Final Report

FUTURE OF MUSEUMS:
Literature Review

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Pictured on cover: Philip and Patricia Frost Museum of Science, Miami, FL

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INTRODUCTION

The past three years have presented challenges as well as opportunities to museums and cultural institutions. From the financial instability that was exacerbated and deepened by the COVID-19 pandemic to the renewed, urgent calls for racial justice and systemic transformation after the murder of George Floyd and other Black Americans, no aspect of the cultural institution field has been left unaffected or unexamined. In the past few years, leaders have been exploring strategies to stabilize their organizations and prepare for future crises, considering the wellbeing of their workforce and how to increase the diversity of their staff, experimenting with digital tools to make programs more accessible to visitors and streamline operations, and questioning what leadership models are called for in this moment. Consequentially, leaders across the field also are questioning the role of the museum and its responsibility—both to existing visitors and the broader community—in effecting meaningful social and political change. Perhaps most importantly, museums are being asked to listen to their communities and build authentic and trusting relationships that will allow them to respond to their communities' needs in a meaningful way (Leigh, 2022).

To consider these topics and others, the Institute of Museum and Library Services' (IMLS) Office of Museum Services (OMS) and Office of Research and Evaluation (ORE) will hold a convening for leaders in the field of museums and cultural institutions from across the United States on March 2–3, 2023. Through the convening, IMLS desires to build a collective, foundational understanding of the primary concerns of the field over the last three years. IMLS also aims to identify innovative, promising approaches for addressing these concerns that will inform their grantmaking, policy, and research agendas.

To support the convening, the American Institutes of Research (AIR) conducted a review of grey and peer-reviewed literature. The purpose of this literature review was to identify and document the questions and concerns of the last three years within the field, as well as ideas that are being explored for how to address them. The literature review serves as a starting point for discussions at the convening. Suggested discussion questions and topics are included in each section.

Guiding Questions

The following questions were jointly developed with IMLS and guided our identification and synthesis of the literature for this review:

- Since November 2019, what topics have been explored in the literature from the museum and cultural institution field that relate to the future of museums? Which topics have been discussed extensively? Which topics are less frequently or not at all discussed?

- For the topics that are currently being discussed, what are the persistent, unresolved questions in the field? If possible to identify, what kinds of institutions are participating in these discussions?

METHODS

This section provides an overview of our approach to identifying the current discussions in the museum and cultural institution field, selecting documents for inclusion that relate to the goals for the literature review and help us answer the guiding questions, and abstracting key information from each selected document. In the remainder of this document, "museums and cultural institutions" will be referred to as "museums" for efficiency.

Phase 1: Literature Survey

To ensure that we selected documents for inclusion in the literature based on a complete understanding of discussions in the field between November 2019 and September 2022, we conducted a broad survey of the topics covered in 19 key sources (Exhibit 1). We included documents from authors based in the United States who discuss topics related to the role and operation of museums and cultural institutions in this country. In some instances, authors used examples of international museums as illustrative of the topic they were discussing. These articles were included. To manage the scope of this literature survey, we excluded conference proceedings because of the level of effort involved in reviewing them. For each source, we documented all publicly available literature—limited in some cases by sites with article limits or members' only access—along with a brief description of the topics covered. In identifying documents to include in the landscape survey—and through consultation with IMLS—we conducted an initial scan of each document; we did not conduct an in-depth reading. By skimming the articles during the initial survey, we recognize that we were unable to capture the context and nuances of each document, but we were able to quickly review and code 981 documents, giving us a foundational sense of the landscape that would ultimately support a more in-depth analysis.

Exhibit 1. List of Resources

SOURCE	LINK
American Alliance of Museums	https://www.aam-us.org/
American Association for State and Local History	https://aaslh.org/
Association of Science and Technology Centers	https://www.astc.org/
Association of Zoos and Aquariums	https://www.aza.org/
Association of Children's Museums	https://childrensmuseums.org/
American Public Gardens Association	https://www.publicgardens.org/
Association of African American Museums	https://blackmuseums.org/
Association of Art Museum Directors	https://aamd.org/
American Institute for Conservation	https://www.culturalheritage.org/
Association of Tribal Archives, Libraries, and Museums	https://www.atalm.org/
Small Museum Association	https://www.smallmuseum.org/
Visitor Studies Association	https://www.visitorstudies.org/
SMU DataArts	https://culturaldata.org/
Culture Track	https://culturetrack.com/
Canopy Strategic Partners	https://canopysp.com/

SOURCE	LINK
artnet	https://www.artnet.com/
The Getty	https://www.getty.edu/about/whatwedo/getty_magazine/
Cuseum	https://cuseum.com/
Curator: The Museum Journal	https://curatorjournal.org/

Coding

Once we identified all potentially relevant documents, we used an inductive process to develop eight major codes with corresponding subcodes and code each document (Exhibit 2) (Bingham & Witkowsky, 2021; Creswell, 2012). We chose to develop the major codes according to key aspects of museum management and organizational structure to align with potential areas of interest among convening participants. After developing the list of codes and subcodes, we coded all relevant documents with at least one code, as appropriate. Once all relevant literature had been coded, we assessed the topics included in a given code and their relative frequency of discussion. In collaboration with IMLS, we identified select topics for an in-depth review of the literature.

Exhibit 2. List of Major Codes and Subcodes

MAJOR CODE	SUBCODES
Business models, finances, and sustainability	Business models* Budget management and cuts* Revenue streams* Investments*
Workforce	Compensation* Staffing* Labor practices*
Operations	Operational changes post-pandemic* Digital tools* Pricing/ticketing* Vendors* Resiliency* Facility design
Boards and leadership	Board membership* Leadership models* Organizational mission
Audience experience (combined into "role of the museum")	Communication and outreach* Audience trust in the organization* Exhibition spaces Exhibition strategies Programming Addressing social issues and concerns*

MAJOR CODE	SUBCODES
Community impact (combined into "role of the museum")	Social impact* Museums as community infrastructure (e.g., education for children, livable communities for elders, mental health, disaster response,* and environmental sustainability*) Community-centered programs Facilities as community space
Research*	No subcodes
Community engagement and partnerships*	No subcodes

Topics selected for in-depth review of the literature.

Phase 2: Literature Selection and Abstraction

After prioritizing selected topics for an in-depth review of the literature, 647 articles remained. Given the scope and timeline, we determined that reviewing an average of 30 articles per major code, or about 240 articles, would be feasible. To select the most relevant articles for each topic, each major code was assigned to one of four analysts. For each subcode, analysts reviewed the document title, publication information, and summary that had been documented during Phase 1, and rated each article as a 1, 2, or 3 according to predetermined criteria (Exhibit 3). Once rated, analysts selected all articles rated as "1" for abstraction and a selection of articles rated as "2" to reach the target number of articles for that subcode.

