assumptions AND Foundation Principles

In July 2011, the AMA Board of Directors approved the organization's Strategic Plan that laid the foundation for the Association's work over the following five years. The plan included a series of Fundamental Assumptions and Foundation Principles that reflected the dramatic shift in the world in which museums now operate.

These Fundamental Assumptions and Foundation Principles, along with the AMA's Strategic Framework, provided the basis for the establishment of the Sustainability Working Group and its Advisory Council.

FUNDAMENTAL ASSUMPTIONS

- All museums — regardless of size, location, focus, or stage of organizational life cycle — comprise the diverse museum community that the AMA serves.
- The future vitality of Alberta and its many communities depends on museums playing a stronger role in society and contributing to a better future and quality of life for all.
- Shared responsibility between the AMA's Board, staff, and membership is essential to achieve the goals put forth in this report and requires coming together to explore, discover, and co-create the solutions for the future health of museums.
- Organizational agility and flexibility, coupled with a rigor of challenging assumptions, contributes to a culture of responsiveness and vibrancy.
- Partnerships, alliances, and collaborative relationships will enable new possibilities and leverage combined resources for a greater result.
- New tools, technologies, and innovative approaches will be studied and employed to expand capacity of individuals, organizations, and communities.
- Creative and fresh ideas drawn from sources within and beyond the museum field are the fuel for expanding thinking and possibilities and are considered essential for vitality.
- Attentiveness to evolving external issues and trends requires ongoing monitoring to assure that the AMA and its membership have access to the information they need to make informed decisions and remain responsive and engaged with a changing world.
- Leadership and accountability are fundamental to the success of the AMA's strategic goals and the Alberta museum community.

FOUNDATION PRINCIPLES

The Foundation Principles outline the beliefs and commitments of the AMA Board and staff and guide the ongoing operation and leadership role of the AMA. The foundation principles are:

- Honouring the integrity of one another through respect and honest actions;
- Advancing high standards and excellence in museum practice;

- Advocating for the important role of museums in communities, the province, and beyond;
- Upholding the law, ethics, and professionalism in all we do; and,
- Operating with transparency and a cooperative spirit of engagement.

AMA Strategic Framework

VALUES

- Museums as agents of social change
- Engaged communities and a great quality of life
- Courageous and collaborative leadership
- Innovative and inclusive solutions
- Purposeful communication and meaningful connections
- A culture of inquiry and inspiration
- Dynamic learning and creativity
- Joy and collective celebration

VISION

The Alberta Museums Association is a leader and catalyst for dynamic connections among museums and communities.

MISSION

The Alberta Museums Association leads, facilitates, and supports museums in their vital role with communities.

ENDS STATEMENTS

Purpose: Museums are leading contributors to the social, cultural, and educational fabric of Alberta.

Empowerment: Shared information and resources contribute to a collaborative and robust community of museums and museum professionals.

Leadership: Leaders thrive at all stages of career development assuring succession for the future of Alberta museums.

Engagement: Museums are essential participants in creating vibrant communities and broad public engagement.

Sustainability: Alberta museums are supported at all stages of organizational life.

Definitions

The following definitions were developed by the SWG to provide further context and understanding for its work and to clarify the interpretation of museum sustainability.

MUSEUM SUSTAINABILITY

In alignment with the museum's values, vision, and mission, museum sustainability is demonstrated by organizational agility, community relevance, and responsiveness to the interconnected world in which the museum exists and the issues affecting its future.

Further definitions to provide clarity:

- **Values, Vision, and Mission**
 - > A museum's strategic direction and purpose needs to be directly linked to, and positively support, sustainability and social responsibility.
- **Organizational Agility**
 - > The organization is responsive to what matters to the museum and the communities it serves.
 - > Proactive — the museum anticipates where it is headed based on an understanding of the community's needs.
 - > The museum is resilient.
- **Community Relevance**
 - > The museum's ongoing relationships with its community have meaning and value (if relationships did not have meaning, the outcome / product will not have meaning or value).
 - > The museum reflects its current and future visitors and communities.
- **Interconnectedness**
 - > The museum is part of an ecosystem of interrelated networks and relationships.
- **Issues**
 - > Social, environmental, and community needs are identified and are in alignment with the museum's values, vision, and mission.

