



## **Museums Empowered**

Sample Application MA-40-17-0615-17

Project Category: Digital Technology

Funding Level: \$25,001-\$250,000

### **Mingei International San Diego, CA**

Amount awarded by IMLS:	\$125,867
Amount of cost share:	\$213,537

Attached are the following components excerpted from the original application.

- Abstract
- Narrative
- Schedule of Completion

## **MINGEI INTERNATIONAL MUSEUM**

### **DIGITAL TRANSFORMATION PROJECT ABSTRACT**

**THE PROJECT:** Mingei International Museum is requesting a Museums Empowered grant in the Digital Technology focus area for its two year DIGITAL TRANSFORMATION project. The total cost of the project is \$340,503, with a request of \$127,159 from the IMLS over two years. The Museum is planning a major transformation of its facility in San Diego's Balboa Park, and at the same time is poised to embark on a parallel Digital Transformation. This Digital Transformation Project will work from the inside out, first internally building staff capacity, then literacy of structures and systems to effectively deploy digital tools and content. In the first year, training and professional development learning opportunities for Museum staff will build capacity to understand and optimize the use of digital technology. By year two, staff will have the systems and skills to more effectively share the Museum's unique content assets with a broader audience.

**THE NEED AND HOW IT WAS IDENTIFIED:** The Museum recently engaged the Balboa Park Online Collaborative (BPOC) to perform an in-depth assessment of its workflow, technical infrastructure, use of digital tools and platforms and staff capacity to adopt and leverage technology. The BPOC Digital Strategy report found that Mingei currently has a "clear sense of identity and purpose shared wholesale throughout the museum" but there is much room to improve current practice and seek better ways to manage, track, communicate and leverage the work of the Museum.

**ACTIVITIES AND TIME FRAME:** This project will be a four-phase, two-year process. The first step is to start building capacity in staff to be able to focus on skills development and skills improvement. Capacity will be improved through: formal and informal training and skills development; the transition of manual processes to digital; process analysis to identify efficiencies; implementation of relevant technologies to support process changes; and creation of appropriate metrics to quantify the improvements at all stages. Capacity and skills improvement will not be segregated to just the first part of the work plan, but embedded within the culture of the Museum over time. The third and fourth steps are the development and implementation of Museum-wide initiatives to grow audiences and engagement.

**THE BENEFICIARIES:** The Museum staff will benefit from this Digital Transformation, and the growth in staff capacity and skill will then benefit the Museum's audience(s).

**THE OUTCOME:** Mingei International Museum will begin the evolution to an organizational culture that is adaptable and proactive, with a staff empowered to share content and embrace cross-departmental collaboration and transparency. Ultimately, Mingei's staff will be able to optimize digital technology, new learning and increased capacity to transform the Museum's approach to audience engagement in the lead up to the exciting unveiling of its transformed physical renovation in the summer of 2019.

**MEASURES OF SUCCESS:** At the conclusion of the Digital Transformation project, measurable results will include the following:

- Increased staff capacity for skills development and improvement
- The majority of staff members have received formal or informal training for at least one new digital tool or process, developing comfort and increased knowledge with technology
- Increased collaboration and efficiency in workflow/processes, transition from analog to digital
- The Museum's website and social media channels are part of an engagement pipeline that encourages audiences into successive, meaningful interactions
- There are standards and guidelines for data input and data sharing across the organization

## **PROJECT JUSTIFICATION**

Mingei International Museum is embarking on a major transformation of its facility in Balboa Park, one that will redefine the Museum's relationship to the Park, San Diego and the cross border region. This physical renovation plan expresses a dynamically renewed commitment to Mingei International's mission and the community it serves. With this transformation to a new building that opens invitingly to the Park and welcomes people in, Mingei International Museum is also poised to embark on a parallel **Digital Transformation**, one that will bring about systemic change at the Museum, creating an innovative and sustainable organizational culture that will radiate outwards, enhancing the Museum's capacity to engage with its audience and the community. The Museum respectfully requests a grant of \$127,159 over a two-year period to support this project.

