

Comprehensive Museums Strategy Report: Strengthening Edmonton's Museum Sector

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Executive Summary

This Comprehensive Museums Strategy Report is the result of extensive research and consultations with groups and individuals involved in the museum, heritage and cultural sector in the City of Edmonton and region. The goal of the report is to create an implementable strategy that will strengthen the city's many community museums in terms of professional standards, programming, market-readiness and sustainability.

The research and consultations revealed a number of key issues in Edmonton's museum sector:

- **Survival and stability** – many are small, day-to-day operations with few or no professional staff and uncertain financial futures;
- **Silos** – museums tend to connect only with museums of similar size, special interest or ethnicity;
- **Stratification** – there is a hierarchy of institutions in Edmonton according to size, stability and access to resources;
- **Communication** – lack of communication between the museums is a major issue in the city;

- **Image or visibility** – community museum leaders believe they suffer from a lack of visibility which extends to the whole heritage sector.

To meet these needs, a series of initiatives organized under the following three general headings is required:

- **Communications and Information**, under which initiatives such as enhanced marketing or advocacy are classified;
- **Interpretation, Programming and Research**, which would include initiatives such as a citywide interpretive plan to “slot in” the various museums in the big picture of Edmonton's heritage and reveal the gaps, among other initiatives;
- **And Training and Professional Development**, to assist the community museums to meet standards and improve market-readiness.

A detailed series of initiatives, organized by priority within each of these broad classifications, is found in Chapter 3.

To implement the strategy, we recommend that the Edmonton Heritage Council lead and oversee the development of an **“Edmonton Museums Network”**, which would ideally be linked together with a City-funded sustainability plan for the museums. This is the very successful model undertaken in Ottawa, where a network of 10 community museums has improved the museums’ public offerings and financial sustainability by a measurable degree. Details are provided in Chapter 3, along with an implementation schedule to guide the initial steps in implementing the strategy.

1. Introduction

1.1 Background to This Study

The City of Edmonton is one of Canada's fastest-growing big cities. As the capital of the Province of Alberta and one of the most diverse places in Western Canada, the city is home to numerous provincial institutions and agencies. It has a well-developed cultural infrastructure, with numerous museums, galleries, festivals and cultural institutions, and is becoming known for its arts and culture throughout Canada.

Given the growing importance of culture in Edmonton, the Edmonton Arts Council was commissioned by the City of Edmonton to develop a cultural master plan. Completed in 2008, *The Art of Living: A Plan for Securing the Future of Arts and Heritage in the City of Edmonton* lays out the state of culture in the city and makes several recommendations for leveraging and developing culture for the benefit of all citizens.

The Edmonton Heritage Council (EHC) emerged from that plan. A relatively new organization, the Heritage Council is charged with representing the heritage community in the city and increasing residents' awareness of their heritage endowment. No less importantly, the EHC is also intended to be a voice for heritage advocacy and for local heritage organizations. A public non-profit organization, the EHC has a significant funding relationship with the City of Edmonton.

In early 2012 the EHC in conjunction with the City of Edmonton asked Lord Cultural Resources to assist in achieving two of the immediate tasks given to the EHC in Recommendations #9 and #10 in *The Art of Living* document:

- A comprehensive museums strategy for the City's many museum institutions;
- And the development of a strategy for a new City of Edmonton museum.

The City's interest lies in ensuring its heritage resources are professional, sustainable operations and are capable of being leveraged for tourism, resident quality of life and other important purposes. While the emphasis in this study is to be placed on the proposed City Museum Strategy, these two main planning projects cannot be done in isolation. They are obviously interrelated and co-dependent, and this Comprehensive Museums Strategy builds on the work done for the City Museum project as well as the work completed specifically for the museums strategy. The outcome of this work will have a significant impact on the future effectiveness and sustainability of the many community museums in Edmonton.

1.2 Purpose and Organization of the Report

Our process looked at the context for Edmonton's community museums (the Alberta Museums Association reports that 27 are registered as members and 14 are AMA-accredited). Background research, on-site work in Edmonton, and a series of individual interviews comprised the work on which the Museum Sector Needs Summary Report was based, and which in turn is the basis for the strategy that is presented here. That process explored the status and needs of this museum sector, and identified the role of the City of Edmonton, the Edmonton Heritage Council and the proposed City Museum in shaping such a strategy to develop and sustain the museum sector.

This report is the result of that work plus additional consultation and an on-line survey conducted since that time. The report is organized as follows:

- This **Introduction**;
- **Chapter 2**, a summary of the **Consultation Process** and **Museum Sector Needs**;
- And finally our recommended **Strategic Directions, Key Initiatives and an Implementation Strategy** appears in **Chapter 3**.

Along with our companion volumes outlining a plan for a new City Museum, this final Comprehensive Museums Strategy report represents the close-out to this process, outlined in diagrammatic form below:



2. Consultation Process and Museum Sector Needs

This chapter provides a complete summary of the consultation process, beginning with the workshops conducted in Edmonton in early May 2012 and then proceeding to the individual interviews conducted for this process, leading to a summary of museum sector needs that informs the top-line priorities and the strategic initiatives in the next chapter.