Exhibit 3. Prioritization Criteria

PRIORITY RATING	ARTICLE CHARACTERISTICS, BASED ON TITLE AND SUMMARY DESCRIPTION
1	• Includes high-level findings, guidance, or design principles • Represents an in-depth exploration of a particular topic or discussion • Represents a unique topic within the subcode or a new perspective • Represents a unique discipline within the topic
2	• Primarily focused on providing examples of how a museum has implemented an idea or principle • Unclear whether it includes guidance based on the museum's experience
3	• Primarily focused on pandemic-specific solutions to challenges • Primarily focused on disciplinary concerns (e.g., sustainability of archival gloves); not applicable across a spectrum of disciplines • Not focused on a vision for addressing a particular issue or concern within the museum field • Focused specifically on the details of programs or exhibits and their impacts

Once articles had been prioritized for abstraction, analysts reviewed each article in detail, updating the summary as appropriate, documenting the organization name and discipline for any documents that were focused on the experience of a specific organization, and capturing details to answer the following questions:

- What problem is this article addressing? What question is it trying to answer?
- What did the institution do to address the problem or answer the question?
- What did the institution learn or discover when trying to address the problem or answer the question?
- What guidance does the article share based on what the organization did or learned? What design principles or frameworks does the article recommend?

Analysts were not able to answer all questions for each document. Once all documents were abstracted for a given subcode, the analysts synthesized the information according to key problems or questions.

At the beginning of the abstraction process, all analysts abstracted the same four documents and discussed the abstractions for intercoder reliability (Creswell, 2012). During the prioritization and abstraction process, analysts met regularly to discuss questions and ensure consistency of approach.

SUMMARY OF FINDINGS

Topic 1: Financial Models and Sustainability

The COVID-19 pandemic caused significant financial stress to museums. With limited or no operations and financial resources thinned, museums were forced to adopt measures to generate revenue despite not being open for regular operations. This section explores discussions in the recent literature related to management or adaptations to financial models and the long-term sustainability of organizations in the museum field, including what we have learned about financial resiliency during a crisis, alternative revenue streams to supplement traditional revenue sources (e.g., membership and ticket sales, donations), and adjustments to long-term investment strategies.

Financial Resiliency in Times of Crisis

The literature reveals that most museums and organizations did not have a long-term financial resiliency plan or strategies in place to support their financial stability when met with a crisis (Voss & Robinson, 2020). Literature published during the pandemic and its aftermath focuses on examples of how museums employed unique adaptation strategies for stabilizing their funding, such as partnerships, involvement of staff in scenario and strategy planning, and museum leadership staff taking salary reductions of 60–75 percent of their base salaries (Brown, 2020; Philbrick & Vassallo, 2021; Witter & Wilson, 2022).

Innovative partnerships. To mitigate declining revenues during the pandemic, four midsized nonprofits in the visual arts field formed a joint initiative for group fundraising (Philbrick & Vassallo, 2021). Through their partnership, they focused on group fundraising to reduce revenue loss, and then designed and implemented virtual exhibitions together. They also built structures to equitably disburse funds raised among themselves in relation to budget size. They found that breaking down historical silos between the organizations and combining their audiences led to successful virtual events. Furthermore, sharing resources and ideas allowed them to lower their financial expenditures.

As another example, a children's museum that faced bankruptcy during the pandemic regained financial stability with a new business model that included partnering with schools to create two-week immersive learning programs for their students (Witter & Wilson, 2022). The museum collaborated with school district curriculum specialists to raise funds and secure grants for the new program, which continued after students returned to in-person learning. The sustainability component of this model shifts some of the programmatic cost burden to the school district, which supports curriculum development, pays a fee to the museum for each participating student, compensates teachers for extra working hours, provides transportation and lunches for students, and pays museum administrative staff to be on-site during the programs.

A blog post published early in the pandemic on the American Alliance of Museums' Center for the Future of Museums Blog detailed lessons learned from the 2003 SARS pandemic. This post presents the example of a Canadian science museum which, during SARS, collaborated with its board members who worked across the creative, hospitality, and cultural industries to ensure the museum's financial sustainability (Martin et al., 2020). Collaborating across multiple industries allowed the alliance to create mutually beneficial programs— for example, offering a package deal for discounted restaurants and tickets to cultural institutions. This approach had the dual benefit of helping the museum recover while also strengthening the resiliency of the local community (Martin et al., 2020).

Importance of community orientation. A study conducted in August 2020 examined successful strategies employed by financially high-performing community-based arts organizations during the pandemic (Voss

& Voss, 2021). The study focused on smaller community-based organizations in the performing arts and general arts and culture (e.g., folk arts) sectors that primarily serve communities of color (Voss & Voss, 2021). The study found that organizations that primarily serve communities of color have inequitable access to funding from both corporations and foundations when compared with their peer organizations (Voss & Voss, 2021). The inequitable access to funds inhibits their revenue growth, further perpetuating shortages in organizational capacities that manifest in low wages, workforce burnout, and inadequate staffing (Voss & Voss, 2021). The leaders of these organizations participating in the study indicated that one reason their organizations were able to maintain strong financial health during the early days of the pandemic was because they were community-oriented—that is, they implemented programs to meet the needs of, and create value for, their community (Voss & Voss, 2021). Building community value through the combination of community orientation and high-quality programs attracted artists, audience donations, funders, and volunteers, which ultimately supported the organizations' financial health (Voss & Voss, 2021). More broadly, the study also points to a need for guidance on how to mitigate or address systemic barriers to equitable funding.

Strategic budget planning. Another article provides guidance for museums to ensure that they are strategic and thoughtful about their budget planning (Zickuhr, 2022). The author emphasizes that an organization's budget and strategic planning should align to ensure that the organization's financial decisions are targeted and efficient (Zickuhr, 2022). Recommendations include the following:

- Hold budget discussions that focus explicitly on the museum's priorities first, then fill in numbers.
- In isolation, budget allocations should communicate the museum's priorities.
- Combine budget check-ins with check-ins on the museum's strategic priorities.
- Budget from the ground up (i.e., zero-based budgeting).
- Ensure that senior staff, who are aware of all strategic priorities across the organization, are a part of budget planning.
- Keep fundraising efforts focused on the museum's strategic priorities.

Consider what initiatives or plans need to be cut because they do not align with the museum's strategic priorities (Zickuhr, 2022).