This Digital Transformation Project will work from the inside out, first internally building staff capacity, then literacy of structures and systems to effectively deploy digital tools and content. In the first year, training and professional development learning opportunities for Museum staff are critical to understand and optimize the use of digital technology. By year two, staff will have the capacity, literacy and skills to more effectively share the Museum's unique content assets with a broader audience.

**Need/Challenge** - The Museum recently engaged (beginning in September 2016) the Balboa Park Online Collaborative (BPOC) to perform an in-depth assessment of its workflow, technical infrastructure, use of digital tools and platforms and staff capacity to adopt and leverage technology. The outcome of BPOC's work can be seen in the attached Digital Strategy document. The two-year project outlined in this grant proposal is a tangible short-to-medium term plan that addresses the needs and opportunities outlined in the Digital Strategy document delivered by BPOC. The BPOC Digital Strategy report found that Mingei currently has a "clear sense of identity and purpose shared wholesale throughout the museum" but there is much room to improve current practice and seek better ways to manage, track, communicate and leverage the work of the Museum.

**Internal challenges:** BPOC consultants observed that content across the Museum often exists in silos and is not broadly available among staff, creating obstacles to effectively sharing collection and exhibition information. There is an inconsistent comfort and knowledge level with technology throughout the organization and analog workflows in Museum departments obscure the potential for collaborative processes. The report also found a lack of standardization and guidelines in data input and data sharing.

**Engagement (external) challenges:** The Digital Strategy report also found areas in which the Museum staff can vastly improve efforts in external engagement. Visits to [mingei.org](http://mingei.org) are proportionally low compared to physical visitors (about 1:4 against an ideal of 2:1), and its email list size is stagnant along with attendance. Other needs identified include: improving social media skills, efforts and reach, creating a comprehensive SEO strategy (grounded in achievable goals), leveraging the website to more proactively connect audiences digital content, and maintaining connection and access with current audience during the Museum closure.

**Who Will Benefit** - Both areas of need, internal and external, will require additional resources to address a careful plan for implementation – one that integrates steps that touch every department in the Museum. The adoption of a digital strategy across all departments will greatly benefit the Museum staff, helping to foster an organizational culture that is adaptable and proactive. Professional development and training opportunities

will build the confidence and capacity of individuals, and the integration of content sharing tools will create efficiency. Greater collaboration will be realized through data and information sharing, and eventually, time savings found through process efficiencies will generate capacity for trying new projects and ideas.

Change management requires inclusion and communication. Almost every full-time staff member at Mingei was engaged directly by BPOC staff for input and feedback in the process of creating the Digital Strategy report. Nik Honeysett, executive director of BPOC, presented the project to the entire staff at the start of the process. At the conclusion of the project, the final product was again presented to all staff. Next month, Honeysett will present the completed Digital Strategy to the Museum's Board of Trustees, closing the loop of presentation and feedback at all levels of management and staff. There is passionate advocacy for the plan at all levels of the organization and the project will continue to rely on broad staff buy-in and engagement.

The benefits for the internal audience will aid in the smooth transition to the second phase of the project, in which the staff optimizes new learning and increased capacity to transform the Museum's approach to audience engagement in the lead up to the exciting unveiling of its transformed physical renovation in the summer of 2019. As the Museum has shared the news of its coming renovation closure, members, docents, volunteers and visitors, have expressed hope and concern that the Museum will remain accessible during this time. This will be partially addressed through offsite exhibitions at other locations around the county during the closure. However, this feedback was another important reason to create a strong, accessible and mission-centric digital presence while the physical Museum is closed.