2.1 On-Site Workshops

In early May, 2012, three half-day workshops were held with invited museums representatives, as follows:

WORKSHOP A	WORKSHOP B	WORKSHOP C
Chris Ashdown	Terry Allison	Catherine
Paul Collis	Herb Dixon	Mihajlovich
Kathryn Ivany	Joan Fitzpatrick	Monica Roberts
Rod MacLeod	Joanne White	Bill Tracy
Lorraine	Bert Yeudall	
Mychajlunow		
Constance Scarlett		

The workshops were followed by a series of targeted interviews with City Councillors, City staff, representatives of the Art Gallery of Alberta and the University of Alberta Museums, and individuals knowledgeable about the history and heritage of Edmonton and its museum sector.

A number of key questions informed the discussion:

- What are **existing partnerships** that could strengthen Edmonton's museum landscape and infrastructure?
- What **opportunities are there for collaboration** across Edmonton's existing museum organizations?
- What are **current gaps in existing museum support** (e.g. from City of Edmonton or Province of Alberta) that affect your museum's ability to function effectively and more fully engage the public?
- What **role might a city museum play** in Edmonton's museum sector?

Where the largest museums are functioning well in the current milieu and are in a position to consistently offer services and resources, smaller institutions are struggling. This chapter reviews the most pressing needs of the Edmonton museum sector based on our consultation process.

The matrix on the next four pages tabulates the issues, information and solutions brought forward in the workshops and interviews.

MUSEUM SECTOR NEEDS MATRIX

	Current Situation	What's needed	Partners	Sponsorship	PROS	CONS
Funding Stability	Funding tends to be year to year, very basic, must do extensive fundraising, competitive	Stable year to year funding that meets basic needs	Larger museums have good partnerships with Province and City - smaller museums need to speak with one voice	Province or City? EHC?	Knowing funding base for a few years ahead would allow programs to build on successes	Funding pool is not elastic - no "room" to add new players - unequal status of institutions
Rent and Taxes	Some museums are paying rent and/or property tax to governments	Ways to "forgive" these costs such as rebates	Need to speak with one voice to City	City	Better relationship with the municipal government	
Grant access - other program access	Grant writing is time consuming, costly, needs skills. Museums don't have matching cash.	More streamlined grant access, eliminate need for matching cash	Need to speak with one voice to City	City	More even-handed approach to funding heritage projects	Grant programs are still less viable than fully funded base budget programs
Internal Standards - Policies and Procedures	Each museum sets its own, but follow professional guidelines - reviewing and revising takes resources and skills	Could be more coordinated approach to setting policies and doing reviews periodically	AMA could assist	AMA	Museums reassured that their policies are effective	Concern re autonomy
Meeting External Standards - AMA Recognition Program	Not all Edmonton museums are "Recognized" museums due to time, cost, and requirements	Support for entry-level and grass-roots museums and organizations	AMA is reviewing its program - smaller museums need to have input	AMA	Reduce sense of have and have-not museums within the sector	Time commitment and learning curve for smaller museums to achieve recognition is still high

COMPREHENSIVE MUSEUMS STRATEGY REPORT: STRENGTHENING EDMONTON'S MUSEUM SECTOR

	Current Situation	What's needed	Partners	Sponsorship	PROS	CONS
Meeting External Standards - Industry, firearm safety standards etc	Learning curve for museums	Share expertise	Museum network could help form smaller interest/information networks	N/A	Assist other museums to deal correctly with specialized standards requirements	Still a commitment each individual museum has to meet
Help with Branding - coordinating branding	Some museums do little or no directed branding	Overall branding strategy in which each museum can find a place	Museum network could help with overall strategy	AMA or City, EHC lead	Enhance the unique image and "brand" of each museum by differentiating from all others	Concern re loss of autonomy
Administration and management costs	Museums all have similar needs and issues	Identify where some activities and cost could be centralized or shared	All museums should take part in overall study	EHC lead on studying needs	Reduce costs through critical mass	Concern re loss of autonomy, adding bureaucracy
Admission charges vs. donation - standardize strategy	Each museum decides own strategy and charges	Overall admission strategy in which each museum could fit	Museum network could help with overall strategy	EHC lead on studying needs	Reduce confusion for the visitor, even the playing field	Concern re loss of autonomy
Building operations and maintenance	Museums all have similar needs and issues	Identify where some activities and cost could be centralized or shared	All museums should take part in overall study	EHC lead on studying needs	Encourage dealing with maintenance in a timely way	Ensuring immediate response to maintenance needs
Meetings and Conferences - costs	Attendance limited by costs, time away from work	Local meetings where possible, grant help for further away	AMA, local networks	Federal and Provincial grants through AMA, local meetings sponsored by City/EHC	More interaction with colleagues, better information flow	Taking time away from work for meetings