Museums act mindfully in the areas of sustainability:

- Cultural
- Health and Well-being
- Environmental
- Financial
- Social

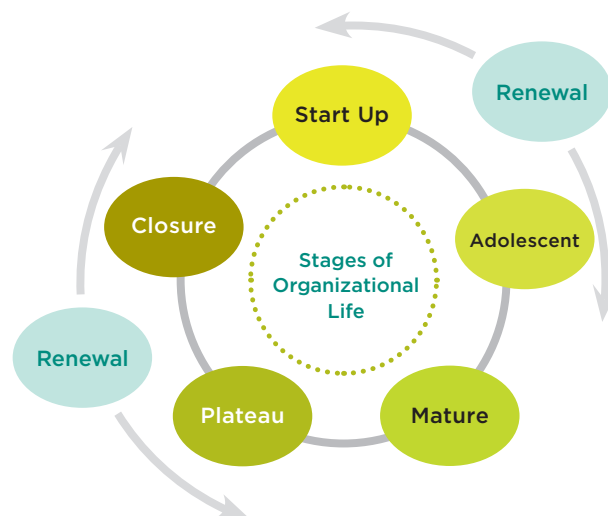
FACETS OF SUSTAINABILITY

***The following definitions provide context for “what” and “why” and the five functions of museums provide the “how” for the museum sector.*

- **Cultural sustainability:** working to ensure “the expression of a society’s aesthetic, moral and spiritual values, of its understanding of the world and of life itself; culture transmits the heritage of the past and creates the heritage of the future.”ⁱⁱⁱ
- **Health and Well-being sustainability:** refers to “the condition or state of being well, contented and satisfied with life ... Well-being (and so quality of life) has several components, including physical, mental, social, [intellectual], and spiritual. Well-being and quality of life are also used in a collective sense to describe how well society satisfies people’s wants and needs.”^{iv}; “a shared sense of meaning and purpose is the single attitude most strongly associated with community well-being. The process of arriving at collective meanings is central to the health of a community.”^v
- **Environmental sustainability:** working to ensure “the surroundings in which an organization operates, including air, water, land, natural resources, flora, fauna, humans, the built environment and their interrelations”^{vi} are supported successfully for the long-term.
- **Financial sustainability:** an “organization’s capacity to obtain revenues (grants or otherwise) in order to sustain productive processes (projects)... in order to produce results (accomplish the mission, goals or objectives).”^{vii}
- **Social sustainability:** “deepening and diversifying relationships, aiming to reflect the diversity of society in all that they do”^{viii}; engaged in socially responsible work that affects real social and environmental change with the potential to create public benefit on a larger scale.^{ix}

STAGES OF ORGANIZATIONAL LIFE

To support the AMA’s Sustainability Ends Statement (Alberta museums are supported at all stages of organizational life), the AMA developed the following definitions for a museum’s stages of organizational life.



DEFINITIONS:

Start Up:

- Established when a need is identified and a way to address the need is formulated. There is high energy and excitement.

Adolescent:

- Organization is between its third and sixth year, budget has grown, and programs have expanded. Structures are emerging and organization sees many possibilities.
- Instability can occur when systems are not in place to support the growth.

Mature:

- After five or six years of existing, organization achieves a balance between structure and support and energy and excitement. There is still room for improvement. Programs are established and well attended, operations are stable, volunteers and staff are constant, and organization is mission-driven. Organization works to maintain its Mature stage.

Plateau:

- Deterioration can occur rapidly, or take years. Board, staff, and volunteers are disengaged and operations suffer. Organization is focused on survival rather than purpose and developing audience and community presence.

Renewal:

- Board admits that the organization needs to be revived and that mission and operations have faltered. Disengaged board members, staff, and volunteers remove themselves. New processes and structures are considered.

Closure:

- Organization is not viable.
- Mission is no longer relevant. Organization is unable to operate effectively. Organization assesses itself and decides to shut down.