**Advancing the Strategic Plan** - The Mingei Strategic Plan outlines an increasingly transparent, efficient and expanded Museum, both internally and externally, with the enhanced and improved digital infrastructure and engagement as a key component of the Museum's evolution. The Museum's Strategic Plan expressly states the Museum will focus on "expanding use of technology (collections' digitization, exhibition interpretation, social media, institutional infrastructures)," and "expansion of the Museum's web presence." Specific goals in the Mingei Strategic Plan that tie into the Digital Strategy Project include increased membership and attendance (products of increased audience engagement) and the growth and accessibility of the digitally-imaged collection (all measurable). The Museum's current year operating plan also has a specific goal to develop a Museum-wide digital strategy, and the first step has been taken with the attached BPOC report.

A stated goal of the Museums For All special initiative and the Museums Empowered Digital Technology focus area is: "training and professional development learning opportunities for museum staff to fully explore, understand and optimize the use of digital technology in museums." The Mingei International Museum Digital Transformation project addresses this objective exactly. The project will cut across all of the Museum's departments resulting in systemic change, building the professional capacity of Mingei staff to enable them to keep pace with technological advances in the sector and beyond. As noted in the BPOC Digital Strategy plan for Mingei: *"The strategy documented here looks to divert or plan for resources to focus on the accuracy of collections documentation, generate more interpretive and descriptive content, better leverage social media and other digital platforms to attract new audiences, and evolve a sustainable culture that is always looking for opportunities to create stronger connections with audiences."*

**PROJECT WORK PLAN**

This project will be a four-phase, two-year work plan:

Year One			Year Two		MEASUREMENT      V
Internal: Capacity Building					
	Internal: Skills Improvement				
		Audience Engagement: Identification & Planning			
			Audience Engagement: Implementation		

The first step is to start building capacity in staff to be able to focus on skills development, followed by skills improvement. BPOC will be engaged to guide Museum staff through a structured plan based on the Capability Maturity Model, which creates systematic and sustainable process improvement. Capacity will be improved through: formal and informal training and skills development; the transition of manual processes to digital; process analysis to identify efficiencies; implementation of relevant technologies to support process changes; and creation of appropriate metrics to quantify the improvements at all stages. Capacity and skills improvement will not be segregated to just the first part of the work plan, but embedded within the culture of the Museum over time.

The third and fourth steps are development (identification and planning) and implementation of Museum-wide initiatives to grow audiences and engagement. These two phases will overlap for an iterative approach with measurement and feedback as guiding principles. Staff will leverage the Museum's virtual presence, primarily its website and social media channels, to support an engagement pipeline that encourages audiences into successive, meaningful interactions. The focus on social media and the Museum website is grounded in data from the current National Awareness, Attitudes and Usage Study of Visitor Serving Organizations (NAAU), which supports the idea that custom mobile applications may be an expensive distraction for audiences, but modest investments in web and social media can improve reputation and satisfaction.

**Activities** - Activities to be undertaken throughout the project are outlined below. These activities are primarily based on the attached Digital Strategy document, completed by BPOC in March 2017, which identifies the specific short, medium and long-term objectives to be carried out in pursuit of our digital strategy goals. Museum staff identified and prioritized key tasks and activities in the Digital Strategy document and helped create this project plan.

**YEAR 1 – Create capacity and efficiencies in workflow and establish core staff competencies and skills necessary to effectively utilize digital tools and platforms, implemented through formal and informal training and professional development:** Engage BPOC to provide workflow consultation and training; focus on creating capacity through improving processes and socializing productivity tools (these first two activities will be ongoing throughout the project); provide training on new content sharing platform and other tools; develop shared responsibility for the integrity of data and information; partner with SDMA and MOPA to create an EmbARK user group, pooling resources to provide training and support across the three institutions; apply new content process to an upcoming exhibition; provide social media training for key staff.

**YEAR 1 – Create and adopt processes and guidelines for exhibition and collection documentation, object digitization and shared content:** Transition exhibition content assets – including schedule, object checklists, photography and more – from existing silos to an accessible, shareable content platform (such as Google Drive

or Airtable); implement a pipeline that allows for seamless online publishing of content to mingei.org; draft updated digitization plan including staffing, resources and timescale; define photography standards for consistent photo/video of objects; implement digital condition reporting application; create a content strategy to deliver collections, programming and educational content to digital platforms.