COMPREHENSIVE MUSEUMS STRATEGY REPORT: STRENGTHENING EDMONTON'S MUSEUM SECTOR

	Current Situation	What's needed	Partners	Sponsorship	PROS	CONS
Staffing - professional	Smaller museum lack professional staff - mid-size may lack certain expertise	Identify where professional staff input is needed - could be shared contracts	All museums should take part in overall study	EHC lead on studying needs	Improve ability to deal with complex issues and activities	May require additional funding
Staffing - ticketing, staying open	Basic staff/volunteer level is to open doors, take tickets	Identify the basic level of costs for being open to the public	All museums should take part in overall study	EHC lead on studying needs	Increase awareness of what it costs to deliver heritage	May require additional funding
Staffing by Volunteers	Many museums rely on volunteers, the pool may be decreasing	Identify opportunities, gaps and challenges in attracting and keeping volunteers	All museums should take part in overall study	EHC lead on studying needs	Enhance ability to attract and keep volunteers	May require additional funding
Collections - Storage	Many museums max out on collection storage space	Identify where deaccessioning and inventory programs and shared storage opportunities could help	Provincial Archives - storage for smaller archives Museum and archives partners TBD for specialized storage or a regional repository	City or Province?	Thinking regionally could result in overall cost savings, better quality of facilities	Centralized storage means travel and moving artifacts around
Collections - Specialized	Specialized collections offer big challenges - space, expertise, conservation	Writing collection plans to identify which museums have which collection challenges and resources	Museums could partner in specialized storage for firearms, vehicles, etc or contracting a specialist conservator	City or Province?	Knowing more about specialized collections contents and needs could prevent duplicate collecting, help with preservation efforts	Concerns re autonomy, uniqueness of collections
Collections Documentation - digitizing, databases, digital storage, on-line access, tech support	Unequal resources and results - cost of keeping up documentation	Shared strategies? Can established museums show leadership?	Museums could share tech support contracts, digital storage etc	City - EHC could lead	Could be cost savings on licensing, upgrades, tech support etc	Museums may be committed to their own systems

COMPREHENSIVE MUSEUMS STRATEGY REPORT: STRENGTHENING EDMONTON'S MUSEUM SECTOR

	Current Situation	What's needed	Partners	Sponsorship	PROS	CONS
Website development and maintenance	Uneven quality - cost and expertise to build and maintain websites	Shared strategies? Some museums have done extremely well, could share how-to's.	Museums could share info and contracts on consultant, tech support, quality control, internal inputs etc	City - EHC could lead	Could be cost savings and overall improvement in quality and ease of website upkeep	Want to maintain uniqueness of own website
Communications - marketing	Museums do own marketing, costly and unequal quality, competitive	Share costs and market each other	Museums could have joint marketing strategies, City could provide budget for joint products	City-EHC or local museum network lead	Joint marketing products could be more widely circulated, provide higher levels of quality	Museums would probably need their own unique products in addition to joint products
Communications Between Museums - Information and Problem Solving	Communications tend to be informal - people talk to people they already know	info sharing or info clearing house - esp. re programming and events - newsletter, website	AMA communications tend to be about grants, conferences, training	City-EHC or local museum network lead	Ability to inform visitors of other attractions Ability to call others for help	Another time commitment for upkeep
Building Awareness and Visibility	Small museums feel "invisible" to communities and governments Large museums lobby effectively on their own	Raise awareness, image, speak with collective voice to the Province and the Municipality	A possible role for the EHC.	Cannot be government-led but could be spearheaded by the larger museums	More awareness of the entire heritage community and the job they are doing, the resources they put in themselves	Another time commitment, lack of resources and skills
Coordinated Yearly Calendar for Programs and Events	Museums set up their programs in isolation, repeat old programs	Need to share ideas before yearly programs are set, have central calendar somewhere	Ideally all museums would use it in some way	EHC could act as central calendar holder	Avoid duplication and overlap, or provide alternatives when popular programs are often fully booked	Museums want to be free to set their own yearly programs and timing

COMPREHENSIVE MUSEUMS STRATEGY REPORT: STRENGTHENING EDMONTON'S MUSEUM SECTOR

	Current Situation	What's needed	Partners	Sponsorship	PROS	CONS
Shared or joint programming - school tours, interest groups, Edmonton History Week	Generally museums run and fund their own programs - much duplication of effort	A Partner does admin and logistics, museums supply the content, host at their site	The Leg - Schools Program City Hall Schools Program Edmonton History Society Loyal Edmonton Regiment Museum /Archives Program	The Legislature City Hall Edmonton Historical Society Inquiring Minds - RAM?	Has been successful with different initiatives - central program administration takes burden off small museums	Costs include insurance, security for kids programs, having staff and volunteers available
Coordinated interpretation - reduce overlap	Museums decide on own interpretative themes, in isolation, lack of awareness of similar exhibits	Independent review of what each museum's stories are and where they fit in an overall framework, identify gaps and opportunities	Museums may choose to adapt their interpretation to fit into overall framework	City - EHC lead	Avoid duplication and overlap, museums become more unique, stories can be strengthened and expanded	Goes against valued sense of independence and autonomy
Sharing expertise - specialized collections and knowledge	Curators, collectors, dealers develop specialized knowledge based on their own collections, but not widely shared	Share information about who has expertise in what area and can be called for advice	All museums and archives could participate plus collectors, hobbyists, dealers, etc	City-EHC or local museum network lead	Could be a simple list addition to an information clearing house	Would require regular upkeep and tracking to see if useful (track hits on the website?)
Sharing "content" - loan artifacts, share archival resources for interpretation, sometimes exchange materials	Museums and archives share informally now	Can be strengthened by knowing each other better	All museums and archives could participate plus collectors, hobbyists, dealers, etc	N/A	Gets collections and knowledge out of storage	Requires additional work, time commitment

COMPREHENSIVE MUSEUMS STRATEGY REPORT: STRENGTHENING EDMONTON'S MUSEUM SECTOR

	Current Situation	What's needed	Partners	Sponsorship	PROS	CONS
Networks - Strengthen existing and create new ones	The one-size-fits- all network doesn't seem to work - Existing includes regional, Francophone, Ukrainian, educators, specialized groups	The right "fit" needs to be found for Edmonton - an "Edmonton Museums Network" as an umbrella?	All museums and archives could participate plus collectors, hobbyists, dealers, etc	City-EHC or local museum network lead	Regular gatherings of "everyone in the same room" promote collegiality	Another time commitment

2.2 Individual Interviews

Our interview process considered museum needs and potential strategies for meeting such needs. The main themes that emerged from the consultations include the following. Many of the workshop results were echoed in the individual interviews; overall results were reasonably consistent.