Guidance for developing a growth plan. The literature also includes guidance for museums to grow their revenue and value proposition during a financial crisis (Voss & Robinson, 2020). A report that assessed the pandemic's effect on nonprofits in the arts and cultural sector recommended a series of questions for arts and cultural organizations to explore when planning reopening and sustainability scenarios in a post-pandemic space. These questions include the following:

- What might the next year look like for the organization?
- What is the source of the organization's strength?
- How will the organization manage its people and revenue propositions to confront the new reality?
- When the organization's doors reopen, what kinds of visitors will it gather?

The literature emphasized the importance of an organization taking the time to reflect on and consider all possible options and scenarios available to the organization. For example, in managing its staff, relative to revenue generation and growth, organizations should consider scenarios with all the people within their organization: board members, artists, staff, and others (Voss & Robinson, 2020). Similarly, to manage its revenue proposition, an organization should consider innovative ways to generate income needed for growth (Voss & Robinson, 2020).

Alternative Revenue Streams

The literature highlights alternative revenue streams—including nontraditional and innovative approaches—for museums to encourage them to diversify their income and support financial stability.

Shifting to monthly memberships. One article cited several examples of organizations that had shifted to a monthly membership model from an annual model, which replicates popular e-commerce-based subscription business models. The article found that this model consistently contributes to increased revenues and makes membership accessible to those who are more able to afford paying membership fees on a monthly basis (Siemer & Lewis, 2021). In addition, retention rates for monthly donors were high, and the monthly membership model attracted donors who had a higher lifetime value for the institution (Siemer & Lewis, 2021). Ultimately, monthly memberships provided museums with a "predictable, consistent, and recession-resistant cash flow" (Siemer & Lewis, 2021).

Renting museum space. As employers allow remote and flexible work arrangements, fewer workers are commuting to neighborhoods where museums are located, and some staff may be reconsidering their residential options (Merritt, 2021b). One report notes an increase of 112 percent in digital nomads—people who work fully remotely and are location-independent (Merritt, 2021b). The shift in demography highlights the need to engage new audiences (e.g., remote workers) (Merritt, 2021b). For example, museums have an opportunity to create coworking or other remote workspaces, as well as to rent their spaces for professional retreats, employee meetings, or other in-person corporate events (Merritt, 2021b). As an alternative source of revenue, one zoo reported that it could take in a week's worth of revenue by allowing a corporation to rent the space for an event (Lawler, 2022).

Investing in volunteers. Research from Fidelity Charitable found that almost half of donors are likely to volunteer before making a gift. Similarly, two-thirds of donors make contributions to organizations where they volunteer (Kosarin, 2022). One air and space museum reported that it received contributions totaling $225,000 from volunteers (Kosarin, 2022). This museum invests in its volunteers by creating an environment of belonging and appreciation. For example, volunteers are encouraged to contribute feedback in the same way as staff would, including being invited to staff meetings and to join committees or the advisory team. In addition, the museum invested in a full-time volunteer manager who oversees the volunteer program and builds critical relationships with volunteers (Kosarin, 2022).

Virtual events. During the early months of the pandemic, when most museums and cultural institutions were closed, some museums experimented with requesting digital contributions, fees, or pay-what-you-can for live-streamed events, online classes (e.g., cooking, painting), virtual tours (e.g., robot-led pay-what-you-view tours), digital events, and online galas (Ciecko, 2020). Two zoos also offered cameo appearances from animals at video conferences for purchase (Ciecko, 2020). One zoo made it possible for viewers of a live-streamed event (where zoo staff fed giraffes) to donate money during the event itself (Ciecko, 2020).

Aligning Investment Strategies With Museum Values and Mission

Museums with endowments tend to invest them in index funds (e.g., S&P 500), which include companies that trade in products that may not align with museums' missions and values (e.g., weapons, fossil fuels, opioids) (Callanan, 2021a). As calls to prioritize diversity, equity, accessibility, and inclusion (DEAI) and address gaps in power and wealth have grown louder in recent years, the discourse on museum investments argues that museums should consider impact investing (i.e., investing for positive social or environmental change) or restorative investing (i.e., investing to dismantle inequitable power structures) to align with their mission and support systemic change—also known as "impact investing" (American Alliance of Museums [AAM], 2021; Callanan, 2021a, 2021b; Merritt, 2020c; Moellenbrock, 2020; Raginskaya, 2019a).

Different approaches to impact investing include socially responsible investing (i.e., screening out investments that do active harm), values-aligned investing (i.e., letting values guide investment choices), mission-related investing (i.e., investing to advance the mission), and investing in companies embedded within the creative economy (AAM, 2021; Callanan, 2021a; Merritt, 2020c; Raginskaya, 2019a) while still seeking solid financial returns. Some investment banks and the Forum for Sustainable and Responsible Investment have reported evidence of positive financial performance from both socially responsible investments and investments in companies with good environmental, social, and governance (ESG) ratings (Callanan, 2021a, 2021b; Merritt, 2020c; Raginskaya, 2019a, 2019b). In addition, younger generations are beginning to consider whether an institution aligns their capital with their mission before donating to an organization (Callanan, 2021a, 2021b; Merritt, 2020c; Moellenbrock, 2020).

Guidance on shifting to impact investing. To support museum leaders on sustainable impact investing, which is novel to the cultural industry, a nonprofit organization published a guide aptly titled "The Guide: What Cultural Institutions Need to Know About Investing for Values and Mission" (Callanan, 2021b; Moellenbrock, 2020). Several museums and foundations have taken intentional approaches to ethical and sustainable investing of their funds in recent years and chosen different strategies. Following are some examples:

- One art museum shifted a portion of its endowment to align with well-rated ESG investments (Callanan, 2021a).

- Another invested 10 percent of its endowment through companies and asset management firms owned by women and people of color in alignment with its commitment to diversity, equity, and inclusion (Callanan, 2021a; Raginskaya, 2019b).

- An arts foundation shifted 5 percent of its endowment to a more socially responsible strategy.

- A social justice foundation adopted an investment policy of only making impact investments (AAM, 2020b; Callanan, 2021a).

Change is slow. Despite assurances of the viability of socially responsible investing from investment banks, philanthropy advisors, and fund managers, there seems to be limited or slower shifts from traditional investing to impact investing (Raginskaya, 2019b). A study surveying 61 US art and design museums with a combined $10 billion in endowment assets about their investments identified that only a third of the respondents were currently investing their funds in a responsible way (Callanan, 2022; Dafoe, 2022; Moellenbrock, 2022). Survey participants cited the following barriers to socially responsible investing: the lack of availability of diverse, financially sound, and quality investing assets and products; the lack of ability to achieve strong or sustainable financial returns; and the lack of ability to measure how much an investment generates impact (Moellenbrock, 2022). However, the same report also pointed out that although these concerns are common, they have been addressed by the impact investing sector through the provision of evidence of the current availability of quality products across all asset classes, solid financial returns, and referrals to a list of asset management firms that focus on sustainable investing (Moellenbrock, 2022).