**YEAR 1 & 2 – Strengthen technology infrastructure to support institutional priorities for managing content, integrating cross-department processes and delivering seamless digital experiences:**

Increase EmbARK licenses to support editorial, cataloging and cleanup requirements; Purchase equipment to support digital condition reporting; Purchase new camera and lenses to capture high-res photos and video; Engage website developers to implement new or to improve existing digital content that will enhance and increase the engagement with online audience; Identify and purchase workflow tools and platforms (such as AirTable, Tableau, Slack, etc).

**YEAR 2 – Create an internal content pipeline to share rich, diverse content and media, presented across a variety of digital platforms, which allow the audience/visitor to “skim, swim or dive.”**

Create YouTube channel; ensure other platforms and channels are demographically aligned; train staff to produce/share short videos to enhance or promote exhibitions; increase social media activity, promoting discovery through serendipitous tagging and hyperlinking; leverage content that promotes objects, artists, behind-the-scenes activities and unique merchandise; pivot the Museum’s website and email content from static information to integrate photos, videos and dialogues on social media; plan and implement a comprehensive SEO strategy; add interpretive text to collection objects; cultivate digital ambassadors and advocacy from social influencers.

**Measurement & Evaluation** - Throughout the two-year work plan, Mingei International will file interim and final reports with IMLS according to the schedule provided with the grant award. Also throughout the project, there are three key areas through which performance will be measured and evaluated:

- 1) The Museum relies on a set of quarterly metrics to monitor key projects and indicators throughout the organization. This culture of evaluation will also be applied to track and manage the Digital Transformation project: new metrics will be added to the Museum’s metrics spreadsheet and staff throughout the organization will track and review progress.
- 2) Growth in capacity and skills development will be evaluated in annual performance reviews for individual staff members, and activities from this work plan will be included in annual performance goals across the organization. In addition,
- 3) Museum finance and development staff will track key spending and reporting milestones on a monthly basis, ensuring the work plan is adhered to in the most practical terms.

**Risk** - The primary risk to this work plan is the challenge of adaptation. Fostering systemic, organizational change is always a challenging process, and in addition to the Digital Transformation the staff will be impacted by the Museum construction and closure related to the physical transformation project. In order to mitigate this risk, the Museum’s leadership team will be working with an executive leadership coach during the first year of this grant (covered by a different funder), enabling them to seek support and guidance in modeling and communicating cultural change. Other mitigating factors will include the deep involvement of the Museum’s mid-level managers, as well as a focus on recognizing and celebrating incremental change.

**Who Will Implement** - The BPOC Digital Strategy recommendations identified the requirement for more formal expertise in project management. During the capacity and skills improvement phases, the majority of staff will become acquainted to the benefits of a more rigorous and reproducible approach to project management, and key staff will be identified to focus on developing more advanced skills in that area. Project

planning will be led by a cross-departmental group of mid-level managers, who will be supervised by the Museum's four-person leadership team. Work assignments will be directed by the senior managers of the leadership team and overall project management will be led by staff identified in earlier phases. Most Museum staff will be involved in some aspect of project implementation.

Mingei International will also re-engage Balboa Park Online Collaborative, a technology non-profit consultancy that provides support, development and strategy. Led by executive director Nik Honeysett, an expert and thought leader in the field of museum technology, BPOC will provide the framework and expertise needed to guide Mingei staff through the project, illustrate and share best practices and provide training and technical advice. Other project contributors include a photographer (Katie Gardner) and a web design team (Dalton Rooney and Stacey Edelstein of Raygun) along with staff from Embark and the Museum's IT provider to augment the project team as well as volunteers and interns.