Need for a unified voice: The museums tend to work and speak in isolation. This is not unusual, but interviewees believed that the sector's needs could be better heard or understood if the museums spoke with a more unified voice.

Need to recognize that they are part of a larger story: The museums tend to be immersed in their particular subject matters and need to be more cognizant of where their stories "fit" in telling the larger Edmonton story (and in some cases, the larger regional story).

Needs to be a central organization to provide the "glue" to hold the museum sector together: Some interviewees noted that the museums emerged out of individual or group passions for particular subject matter and that they naturally have evolved according to their own interests. But, in order to advance the sector, some organization that provides coordination, encourages cooperation and in some sense provides representation is required.

Better inter-museum communication and openness:

Because the museums tend to operate as individuals within a certain jurisdiction, there is some understandable guardedness about sharing information and communicating well with other museums in the city. Interviewees felt that issues of territoriality needed to be overcome.

Need for greater degree of professionalization: Levels of professionalization are uneven across the various museums – surely a situation that must be expected given that there are so many of varying size, scope and capacity. Nevertheless, lack of professionalization does have a negative impact, both for the museums themselves and of course for the visitor experience, particularly in terms of access to funding and ability to generate attendance and revenue. Solid performance measures are not typically in place.

2.3 Summary of Consultations

The consultations revealed that there is a wealth of opportunity for Edmonton's heritage players, whether museums, societies, collectors, or government agencies, to become partners, advocates and sponsors for an enriched heritage sector. There is also willingness and an eagerness to break down the silos and forge more cooperative and coordinated relationships and strategies for survival and success.

Results from the consultation with Edmonton and surrounding region museums brought to light a number of high level issues that beset nearly all of the museums regardless of size and longevity.

The top issues that emerged in the consultation are:

- Survival and Stability
- Silos
- Stratification
- Communication
- Image or Visibility

Survival and Stability

The issue most strongly identified by Edmonton's museums, was survival, closely followed by stability. The prime factor affecting survival and stability was lack of funding, especially stable year-to-year funding as opposed to grant funding from government which is susceptible to political whim, or from one-time-only sources which tend to fund only special projects. Some of the consequences of funding instability can be:

- Inability to fund full-time staff positions
- Insecurity of long-term facility tenure
- Inability to plan ahead for programs or build on programs
- Being unable to meet external standards of professionalism
- Programs being skewed to meet the demands of funders
- Time and energy diverted to grant applications and documentation of results.

Museum representatives expressed that being in survival mode resulted in museum boards, staff and volunteers narrowing their focus to their own site and institution and to keeping basic functions going. Looking at the big picture, interacting with other museums or colleagues, or expanding ideas could be rejected as a "luxury".

Silos

The survival mentality plus the tendency to look inward tends to “silozation”, so that museums connect only with museums of similar size, special interest or ethnicity. Edmonton appears to have a number of museum “silos” outside of which museums do not necessarily know their peers, and are cut off from potential sources of help and inspiration.

Some of the silos are represented by museums with similar interests or origins, which may form formal or informal networks. Networks can help break down silozation to the extent that they reach out and draw in new members – are inclusive rather than exclusive. New initiatives to do with shared programs, are also helping to break down silos and enable museums to forge new networks and alliances.

It was expressed that while museums tend to cooperate well within their “silos”, there is a need for more broad-based and action-oriented networking, for example, to advocate on behalf of all Edmonton’s museums.

Stratification

A prime factor of the museums sector in Edmonton is real or perceived stratification or separation according to size, stability and access to resources.

The very largest museums, including RAM, AGA, Fort Edmonton, and the University of Alberta Museums, have the most stability and greater access to resources whether from government or from private fundraising. Their size allows them to undertake lobbying and advocacy on their own behalf, and their professional staff enables them to undertake all or most museum functions in-house. Their stability and longevity also allow them to talk to other national and provincial museums, government agencies, and professional organizations at the same level.

The mid-level museums also have achieved a high degree of stability and professionalism, with permanent staff, good access to resources, and ability to speak for themselves to government and other bodies. They speak to each other and form informal networks; for example, the Ukrainian museums form their own informal network.

Small and very small museums range widely in their levels of funding stability, of location in a permanent home, access to resources, and ability to advocate. Those longest in existence have survived the learning curve and may be able to function to a good professional standard, even to have some full-time professional staffing. However, many members of this group are struggling and all experience periodic crises of survival.

Communications

A lack of vehicles for regular communications between Edmonton’s museums was pointed out. Even getting to know new museum colleagues was seen as a challenge since different participants silo off to different meetings.

Museums lack the time to look at every other museum's website or newsletter on a regular basis, leading to lack of knowledge of each other's program offerings and possible duplication or time conflicts. Suggestions such as a shared calendar, newsletter or web page, chat room or clearing house for information, were made. The types of information to be shared were wide-ranging, from collections, to specializations, professional staff skills, to upcoming programs and events. Closely linked with sharing of information was the notion of coordination, so that museums would be aware of other museums proposed yearly programming and be able to develop complementary activities.

A key aspect of communications expressed by participants is the need for formal as well as informal networking. The regional networks model that emerged via grants available some 20 years ago has not caught on in Edmonton, though a number of tries have been made; it appears that Edmonton needs a tailor-made network model to meet the needs of many and diverse members. A network that is an umbrella to smaller networks may be considered as an option that could be supported by EHC.