Limited internal knowledge is another potential barrier to socially responsible investing. For example, museums that do not have fund managers on their board or board members associated with the finance industry may be unsure about how to shift their investments (AAM, 2020b; Callanan, 2022; Moellenbrock, 2022; Raginskaya, 2019b). In a survey of leaders from a group of eight art museums, foundations, and an art university, almost half of the respondents stated that having expertise in impact investing among their board members or within their committees was important (Callanan, 2022; Moellenbrock, 2022). Furthermore, the museums that are most actively engaged in impact investing have investment committees that are actively involved in the conversation of restorative investing (Moellenbrock, 2022).

There also is a lack of awareness among the public on whether the museums they frequently visit or donate to are involved in socially responsible investing (Callanan, 2022; Moellenbrock, 2022). Increased awareness among the public about impact investing may put pressure on museums to shift their strategies to meet public demand for mission-aligned investments.

DISCUSSION QUESTIONS:
1. What does the field need to prepare for the next financial crisis? What does long-term financial sustainability look like? What can institutions do to plan and prepare now?

2. How can new approaches to earned revenue contribute to long-term financial sustainability? What data do institutions need to consider the viability of alternative revenue streams for them?

Topic 2: Workforce

The discourse in the museum field on maintaining a strong workforce focuses on issues related to supporting employee well-being, ensuring appropriate compensation, increasing diversity in the field, overcoming barriers to entry to the field, and creating a collaborative working environment.

Supporting Employee Well-Being

The literature describes the role that cultural institutions can play in supporting employee well-being. Examples of ways that museums can support employee well-being include the following:

Flexible and individualized workspaces, such as finding ways to minimize distraction, to support neurodivergent employees with unique sensory needs (Josey, 2021).

- An empathetic culture (Bryant-Greenwell & Bryant, 2022; Culture Track, 2021; Giordano, 2022; Whitaker, 2021), which leaders can foster by listening supportively, showing emotions and vulnerability, and giving permission to other employees to do the same (Canopy Strategic Partners, 2021; Merritt, 2021a; Musun-Miller, 2022).

- An emphasis on work-life balance, which includes encouraging staff to create a fulfilling life outside of work (Lynch & Stokoe, 2020; Merritt, 2021a); offering benefits, such as paid family leave, flexible work schedules, flexible holiday schedules, community-centered leave for staff to take time from work to support their communities (e.g., participate in an indigenous ceremony), or on-site maternal health support (e.g., a lactation room) (Canopy Strategic Partners, 2022b; Giordano, 2022; Parzen, 2021); and having an option for telework or a rolling coverage schedule to correspond with the requirements of a particular role (Hindle, 2022; Titman, 2021).

- Support of employees' mental health, both by encouraging staff to seek support when needed (Merritt, 2021a) and by offering an employee assistance program, in-house counseling, or a partnership with a local mental health facility (Canopy Strategic Partners, 2021; Fitzgerald, 2022).

Ensuring Fair Compensation

Across disciplines, one of the literature's most frequently mentioned barriers to employment in the field of museums is compensation below a living wage. The literature calls for organizations to rethink their compensation policy, arguing that cultural institutions must develop fair and equitable compensation programs that accurately reflect the external labor market to attract new hires as well as retain and motivate existing staff (Imholte, 2022; McNamee, 2022). Several organizations across disciplines have increased the pay of their frontline staff to meet a living wage standard (Buckley, 2022; Giordano, 2022; Khalil, 2022; Oakland Museum of California, 2022; Parzen, 2021). In addition, one anthropology museum has placed a cap on what the highest-paid employee makes in comparison to the lowest-paid employee (Parzen, 2021).

Hiring Diverse Staff

The literature also argues that organizations must be intentional in their mission to increase DEAI within their institutions (MuMin, 2020; Silver, 2021; Williams, 2019). This includes considering recruitment practices that support hiring diverse staff, including volunteers (Kosarin, 2021a). Several articles describe how institutions across disciplines can prepare job descriptions that support equitable hiring practices, including removing unnecessary requirements, such as education or experience; using language that is neutral in terms of socioeconomic status and gender; only including what accurately reflects the responsibilities and skills required for the position; and posting an exact salary for the position (Giordano, 2022; Imholte, 2022; Matthews, 2022; McNamee, 2022; Musun-Miller, 2022; Saffoe, 2021). In addition, the literature calls for

museums to clearly define job roles and goals so that employees can set clear boundaries regarding the work they are asked to do (Lynch & Stokoe, 2020; Merritt, 2021a). The literature also suggests that hiring more diverse employees will require organizations to do the following:

- Expand their recruitment networks by posting positions on new or underutilized talent recruitment networks or job fairs, or via local colleagues or the community to fill the position (Henderson, 2021; Kosarin, 2021a; Musun-Miller, 2022). For volunteers, these recruitment networks may include referral sources, such as international communities, parents' groups, theaters, and community centers, among others (Kosarin, 2021a).

- Reevaluate candidate evaluation criteria to eliminate requirements or assessments that specifically align with dominant culture (e.g., how polished a candidate comes across) (McNamee, 2021). The literature also suggests using different types of assessments, providing candidates the opportunity to show their skills beyond their ability to interact socially, as well as holding more interviews to include candidates who might not appear to perfectly meet the desired skills and qualifications (Josey, 2021; McNamee, 2021; Musun-Miller, 2022).

- Restructure the hiring manager and volunteer manager roles to include a greater emphasis and training on DEAI (Cuno, 2021; Henderson, 2021; Kosarin, 2021a).

- Offer a wide range of roles, specifically for volunteers, including an emphasis on diverse skills and various schedule options (Kosarin, 2021a). For example, an art museum offers volunteer positions in both the back and front of house, to cater to those who are seeking a more administrative or social role (Kosarin, 2021a).

Addressing Other Barriers to Diversity in the Field

Belonging and representation. People of color who are interested in working in museums may encounter additional barriers to working in the field, such as a lack of representation in the profession. The literature suggests that organizations can combat the perception that certain groups or individuals do not belong in the field by highlighting the work of their diverse professionals through social media and ensuring that existing professionals are visible to and engaged with visitors (Jorgenson & Sevedge, 2019; Perkins, 2022; Saffoe, 2021). In addition, increasing the representation of people of color in the field through equitable hiring practices (as described above) may inspire a greater sense of belonging among those with similar backgrounds and encourage more people of color to choose the museum field as a career (Khalil, 2022).