The Museum's Digital Transformation plan amounts to \$340,503 in personnel, contractors, supplies and equipment and other resources that are needed to complete the proposed two-year project. The \$127,159 provided through this grant will be used to cover a portion of salary costs; to pay project contractors including BPOC, Raygun, a photographer and SDTEK; and to invest in technology applications and equipment to support the project (details in attached budget). Mingei International will provide a cost share of \$213,344 which includes Museum personnel time, support from volunteers and interns, computer work stations, database license fees, baseline web development fees, baseline IT support and server maintenance fees.

**Tracking Progress** - This project focuses on internal and audience-facing initiatives and will require both internal and external evaluations:

**Internal** – Some of the key internal tenants of this project are capacity building and process improvement, which are achieved through consistent measurement and evaluation. Baseline quantitative and qualitative metrics will be established through a survey of staff measuring their capabilities, productivity, comfort and ability with digital tools before the project starts, and then quarterly or bi-annually. Qualitative data would include measuring on a scale: communication between departments, ability to do one's job, perception of productivity, number and which digital tools are being used, comfort with tools, and more. Quantitative data might include how many meetings occur and their duration or the number of emails or other communications being sent across the organization, which can be strong indications of inter-departmental communication.

**External** – The Museum's transition to a more digitally literate, savvy and capable institution will be constantly monitored over the course of the two-year plan. Adopting a more iterative approach requires us to infuse more metrics to drive decision-making in our approach to leadership, supervision and project management. We will look to both direct and indirect measures of evaluation and success metrics, for example increases in visitation to both our website and our institution will identify direct success, whereas higher ranking on referral and search engine sites and more positive comments and interactions between staff and visitors will identify indirect success.

The project and leadership teams will track progress on a monthly basis, ensuring the timeline and budget requirements are being met and quality work is being produced in all areas. We will identify the metrics/Key Performance Indicators (KPIs) at the beginning of the transition that best reflect our progress, which will be a combination of direct productivity measurements and capstone metrics which reflect overall success. Because open and frequent communication is a key component to culture change, we will establish a location (likely a

dashboard) where staff can see our success metrics at any time rather than publish these at distinct moments. Adjustments will be made as needed to keep the project on track for successful completion.

**Sharing Results** - Inspired by the transparency modeled by other museums that have undertaken major digital projects (such as the Warhol Museum several years ago and currently the Williams College Museum of Art), Mingei intends to openly share insight into this project with colleague institutions, particularly those here in San Diego. Balboa Park in San Diego is home to 28 museums and cultural institutions that share resources, learning, best practices and more through collaborative organizations including the Balboa Park Cultural Partnership. There is already a collaborative infrastructure in place that would enable Mingei to report regularly to Balboa Park cultural partners, including: updates at director and affinity group meetings; presenting at the annual Smith Symposium in Balboa Park; and hosting workshops and/or forums via the Balboa Park Learning Institute. Mingei would also partner with BPOC to report and share project learning with the City of San Diego Commission for Arts & Culture and to submit session proposals to national and regional conferences.

## **PROJECT RESULTS**

At the conclusion of the Digital Transformation project, measurable results will include the following:

- Increased staff capacity for skills development and improvement (see Performance Goal)
- The majority of staff members have received formal or informal training for at least one new digital tool or process, developing comfort and increased knowledge with technology (see Performance Goal)
- Increased collaboration and efficiency in workflow/processes, transition from analog to digital
- The Museum's website and social media channels are part of an engagement pipeline that encourages audiences into successive, meaningful interactions
- There are standards and guidelines for data input and data sharing across the organization

The project will also result in the creation and implementation of quantitative (KPIs/metrics) and qualitative evaluation methods to monitor the work during the two-year project period and beyond. Measurements may include but are not limited to:

### *Workflow and Processes*

Number of manual administration and programmatic processes transferred to digital; Increase in logins, seats, licenses for software tools; Qualitative evaluations in perceived process and productivity improvements; Quantitative evaluations of greater productivity in collections documentation

### *Accessibility of Data (content, photos, videos)*

Increased number of collection objects available; Increased number of collection objects with images; Increased production of rich media