Visibility

The workshop results indicated that many of Edmonton's community museum leaders believe they suffer from a lack of visibility which extends to the whole heritage sector. Whatever the reasons for this perception, being "invisible" to audiences and to governments means the heritage institutions are ignored or disregarded in setting policy and budgets.

Kudos were expressed to the Edmonton and District Historical Society, Historic Festival and Doors Open Edmonton for successfully starting and sustaining Edmonton History Week which many museums and organizations take part in annually.

Branding is another aspect of visibility that is being recognized as essential to even the smallest museums – but many lack the skills and resources to do it successfully.

3. Strategic Direction, Key Initiatives and Implementation Strategy

This chapter presents a strategy for Edmonton's museums to be led by the Edmonton Heritage Council. The chapter is divided in three main areas:

- Strategic Direction
- Key Initiatives
- Implementation Strategy

3.1 Strategic Direction

Strategically speaking, virtually all agree that the EHC should be a **support and service organization** with respect to the other museums in Edmonton: a champion, a source of expertise and advice, and facilitator for information flow, marketing and publicity both internally and externally.

The major needs as identified in the Phase 2 report (reviewed here) reinforce this broad view:

- **Coordinated Communication and Information Sharing:** This is perhaps the fundamental need. Lack of communication amongst the various museums has been documented as a key issue above. The need is for leadership in this role – a central vehicle to encourage and provide a platform for communication. Each of Edmonton's museums, archives and heritage organizations can potentially be a partner in networks, information clearing houses, shared programs, and integrated or coordinated branding and marketing strategies, but a central coordinating structure is needed.
- **Training:** This is a function of the issues around survival and sustainability as well as stratification. Many of the museums in the lower levels of the strata are unable to pay for professional staff, leading to a great imbalance in skills and human resource capacity. Training of volunteers and paid staff is very much a need of the smaller museums in the network. Training support should come through the Alberta Museums Association, while the EHC helps to coordinate and facilitate between Edmonton museums as required.

- **Coordinated Interpretation:** Each of the small specialized museums in Edmonton tells a small piece of the larger Edmonton story. But, largely due to the siloed nature of many of the museums and the lack of professional staff, many of the museums do not tell their stories with reference to the larger story. An overall city-wide interpretive plan into which each of the museums could fit would encourage better interpretation as well as serve visitors better. Gaps in the Edmonton story would be identified and each museum's place in that story would become clearer, resulting in a better understanding of the city's history and heritage. Understanding the gaps would also highlight where the Heritage Council might need to focus its efforts, perhaps using the proposed City Museum as the main method of doing so.
- **A Central Support Structure:** All of the above might be included within some type of central support structure that would coordinate and assist where possible in terms of the communication, training, staffing and interpretive issues outlined above. There is room for an Edmonton network to complement the four existing regional networks that emerged in the province two decades ago. The main function could be information sharing and communication but it also could engage in advocacy with the City of Edmonton, allowing the museum community to approach the city with one voice.

The priority for the Edmonton Heritage Council is clearly to function as a coordinator, a facilitator and a clearing house – of information, of partnerships and initiatives, and of professional development and training. Clearly the EHC must take a leading role, although it is important that some initiatives be coordinated with, or delivered by, professional organizations such as the AMA and other local heritage institutions as well as the museums themselves, in order that all take ownership in the strategy. More on implementation (who does what) is provided in section 3.3, including ways and means of encouraging leadership at the community museums to participate – a key factor in the success of any collaborative effort. In any case it must be recognized that the interest and capacity of at least some of the community museums in the city to participate is uncertain, and it may be wise to build slowly, beginning with a committed core of participants, and expand from there.

3.2 Strategic Initiatives

The key initiatives that might be implemented as part of the strategy include the following, in priority order by broad service area. It should be stated that there should not necessarily be an expectation that the EHC will by itself implement all the initiatives listed here; as noted elsewhere in this report, implementing even a selection of the highest-priority initiatives is very likely to require additional staff resources (at least one full-time equivalent position). Moreover, buy-in and participation from the community museums themselves via some type of “Edmonton museum network” structure should also be considered. Issues of implementation and “who does what” are considered in section 3.3.

Communications and Information

Priority One: Enhanced Promotion and Marketing: The EHC and its partner organizations could, in collaboration with Edmonton Tourism, develop a unified “brand” for Edmonton’s community and specialized museums as well as a set of key marketing messages. Within such a marketing plan strategies such as city museum or heritage passes as well as tickets or passes to some of the programs of the individual museums or the joint programs as suggested below could be implemented. The goal is to promote all the museums as a critical mass of attractions in the city – a “city museum” writ large, with many sites on different aspects of the city’s history.

Enhanced promotion and marketing would be facilitated by initiatives such as a **single calendar of events** similar to that found on the AMA’s public website for recognized museums, with information regarding the museum partners. A central source of information about temporary exhibitions, programming, festivals and events, important individual museum initiatives and other day-to-day events in the lives of the museums would go far to keep each of the currently isolated museums in better touch with happenings in other city organizations. This Calendar of Events would be available to the public and to the museums themselves.

Of course, this idea could also be applied to the many heritage events in Edmonton that are not necessarily museum-based. Important comprehensive events which could be included in the Calendar are Doors Open and the Historic Festival, both operated by the Historical Society.