Unpaid internships and lack of professional development. Additional barriers to diversity in the field are the proliferation of unpaid internships and the lack of professional development opportunities. Without offering compensation for an internship or apprenticeship, individuals who cannot afford to participate in an unpaid internship are excluded from beginning or advancing in their career (AAM, 2021). The literature describes steps that museums can take to make internships and apprenticeships more accessible by providing financial compensation (Khalil, 2022; Van Dyke, 2022). Similarly, many staff may struggle to afford professional development opportunities, so providing opportunities for on-the-job skill development can support their professional growth and career advancement (AAM, 2021; Koch, 2021). One art museum committed to developing its staff by creating pipelines for advancement within the organization, while a history museum committed to promoting from within when appropriate (Giordano, 2022; Koch, 2021). One individual says that professional development should start from a young age to create the next generation of museum professionals, and recommended mentorship as a method of initiating this (Perkins, 2022). The George Washington University emphasizes the multiple benefits of a mentorship program, including keeping retired or older museum professionals involved with the field to create relationships with younger professionals (Hernandez, 2021; Melber, 2022).

Creating a Collaborative Working Environment

The literature suggests that teams can implement practices to promote a cohesive team environment, including establishing core values, feedback mechanisms, or codes of conduct to guide daily actions and interactions in the workplace, with the overall goal of promoting an increased sense of psychological safety (Giordano, 2022; Redmond-Jones, 2021; Scott & Benham, 2021). These elements are crucial for the museum field, which often requires creative collaboration between team members (Scott & Benham, 2021).

For example, after experiencing leadership turnover that led to disruption, the exhibitions division of an aquarium dedicated time for the entire division to sit down and discuss building their workplace culture (Redmond-Jones, 2021). After setting ground rules and allowing for open discussion on what they did and did not want in working relationships, the division defined core values from which they would base their culture, including investing in healthy interpersonal relationships and committing to effective communication (Redmond-Jones, 2021). From then on, when employees had issues with one another, they could refer to the core values to guide their interaction in a manner consistent with those values (Redmond-Jones, 2021). Having such values is similar to a code of conduct, which outlines the organization's expectations regarding respectful behavior in the workplace (Giordano, 2022). To aid in the promotion of respectful behavior, some organizations have created feedback mechanisms intended to foster a trusting and collaborative environment in which people are willing to take risks in sharing and engaging with new ideas (Scott & Benham, 2021). One aquarium developed an approach that calls for staff to engage with someone's idea by explicitly discussing (1) what excites them about the idea; (2) how the group could build on the idea; and (3) what the group could consider changing (Scott & Benham, 2021).

DISCUSSION QUESTIONS:
1. What are the barriers museums face in adopting the compensation and well-being policies and practices covered in this section? What changes or supports would your institution need to adopt these policies and practices?
2. What policies and practices does your organization have in place to ensure the diversity of your workforce? What changes or supports would you need to ensure a diverse workforce?
3. What guidance does the field need on how to establish and maintain a collaborative work culture?

Topic 3: Operations

This section provides an overview of discussions in the literature related to operational changes that museums have made in the wake of the COVID-19 pandemic, the role of digital tools in exhibition and administrative operations, optimization of ticketing and pricing structures to maximize revenue and promote equity, and emergency preparedness planning for situations such as extreme weather and cyberattacks.

Digital Strategies and Tools

Recent literature explores examples of museums that have adopted digital strategies and tools to facilitate the visitor experience and streamline operations. It should be noted that one source included in this review, Cuseum, is a company that sells digital tools and platforms to museums. While the information they provide can be informative for museums regarding the tools and capabilities that exist, Cuseum represent a biased source, a fact that should be taken into consideration when reviewing the company's guidance and recommendations.

Digital strategies and tools to support the visitor experience. Museums have recently explored and instituted a variety of digital strategies to support the visitor experience, with a primary focus on audience engagement and accessibility. For example, before the pandemic, a historic house installed digital kiosks to standardize language on sensitive topics—by using preferred language more consistently than human tour guides might—and engage visitors with video lessons and demonstrations (Beemon, 2022). As an added benefit, the historic house found that the kiosks also supported social-distancing efforts when reopening during the COVID-19 pandemic by reducing the need for in-person staff. Similarly, a Smithsonian institution began to use virtual docents who greet visitors through video chats to help volunteers return to their duties without risk of infection (Kosarin, 2021b). By alleviating the need for volunteers to commute to the museum, this strategy also made volunteering more accessible to people with mobility issues and busier schedules (Kosarin, 2021b).

Cuseum recommends hybrid events to maintain engagement during the pandemic and create additional value for members (Cuseum, 2022b). Beyond pandemic-related considerations, Cuseum also recommends its software for translating museum materials through artificial intelligence, as translation makes materials accessible to a wider range of visitors and automates this otherwise labor-intensive process (Cuseum, 2021).

Finally, museums representing a range of disciplines—including natural history, automotive, art, and history—have experimented with augmented-reality exhibits to educate audiences through unexpected, often interactive, content (Davis, 2020). Lower-technology options such as projections and "magic" mirrors can be affordable, durable, and easy for visitors to use (Davis, 2020). The best augmented reality, according to the article discussing these projects, is "frictionless"—that is, "immediate," "intuitive," and "inclusive"—which is often easiest to achieve with simpler designs that do not rely on complicated hardware or software (Davis, 2020).

Although the literature tends to focus on the experiences of individual museums or provide general guidance on selecting specific tools, little is written on specific resources and their return on investment (ROI). Furthermore, although the literature highlights the successes of specific museums, this has not translated into field-level or common-practice frameworks for the design and implementation of virtual strategies or digital tools.

Digital tools to support museum operations. The use of digital tools to support museum operations is still emerging in the field, as evidenced by the fact that the literature in this section was overwhelmingly produced by organizations promoting their own digital tools (e.g., Cuseum). While recent literature from these sources highlights the usefulness of analytics and digital infrastructure for donations, digital memberships,

and digital facility reports, there is still work to be done to understand the effectiveness, value, and ROI of these tools. According to this literature, the following tools can bolster fundraising efforts, reduce administrative work, and facilitate collaboration between museums:

- The digital capture of tool usage and subsequent analytics can inform decisions to boost visitor engagement and membership, identify possible donors, and improve fundraising efforts (Cuseum, 2022b; O'Neill, 2022a).

- Digital membership programs can reduce administrative work, lower operational costs, and increase member satisfaction by replacing physical membership cards (Cuseum, 2022a, 2022b).