### *Audience Engagement*

Increased unique visits and visit duration; increased pageviews; increased repeat visits; decreased bounce rate; increased views and sharing of collection objects; Increased email subscription numbers; Increased open rate and click through; Increased followers and likes on social media; Higher ranking for appropriate keyword searching; Increased ranking on external referral sites

**Performance Goal & Measurements** - The IMLS Performance Goal identified for this project is to train and develop museum professionals. The Performance Measure statements are:

- My understanding has increased as a result of this program/training
- My interest in this subject has increased as a result of this program/training



- I am confident I can apply what I learned in this program/training

Corresponding data will be collected via anonymous survey provided to all participating staff via BPOC, with the option to answer each Measure statement on a scale from strongly agree to strongly disagree. The number of participants, number of total responses, number of responses per answer option and number of non-responses will also be tracked and shared.

**Change, Tangible Products & Sustainability** - The achievement of the results listed above will contribute to the continued evolution of an organizational culture that is adaptable and proactive, with a staff empowered to share content and embrace cross-departmental transparency. Ultimately, Mingei's staff will be able to optimize new learning and increased capacity to transform the Museum's approach to audience engagement in the lead up to the exciting unveiling of its transformed physical renovation in the summer of 2019.

Capacity and skills improvement will not be segregated to the project duration, but embedded within the culture of the Museum. Staff will become mindful of the needs of their colleagues, aware of where to find information and able to communicate more effectively. Results for individual staff may include an improved confidence and ability to do one's job, a higher perception of productivity, and increased job satisfaction.

Mingei will no longer house silos, analog processes and fractured data – implementing this digital transformation will influence the Museum's culture to embrace and expect change. This flexible mindset paired with the efficiency of technology will allow the Museum to be responsive to its audience and community. Ultimately, for the Museum audience, it will be easier, more entertaining, more educational and more rewarding to connect with Mingei International Museum across digital platforms.

Tangible products at the end of this project will include: a new, Museum-wide content sharing platform; an efficient internal process to deliver content to audience-facing digital platforms; a robust, functional, visitor-centered website and mobile site; a revitalized and relevant social media presence for Mingei, and a variety of opportunities for Mingei to share its process and learning related to this project with peer organizations.

This project aims to bring about systemic, organizational change. For individuals, the training, capacity building and integration of new tools and work processes are efforts that will last throughout their tenure at Mingei and beyond. The Museum will have built the capacity and processes to sustain this new way of working internally and engaging externally, founded in measurable outcomes and sustainable activities.

Change will be institutionalized as these outcomes and activities become a part of the Museum's Long Range Strategic Plan, embedded in its quarterly metrics and added to staff annual performance reviews. Eventually, this work will not be seen as new, or separate, or even "digital", just simply a part of the way the Museum functions. It's been said that the contemporary adoption of digital technology is equivalent to the shift to electricity over a century ago. That's where we intend to head as an organization – to simply turning on the lights every day in order to begin our work.

		Mingei International Museum																									
		Schedule of Completion																									
		YEAR ONE												YEAR TWO													
		2017			2018										2019												
	Key Activities	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep		
	Engage BPOC; Identify key staff and areas for initial training and process improvement;																										
	Establish measurement baselines and communication schedule, ongoing progress measurement & evaluation																										
	Purchase new EmbARK licenses and establish staff training plan and user group in Balboa Park																										
	Identify process change opportunities, particularly related to exhibition and collection content																										
	Select and implement a new digital content management system, and potentially a communication tool (ie: Slack)																										
	Train staff on new content management system and other tools (communication platform such as Slack, social media platforms,etc)																										
	Implement digital condition reporting application, develop consistent photography standards																										
	Implement process changes related to exhibition content pipeline																										
	Define pipeline and engagment plan to push content out to digital platforms																										
	Engage web developer (Raygun) to help evolve website to feature more dynamic, sharable content																										
	Museum closes for renovation																										
		YEAR ONE												YEAR TWO													
		2017			2018										2019												
	Key Activities	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep		

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