Priority Two: Awareness and Visibility: As noted above, there appear to be significant gaps within the museum sector in Edmonton (and possibly regionally and provincially) between larger and smaller museums, in their ability to access resources, ability to be heard by government, and consequently, in their stability and viability.

There is room for the EHC and its partner organizations to facilitate one voice for the Edmonton museums. There are regional networks within the province as noted, but these do not include the large cities of Edmonton and Calgary. The EHC could lead an Edmonton division and represent key issues and needs of the Edmonton museum sector to the City of Edmonton.

Priority Three: Liaison with the City of Edmonton: The EHC could function as the museums' main liaison with the City of Edmonton. As an independent body with a significant funding relationship with the City, the EHC may have enough institutional independence to serve as a "mediator" between the City government and the various museums and provide a communication pipeline to the City Council and City administration, and could link individual museums with the proper person or department at City Hall.

Priority Four: Edmonton Museum Sector Research and Development: For the Edmonton museums, the EHC through its coordination function could initiate statistical work and thus provide an important research function. The fruits of the research would not necessarily be made public, and would not be done for their own sake, but could be shared with the participating museums. The museums would benefit from this annual or biannual benchmarking exercise and it would assist them in setting realistic performance measure targets. But it is important that this process not be onerous to the museums, avoiding lengthy forms and other cumbersome or time-consuming processes.

Interpretation, Programming and Research

The goal of the content initiatives is for the EHC to facilitate better interpretation of the Edmonton story. These would include:

Priority One: Edmonton Heritage Interpretive Plan:

Understanding the Edmonton region as one unit is important in terms of advocacy and unity amongst the museum sector. Information-sharing and partnerships are one way to encourage this. Another is in developing a region-wide interpretive plan which encourages regional thinking.

A region-wide interpretive plan would give a sense of the much larger story of which all of the museums tell a part. It would encourage an understanding of each one's place in the larger whole.

The plan would proceed like any museum interpretive plan – it would identify the main themes and stories and storyline and a detailed thematic breakdown, but it would also evaluate each individual museum's role or place in telling that larger story and in so doing would highlight the gaps. Areas requiring priority attention – those aspects of the story that are not being told – would appear, as would a clearer idea of which pieces are missing and what needs to be prioritized. The plan will provide the content basis of a number of initiatives intended to better tell Edmonton's story.

It would have the additional benefit of further defining the interpretive role for a central City museum if that plan is to be implemented, and indeed the City Museum's interpretive planning could very well be made part of this larger process.

Priority Two: Facilitation of Centralized or Joint Programs:

Under the leadership of the EHC, the museums could develop centralized programming to help knit the sector together and encourage cross-collaboration within a network organization. A few examples of the types of programs that could be instituted include:

- **Central Tour and Program Booking:** Working with appropriate organizations (as might emerge through this process), EHC could help support the development of museum tours and programs for interested groups or individuals. EHC would work with Tourism Edmonton and the school districts in particular to match the needs of each of these market segments with the appropriate museums. This is more of a service to potential visitors but it does go hand-in-hand with the single calendar idea and it does have benefit for the museums in terms of funneling more visitors to them than might otherwise be the case.
- **Themed Museum Tours:** Associated with the central booking idea is the idea of themed museum tours that would be created and delivered in collaboration with staff or volunteers at the relevant museums. For example, an Edmonton sports tour or an Edmonton transportation tour could be developed. Perhaps the

itineraries would not necessarily be strictly confined to the museums only (the sports tour might include a visit to Commonwealth Stadium or the Rexall Place) but museums would be an integral part.

- **Collections Sharing and Loan Program:** Most museums cannot hope to display more than a small percentage of their collections. The EHC could facilitate a collections sharing program whereby objects from one museum could be displayed in another, either as part of an exhibition or as part of a small display featuring items from one or more of the other museums in the city (see below). The EHC could also facilitate loans of City of Edmonton collections currently in storage at the Artifact Centre to other museums.
- **“Treasures From Edmonton's Museums” Travelling Display:** The EHC could coordinate a traveling display of some objects from a number of the city's museums that could circulate – not only amongst the various museums themselves, but perhaps in other venues as well (depending on security, climate and other museological issues affecting appropriate displays of collections). The initiative would have the effect of facilitating sharing and cooperation amongst the city's museums but would also inform visitors and residents about the wealth of museums in the city and effectively function as a form of marketing.

- **“StoryTour” App:** “Storytour” is an app connected to a global positioning system that EHC or one of its partners (under EHC supervision) could develop and offer visitors to Edmonton so that when one approaches a specific site (and museums would be included) a story or testimonial about that site would appear on the device being used. Stories would be made available on a website and where new stories may be added and the system continuously built up.

Initiatives Relating to Training and Professional Development

The need to assist Edmonton’s museums to achieve professional levels in standards, staffing and training must be an important part of the strategy.

Priority One: Assistance in Achieving AMA “Recognized Museum” Status: Some community museums have found it difficult to meet the program’s criteria – or to manage the process of meeting the requirements in order to achieve AMA “recognized museum” status. The time and skills needed to complete the requirements is seen and felt as onerous by the smaller museums.

The EHC could offer an assistance program to help smaller museums achieve Recognized Museum status, which allows access to certain AMA programs, grants and services while providing a useful designation for the museums themselves. Achieving “Recognized Museum” status is a training strategy because it opens doors to related AMA programs, and is also an indirect funding program, since it serves to connect museums with the AMA’s capacity-making grant programs (i.e. grants are tied to achievement of greater professional capacity).