- Digital facility reports can make museums' data more secure and can facilitate communication and collaboration between museums by providing robust tools for describing museum facilities and standardizing measurements across organizations (Wieder, 2020).

Pricing and Ticketing Structures

The literature explores the reexamination of museum pricing and ticketing structures (also referenced in "Shifting to monthly memberships") and presents two diverging rationales for change: (1) maximizing revenue and (2) improving accessibility to fulfill museums' missions. However, these two goals are not always mutually exclusive.

Optimization of pricing strategies to maximize revenue. One article argues that making data-driven decisions about pricing can increase a museum's revenue. For example, an analysis of zoo/aquarium attendance fees across institutions can yield industry standards for the ratio in cost between full-price admission tickets and discounted tickets for children, allowing an institution to ensure they are maximizing revenue opportunities for children's ticket sales (Winfield, 2022). Another article discusses dynamic pricing programs—in which an institution would adjust ticket prices based on anticipated demand using factors such as time of year, day, and weather—implemented by a children's museum and a zoo (Townsend & Woerner, 2020). The museum and zoo primarily adopted dynamic pricing for mission-based reasons described in the next section of the report, but the article notes that dynamic pricing also can increase revenue (Townsend & Woerner, 2020).

Mission-driven pricing strategies. Ticket prices that are too high can be a barrier to museum access. To increase the affordability and accessibility of their exhibits, some museums have experimented with alternative pricing strategies, including "pay as you stay" pricing, dynamic pricing, and free museum memberships (Schoessler, 2020; Townsend & Woerner, 2020; Willsdon, 2021). To make its collection more accessible, a contemporary art museum recently experimented with a "pay as you stay" pricing model that offered discounted tickets with prices linked to the amount of time visitors spent in the museum (Schoessler, 2020). Similarly, a children's museum and a zoo both implemented dynamic pricing models to provide more options for ticket prices and to reduce crowds by distributing visitors more evenly across weeks and months (Townsend & Woerner, 2020). By discounting short visits or visits on days with lower overall attendance, these museums provided options for visitors who were unable or unwilling to pay full price for a ticket. Another article shares the example of a university art museum that recently implemented a free membership program to advance its mission by establishing a "less transactional, more relational" form of museum membership that values the community as much as revenue (Willsdon, 2021).

These programs have gained attention and public interest, but that may, at least in part, be due to their novelty. The literature does not yet document how these efforts would impact revenue over the long term or how a more widespread adoption would affect their success. For example, the contemporary art museum theorizes that its "pay as you stay" experiment may see diminishing returns as the novelty wears

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off (Schoessler, 2020). Similarly, a museum that makes membership free could potentially see an increase in donations in support of the experiment—but if free memberships become commonplace, museums that adopt the policy may not receive the same level of attention and goodwill.

Emergency Preparedness Planning

Although limited, current discussions call on museums to evaluate how they can prepare to take care of themselves and their communities in the face of a world that is "volatile, uncertain, complex, and ambiguous" (Santiago, 2022). Three specific threats called out in the literature for museums to consider are future pandemics, natural disasters, and cybersecurity threats.

Preparing for future pandemics and other public health crises. The IMLS-funded REopening Archives, Libraries, and Museums (REALM) project—a field-driven, collaborative effort to provide best practices for pandemic reopening—developed a playbook on overall pandemic preparedness strategies. The playbook recommends identifying a crisis management team; disaster-proofing essential museum functions, such as IT and human resources; and forming community partnerships and alliances with other cultural institutions to promote public health knowledge (Jardine & Musun-Miller, 2022).

Preparing for natural disasters. Guidance on natural disaster preparedness includes advice for preparing staff as well as facilities. Two articles call for institutions to prepare for extreme weather by building relationships with public safety officials and training staff throughout the organization in disaster preparedness (Foley & Wegener, 2020; Ghazi et al., 2020). Another offers examples of disaster preparedness training programs for museum staff that include leadership strategies, conservation of natural and cultural heritage, and risk assessments (Snell, 2022). Four articles present examples of renovations and design principles that can help different types of museum facilities and collections—including those in historic houses, large art museums, and public gardens—survive natural disasters, such as storms and extreme weather stemming from climate change (Dyer, 2022; Ghazi et al., 2020; Levine, 2019). Guidance includes replacing doors and windows, fortifying the ground level of a building, and moving collections and storage areas to higher floors (Dyer, 2022; Flynn, 2020; Ghazi et al., 2020). In addition, historic houses might relocate their building to a safer place, and gardens might focus on building seawalls, adding drainage pumps, and relocating fragile plants (Dyer, 2022; Levine, 2019). Other types of museums, such as zoos and aquariums, may require different guidance.

Preparing for cybersecurity threats. Cyberattacks can endanger museums, their partners, and their visitors. One article highlights these threats, citing recent attacks targeting museums and nonprofits, museums' increasing reliance on technology to manage collections, and museums' use of technology to collect visitor, member, and donor data (Cuseum, 2019). This article recommends planning ahead, investing in cybersecurity software, training staff, and finding leaders for cybersecurity preparedness within the museum or board (Cuseum, 2019). Another article provides general best practices and guidance on ransomware, although this guidance is not specific to museums (Merritt, 2020b).

DISCUSSION QUESTIONS:

1. What evidence is needed on the value and ROI of digital tools to support the visitor experience and museum operations?

2. What additional research is needed to understand the trade-offs involved in alternative pricing strategies?

3. What values does your organization prioritize in your relationship with vendors?

4. What has your institution done to prepare for possible future threats? What do you think you need to do to prepare? What guidance or support does the field need to support strategic planning for resiliency in the face of future threats?

Topic 4: Boards and Leadership

This section discusses board membership—including the behavior and composition of boards—and leadership models, including best practices for museum leaders and considerations for the reform of museums' organizational structures. The articles in this section primarily confront the problems caused by rigid board and organizational leadership hierarchies and organizational silos that limit knowledge sharing and perpetuate inequities.

Board Membership

This subcode examines the discourse on reforming museum boards so that they are more diverse and inclusive.

Diversity in board composition. The literature discussing board composition, while limited, calls on museums to examine their board membership for diversity and ethical behavior (Carr, 2021; Merritt, 2019b). One article emphasizes the importance of age diversity in board recruitment, arguing that prioritizing age diversity alongside other demographic characteristics complements DEAI efforts because younger generations are demographically more diverse. It also suggests that including younger board members can have long-term economic advantages even if younger members currently have less ability to contribute financially to museums. In the near-term, younger board members could support improved engagement and create a groundwork for long-term donor relationships. As these younger members advance in their careers, they ultimately could grow into the donors themselves (Carr, 2021).