There can be nonlinear movement through the stages

Framework and Process - SOAR

Analysis of the current sustainability of Alberta's museums was based on their "SOAR" (i.e., their current and required **S**trengths, their key **O**pportunities, the SWG's **A**spirations for sustainable museums, and the **R**esults sustainable museums must show). This information will inform the AMA's analysis and prioritization of programs and services that will most empower Alberta museums to build sustainability.

The SWG's aspirations for sustainable Alberta museums focussed around themes of:

- being seen as vital, necessary, and active contributors to their communities' vibrant, healthy, and interdependent "ecosystems;"
- understanding and responding to the pressing needs of their communities through their numerous connections and networks where expertise, information, and resources are shared;
- organizing and governing courageously in order to embrace new, efficient, multi-disciplinary, and sustainable behaviours and practices that challenge museum tradition;
- building leadership capability at all levels of their organizations and extending it outwards to their communities; and
- thinking about sustainability well beyond financial survival by acknowledging that all facets of sustainability are interconnected; and that attention to community and social sustainability are key ingredients in a museum's financial sustainability.

Strengths: The sustainability of Alberta's museums will depend on developing strength and robustness in several areas. The SWG identified museums and non-profit cultural and arts organizations in Alberta and Canada that exemplified in some way specific "required strengths" or that showed considerable promise in these areas. These included: robust leadership models; agile planning approaches; vibrant networks; understanding and responding to critical community issues; building diverse revenue streams; and objectively analyzing their own strengths, capabilities, and stages of life. These demonstrated strengths of these institutions provide worthy benchmarks for all Alberta museums to adapt to their own unique situations.

Results: Alberta museums will know they are sustainable when they deliver concrete results in diverse areas. Although all museums are in different stages of organizational life — from start-up through adolescence, maturity, renewal, and closure — sustainable ones must become able to demonstrate results in each of the areas described by the five Facets of Sustainability: cultural, health and well-being, environmental, financial, social.

Opportunities: There are many opportunities for Alberta museums to build sustainability. In many cases, these are driven by the required strengths identified by the SWG and inspired by the Advisory Council (i.e., "required strengths" cited above). In others, they are mandated by key trends in our rapidly-changing environment. Opportunities in this latter category included: building governance capacity and integrating technology in successful execution of museum strategies.

This report contains the key recommendations of the Sustainability Working Group and will help guide the AMA's current and future operating plans and priorities as it executes its current Strategic Plan.

RECOMMENDATIONS REPORT

Thank you to the following participants for their significant contribution and commitment to this process:

Sustainability Working Group Members

- Linda Digby, Atlas Coal Mine National Historic Site
- Michael Dougherty, Roulston Museum
- Laura Gloor, Peace River Museum, Archives & Mackenzie Centre
- Allan Goddard, Breton and District Historical Museum
- Lisa Making, Royal Tyrrell Museum
- Monica Roberts, Fort Edmonton Park

SWG Advisory Council

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- i John Kotter, *Leading Change* (Boston: Harvard Business School Press, 1996), 21.
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 - iii Museums Australia, "Museums and Sustainability: Guidelines for Policy and Practice in Museums and Galleries" (Acton, Australia, 2003). <http://www.museumsaustralia.org.au/userfiles/file/Policies/sustainability.pdf>.
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 - v J. Hawkes, *The Fourth Pillar of Sustainability: Culture's Essential Role in Public Planning* (Victoria, Australia: Cultural Development Network, 2001).
 - vi Museums Australia, "Museums and Sustainability: Guidelines for Policy and Practice in Museums and Galleries".
 - vii P. Leon, *Four Pillars of Financial Sustainability* (Arlington, Virginia: Nature Conservancy, 2001).
 - viii Museums Association, "Sustainability and Museums: Your Chance to Make a Difference" (Discussion Paper. Museums Association: London, United Kingdom, 2008).
 - ix Alberta Museums Association, "Robert R. Janes Award for Social Responsibility" (webpage, 2012). www.museums.ab.ca.