Priority Two: “On-the-Ground” Mentoring: The EHC could provide expert mentoring to museums for mounting of exhibitions, development and delivery of programs, staging of special events, and so on. Where EHC does not have the required expertise, it may function as a broker or liaison between the museums requiring mentoring or assistance and the expert mentor, keeping lists of those in the city who are willing to lend a hand.

Priority Three: Performance Metrics: We have mentioned performance measures earlier in this strategy with reference to EHC’s information-gathering function. Implementation of performance metrics will enable museums to monitor their achievements and will provide measurable results that might be used to justify funding. Where appropriate metrics exist thanks to the AMA, EHC could provide assistance in implementing and measuring progress and in this way assist with Priority One.

3.3 Key Partnerships and Implementation Strategy

The Heritage Council will need to lead the development and implementation of the strategy and be the main facilitator and coordinator. ***However the EHC cannot be asked to carry the entire load of implementation on its own. It will clearly require more resources to implement even some of these initiatives – in fact, even to ensure that the job of developing and delivering these initiatives is parceled out among the beneficiaries of the strategy.*** As discussed below, at least one new staff person will be required at EHC, and possibly more depending on the number of initiatives implemented and the extent to which implementation requires EHC involvement.

As a preliminary task in implementing this strategy, we recommend that the Heritage Council work with its partners such as the Alberta Museums Association, amongst others such as Edmonton Tourism, as well as the various museums themselves, to determine the appropriate division of responsibilities for each initiative.

As a companion to this preliminary recommendation, it is also important that EHC determine its staffing availability to lead implementation. We have noted that additional resources and at least one new staff person would be needed to take charge of the strategy under the direction of the Executive Director. This staff person would be responsible at minimum for setting up regular communications and a communication network, keeping in touch with the area museums and ensuring that EHC's museums strategy – and the programs and initiatives that flow from that strategy – remain relevant to the needs of the museums. The staff person would, in short, oversee coordination of the strategy, monitoring who does what and measuring progress. ***The main point is this: without additional resources, the ability of the EHC to implement even some of these initiatives will be greatly compromised.*** There are many Canadian examples of community museum advocacy bodies that are unable to make the desired impact because lack of resources limits their ability to implement initiatives and generate buy-in from museums.

EHC as Coordinator of an Edmonton Museum Network

In terms of implementation, what the initiatives point to is the EHC functioning as the coordinator of an organized museum network for Edmonton's community museums. The example of the City of Ottawa's community museum system is instructive here.

The Ottawa Museum Network (OMN) was founded in 2007 and is a result of the City of Ottawa's Museum Sustainability Plan. This plan was passed by City Council in 2005 as a way of providing better support to the many small community museums that tell the Greater Ottawa story.

The City's *Museum Sustainability Plan* is the basis for the strategy and the key. As the financial support plank of the strategy, it provides the incentive for the community museums to participate in the network. The Plan recommended an additional \$2.4 million in operating investment and a \$3.9 million capital investment plan in Ottawa's local museums over the four-year term of the plan. The City of Ottawa's investments do not prohibit these museums from receiving provincial Community Museum Operating Grant (CMOG) funding.

The impact of the Sustainability Plan has been tangible:

- New staff were hired to provide curatorial, conservation, education, programming and facility management support.
- A major increase in the numbers of temporary exhibitions and programs offered by the various museums.
- Conservation work on museum collections was funded.
- Creation of "Ottawagraphy" virtual accessibility program (www.ottawagraphy.ca)

- And, perhaps due to the improvements in program quality, new staff and better grant-writing, non-city revenues (earned and provincial and federal funding) for the museum sector increased by 18% from 2007 to 2008 and 8% from 2008 to 2009.

The *Ottawa Museum Network* (OMN) is an outgrowth of this plan and the second plank in the sustainability strategy - the advocacy, marketing and training component of the plan. Its main purposes are to promote and advance the interests of the ten member museums, raise awareness of the museums in Ottawa and engage residents and tourists in local heritage by telling the greater Ottawa story. Collaboration and mutual assistance are key values, among others.

It is very important to note is that the OMN is governed by a Board that includes representatives of each of the ten member museums. It has an Executive Director that is a staff member of the Network and not any of the museums and paid for out of the City's Sustainability Plan funds.¹

Participation of the museum directors on the Board is a requirement for them to access Museum Sustainability Plan funding – it is this that makes the system work and generates participation and buy-in.

¹ For more information, see the OMN 2011 Annual Report at <http://ottawamuseumnetwork.com/uploads/documents/OMN%202011%20Annual%20Report.pdf>

Clearly a body that functions (or provides services) like the Ottawa Museum Network is needed in Edmonton; this network serves very much the same needs as have been identified as being relevant in Edmonton via this study. But in Edmonton's case there already exists a Heritage Council (such a body is lacking in Ottawa). And so the question is fundamentally institutional: is the Heritage Council the best candidate to organize a museum network, or should there be a completely new body? Can the museum network function be made a part of an expanded EHC mandate; can it be absorbed in its current structure, or should a brand new organization be created to serve the needs?

It is unlikely that the establishment of a new organization (a separate, incorporated, not-for-profit "Edmonton Museum Network" as in Ottawa) would be advisable; the EHC is the obvious candidate to coordinate the **functions** provided by the Ottawa Museum Network. ***But there needs to be a mechanism to involve the museums' leaders – in Ottawa that mechanism is the Museum Network's Board and it is the key to the effective functioning of the Network – and the mechanism to get the museum Directors involved is the funding from the Museum Sustainability Plan which is tied to participation.*** As noted, additional support for the EHC is likely to be required if this strategy is to be at all effective.