One blog post about the creation of a prison museum noted that the museum's board includes people who can represent and give voice to lived experiences relevant to the museum, such as people who are incarcerated and their families, correctional officers, prison administrators, and crime victims (Glass, 2022). Conversely, another article acknowledges the moral complexities of board participation and donations by individuals whose financial capital is tied to companies or products that may conflict with the museum's mission and values (Merritt, 2019b). The article recognizes both the importance and the ambiguity of museums' responsibility to address "toxic philanthropy," especially when these donors may provide funds on which museums rely (Merritt, 2019b).

Alternative advisory bodies. One article presents the idea of an auxiliary leadership advisory body as a complement to an official board for involving community members in museum decision making. It provides the example of a children's museum that created a guild for parents to participate in museum leadership without the need to join the board or make the associated financial commitments (MacDougall, 2021). This museum's guild focuses on fundraising efforts—including managing a fundraising event and determining how a portion of museum funds would be used (MacDougall, 2021).

Leadership Models

This section explores recent literature related to models of museum leadership, including articles that focus on deconstructing silos within museums and those that advocate for flattening the leadership hierarchy across staff. This section also includes literature related to strategies for effective decision making and fostering a culture of trust and creativity within an organization.

Deconstructing silos within the museum. Three articles describe leadership models that focus on collaboration and emphasize the importance of blending different perspectives, skill sets, and areas of expertise. Each of the innovative programs described below stem from frameworks that prioritized collaboration and experimentation.

- *Learning organization.* One article describes a natural history museum's attempt to evaluate the extent to which a new exhibit allowed the museum to become a learning organization, whereby leaders encourage staff to innovate and grow the museum through autonomous collaboration, goal setting, and inquiry (Korn et al., 2021). To assess whether the museum was a learning organization, it considered staffers' sense that they could experiment, collaborate, and share knowledge and feedback (Korn et al., 2021).

- *Transformational and distributed leadership models.* Another article describes how a science museum operationalized transformational and distributive leadership models (Letourneau et al., 2021). This article defines transformative leadership as innovative and future oriented, and it defines distributive leadership as collaborative (Letourneau et al., 2021). In synthesizing these models, the museum sought to foster innovative thinking, mutual respect among collaborators and their individual perspectives, experimentation, and reflection (Letourneau et al., 2021).

- *Collective achievement design.* A third article discusses an art museum's efforts to create interdisciplinary STEAM programming that acknowledges the linkages between art and science (Casadio, 2021). The article cites collaboration and innovation as key aspects of these efforts, and describes a leadership model characterized by trust and egalitarianism, goal setting, accountability, and a sense of "collective achievement" (Casadio, 2021).

A commonality between the leadership models described above is that they require deconstructing silos within the museum such that staff from different groups and with different kinds of expertise work together to develop programming. The literature describing each of these models argues that collaboration across disciplines boosts innovation, fosters inclusivity, and helps museums create educational exhibits (Casadio, 2021; Korn et al., 2021; Letourneau et al., 2021).

Flattening the hierarchy. The disruptions in museum operations caused by the COVID-19 pandemic, combined with a growing awareness of the need to combat systemic inequalities, have led to a reappraisal of museum hierarchies and opportunity for experimentation with new structures (Decter & Yellis, 2020b; Oh, 2022). Some articles that argue for deconstructing staff hierarchies suggest that organizations that do so are more equitable for employees and better suited for confronting systemic racism across society (Garcia, 2022; Oh, 2022; Vagnone, 2022). Another article suggests that organizations can make these seemingly sweeping changes incrementally, with the confidence that changes are reversible, if needed (Decter & Yellis, 2020b).

In particular, the current literature discusses a need to "flatten the hierarchy" and create egalitarian, inclusive leadership structures (Decter & Yellis, 2020b). One article describes museums as having an impractical "'hourglass' structure" that positions the CEO not at the top of the organization but in between the board and the staff; this article advocates instead for a cylindrical structure that promotes equity among staff (Garcia, 2022). A cylindrical structure distributes both decision-making agency and financial compensation more evenly throughout an organization (Garcia, 2022). Two articles cite the importance of financial equity in an egalitarian museum (Garcia, 2022; Vagnone, 2022), with one of those articles suggesting that the degree to which a museum has succeeded in implementing an egalitarian structure can be assessed based on factors such as compensation between the lowest- and highest-ranking employees and the number of staffers who have to take on second jobs to make ends meet (Garcia, 2022).

In response to the pandemic and the need to confront systemic racism, a natural history museum developed a more flexible, democratic structure that included collaboration, transparent communication from leadership, and "[self]-organized affinity groups" championing DEAI efforts (Oh, 2022). Working autonomously, this museum's staff created popular digital content throughout the museum's physical closure and guided the museum toward becoming an anti-racist organization (Oh, 2022).

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Practicing evidence-based and data-driven decision making. Select literature discusses the best way for museum leadership to make thoughtful, informed decisions. One article argues for the development of think tanks to develop and share institutional and disciplinary knowledge among museum leaders (Decter & Yellis, 2021). This article notes the lack of interdisciplinary organizations that can provide expert, evidenced-based guidance for museums on policy and best practices (Decter & Yellis, 2021). It acknowledges the recent development of small, informal organizations aimed at evaluating the museum field through a DEIA lens, facilitating networking, or sharing practical knowledge, and it suggests that these efforts should grow to become more permanent and robust (Decter & Yellis, 2021). Another article describes a children's museum's data-driven leadership approach of synthesizing results from visitor surveys with local contextual factors (e.g., health policies, weather, current events) to gauge visitor satisfaction, track how visitors engage with exhibits, and make decisions about pandemic public safety (Zarov, 2021). The museum used John Doerr's "Measure What Matters" Objectives and Key Results approach and the Net Promoter Score survey question "Would you recommend our museum to a friend or family member?" as instrumental for gathering data (Zarov, 2021).

Fostering a culture of trust and creativity. Two articles focus on the need for organizational leadership to build trust and foster creativity (Gupta et al., 2021; Leftwich, 2022). One article argues that such a culture is fostered by ethical leaders who are aware of people's worth, have an ability to build trust, hold an inquisitive mindset, and are willing to reflect (Leftwich, 2022). A second article suggests that middle managers can facilitate trust between museum employees and leaders by giving museum employees a shared vocabulary and a sense of mission to foster dialogue about social justice and the challenges of the pandemic. This article also challenges middle managers to remain aware of their own implicit biases so they can fulfill this role (Gupta et al., 2021).