Since a new organization with a Board seems unnecessary given the existence of the EHC, perhaps the vehicle utilized to involve various museum leaders could be something like an advisory council or standing committee (as opposed to a Board, which is the case in Ottawa). This group would be the main tool for the implementation of the strategy – since

strategies, initiatives and tasks and assignments for implementation could be discussed and agreed by the various representatives as appropriate, ensuring that the EHC is not left with the load of implementation (and ensuring buy-in from the museums).

To further clarify roles and responsibilities, it might be useful to consider the mission and mandate of EHC:

...to provide a forum for analyzing, discussing and sharing heritage issues in Edmonton, advocate for a vibrant heritage community and heritage programs that benefit all Edmontonians, unify Edmonton's heritage community and give it a voice, promote the awareness and development of effective, informed and recognized heritage principles and practices.

Initiatives obviously need to be undertaken within this mandate, but clearly the mandate gives the Heritage Council scope to serve the Edmonton museum sector in terms of the needs outlined, and provide the kinds of service that the Ottawa Museum Network provides (although the EHC mandate is admittedly broader). The key words are "forum", "advocate", "unify" and "promote" ("promote" in this case may mean "promotion of professionalism" as well as "promotion of heritage and museum interests" and "marketing"). In any case the mandate is currently wide enough to permit the EHC to function as the coordinator of a museum network and some sort of related body to involve the museums' leaders, which is crucial to success.

Other Key Implementation Partners

While Edmonton's museums would certainly benefit if the EHC can serve as a central support structure, it would be useful to explore the potential roles of other overarching heritage organizations in Edmonton that play roles similar to that of EHC: the Alberta Museums Association and the Edmonton Historical Society, as a community partner, as well as Edmonton Tourism:

- **Alberta Museums Association Vision Statement:** *"The Alberta Museums Association is a leader and catalyst for dynamic connections among museums and communities."*
- **Edmonton Historical Society Mission Statement:** *"To promote and preserve the history of Edmonton and the surrounding district."*

While the AMA should also play a role as the EHC's partner in the effort to serve Edmonton's museums, its mandate is obviously province-wide and the EHC's activities in coordinating, facilitating and informing could actually be seen as assistance to the AMA in achieving its vision.

With regard to the Edmonton Historical Society, they can be a community partner in the effort to "promote" heritage and history along with the EHC and while historical societies are typically more interested in preservation of the subject matter and the content, in this case the **promotional aspect** of their mandate means that they be considered as part of any strategy to meet Edmonton museums' needs as identified via this process. The Historical Society may also be important in the **programmatic** and **educational** initiatives, advising on content and assisting with construction of themed tours, educational programs and the like. Both the AMA and the Historical Society might be represented on the advisory council.

Edmonton Tourism "creates, implements, and evaluates tourism marketing initiatives for Greater Edmonton, working in conjunction with both public and private tourism industry partners". The organization has several major initiatives, but the most relevant may be the operation of two visitor centres, one of which is downtown and the other of which is seasonally operated at the airport. The EHC's promotional efforts on behalf of the city's museums should be done in partnership with Edmonton Tourism, including publicizing the StoryTour app, the themed tours or any number of joint program initiatives as outlined in the previous section, as well as the marketing and promotion initiatives also as noted above.

There are certainly other partners that will be important to the implementation of this strategy – the Edmonton Arts Council, the Alberta Craft Council, and many others.

3.4 Implementation Plan – Key Steps

The table below provides key steps for the implementation of this plan going forward. The bulk of the implementation is expected to occur in 2013.

	2013			
	Q1	Q2	Q3	Q4
Comprehensive Museums Strategy				
Confirm initial resource requirements (staffing and program resources)				
Develop draft terms of reference				
Initial formation of Edmonton Museum Network involving key implementation partners/members/stakeholders				
Confirm strategic direction, key initiatives, implementation strategy (business plan, goals, objectives, roles, responsibilities, accountability)				
Implement steps for key initiatives according to confirmed strategy				

Appendix A: Acknowledgements

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- Marian Bruin, City of Edmonton
- Alexandra Hatcher, Executive Director/CEO, Alberta Museums Association
- Anne Hayward, Community member and consultant
- Kathryn Ivany, City of Edmonton Archivist
- Beverly Lemire, Professor, Department of History and Classics, University of Alberta (Committee Chair, EHC board member)
- Rhonda Norman, City of Edmonton (to February 2012)
- Terry O'Riordan, Provincial Archives of Alberta (Committee Vice-Chair, EHC board member)
- Virginia Stephen, Executive Director, Liberal Studies, University of Alberta (EHC Chair 2011-12, EHC board)

- Kyla Tichkowsky, Royal Alberta Museum

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- Chris Ashdown, President, Edmonton Radial Railway Society
- Frannie Blondheim, Associate Director, University of Alberta Museums
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- Adriana L. Davies, Ph.D., Consultant
- Rick Daviss, Executive Director, Arena District Project, Sustainable Development, City of Edmonton
- Herb Dixon, President and General Manager, Alberta Railway Museum
- Joan Fitzpatrick, Supervisor of Program Services, Legislative Assembly of Alberta

- Benita Hartwell, Curator, City of Edmonton Artifact Centre
- Anne Hayward, Norquest Museum Consulting
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- Heather Kerr, Curator, City of Edmonton Artifact Centre
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