DISCUSSION QUESTIONS:
1. In considering how to diversify board membership, what experiences (both lived and learned) are important for the successful leadership and oversight of your institution?

2. What guidance would support your organization in working and communicating with your board?

3. What is the leadership structure at your organization? What guidance or supports would your organization need to identify an alternative or more expansive leadership model and implement it?

4. What information about leadership models is missing from this overview?

Topic 5: Role of the Museum in Society

A common topic of discussion in the literature is the expansion of the role of the museum to address pressing sociopolitical concerns, both through traditional activities, such as exhibitions, programming, and education, as well as through the less traditional approach of supporting the local community within which the museum is located. One author points out that the International Council of Museums' (ICOM) updated definition of a museum emphasizes an active role for museums in several new topical areas—including diversity, sustainability, accessibility, and ethical practice—providing a road map for action (Cascone, 2022). One article in particular proposes a model of an "empathetic museum," which calls for museums to increase their awareness of (1) their position within a history of colonialism and racism; (2) the experiences of their local community; and (3) the impact that the museum's choices have on members of their community. Once museums have increased their awareness, they must accept what they have learned and take action to make changes to policies and practices, both within their organization and in the community (Jennings et al., 2019). According to this author, an empathetic museum will:

- function as an anchor institution in the community;
- recognize that it is perceived as exclusive and non-welcoming to certain groups, and take steps to communicate to those groups that they belong;
- acknowledge its complicity in a history of colonialism, White supremacy, cultural appropriation, and exclusion, and take steps to address its past through exhibitions and programming;
- establish equal partnerships with organizations to support the community and enact change; and
- continuously measure and report on its public impact, while revisiting previous goals and establishing new ones (Jennings et al., 2019).

Given these considerations for expanding the role of the museum, this section describes discussions in the literature providing guidance for and examples of museums that have reached out to new audiences using new approaches (e.g., social media), and redefined the work of the museum as related to exhibits and programming, as well as community impact.

Outreach to Diverse Audiences

The literature suggests that the audiences of museums tend to lack diversity. For example, one study of performing arts organizations across the country found that their audiences do not represent the racial or economic diversity of their local community, but investing in marketing to diverse groups has a positive impact on audience diversity (Voss et al., 2021). Similarly, a Culture Track study identified a lack of diversity in the audience lists of their 650 participant organizations (Crowley, 2021). These articles provide guidance for organizations to (1) engage in self-reflection about the ways in which the organization welcomes or excludes diverse visitors; (2) set goals for audience diversity and measure progress; (3) rethink marketing approaches to expand outreach to new audiences in diverse, culturally relevant ways; and (4) invest in outreach (Crowley, 2021; Voss et al., 2021). Other articles offer suggestions for museums that want to connect with new audiences, particularly audiences of color, those with accessibility needs, and youth. This guidance calls for museums to:

- understand existing and new audiences (e.g., conduct regular surveys), and make sure their interests and values are reflected in the museum's content (Klibanoff, 2021; Souza, 2020);
- develop partnerships with influencers, brands, organizations, and community members that know and have established trust with the community to help build authentic relationships with new audiences and ensure that outreach meets their needs (e.g., accessibility) (Johnson, 2021b; Souza, 2020; Wuertenberg, 2020);

- make sure that internal changes to the museum (e.g., collections and exhibits, education, staffing) meet visitors where they are and demonstrate that the organization values diverse audiences (Klibanoff, 2021; Souza, 2020);

- include youth on advisory committees rather than convening a separate youth council (Klibanoff, 2021);

- ensure that the organization's website is accessible to people with visual impairments (Wuertenberg, 2020);

- offer opportunities to experience the museum virtually so that audiences can test out the experience before visiting in person (Souza, 2020);

- recognize the history of relationships between cultural institutions and people of color (Johnson, 2021b); and

- use social media as an outreach approach (Crowley, 2021; Klibanoff, 2021).

In addition, organizations have used special events as outreach opportunities with more diverse audiences. For example, several zoos and aquariums have held events to demonstrate that they welcome and value their local LGBTQ community, such as a holding a drag queen story hour for Pride Month, flying the pride flag, offering a Pride Family Night in partnership with local organizations, and celebrating International Family Equality Day (Canopy Strategic Partners, 2022a). Another organization, a history museum, celebrates several heritage months (e.g., Black History, Hispanic Heritage, Native American Heritage) and dedicates the first week of October to exploring different areas of focus on how they can better serve their visitors. For example, one day focused on accessibility, giving museum staff and visitors the opportunity to discuss the purpose and value of the museum's sensory backpacks program (Nalls, 2022b).

Social media. The literature describes social media as an opportunity for the museum to "show its soul" (Zobczak, 2022), reach new audiences (Souza, 2020), and build a community of online followers who may ultimately become in-person visitors (Maher, 2022). To do so effectively, the literature points to the need for museums to identify compelling stories that are relatable to their audiences and share them in a way that is relevant to them (Maher, 2022; Souza, 2020; Zobczak, 2022). To be relevant and relatable, museums must know their audience's social media preferences and be aware of story content that is trending (Maher, 2022; Souza, 2020; Zobczak, 2022). The literature also recommends creating a social media strategy and identifying a dedicated staff position for a social media manager who sits on the leadership team (Maher, 2022; Souza, 2020). This person should be aware of the activities and plans the museum is undertaking and work collaboratively across departments to understand what they would like to see on social media (Souza, 2020). Museums also should understand how social media algorithms work to help increase the likelihood that audiences see posts (Nall & Noah, 2022; Zobczak, 2022). Social media managers should measure the engagement, amplification, reach, and transactions from their social media content in general (Maher, 2022).

The literature recognizes that, since 2021, social media has become more dominated by video, which has become less polished to signal its authenticity (Maher, 2022; Zobczak, 2022). Although video, and TikTok especially, has become an effective way to reach new audiences and can enhance the visitor experience (Maher, 2022; Smith, 2022), the literature also points out that establishing and maintaining a successful TikTok presence is a massive undertaking in terms of time, creativity, and commitment. It requires vision, broad support, and more resources than a single individual can realistically take on (Smith, 2022). With that said, a history museum found success with content that engages with comments and viral video trends to remain relevant (Smith, 2022). In response to the popularity of TikTok and changing video content, one children's museum altered its approach to video production to use vertical clips, shorter videos with an early visual hook, and a less polished production style (Ostfeld & Yau, 2022). The museum found that videos that responded to viral trends were more successful (Ostfeld & Yau, 2022).

Redefining the Work of the Museum: Exhibits and Programming

The literature calls for museums to produce exhibits and programs with diverse representations by incorporating new narratives that reflect the complexity of intercultural exchange, reconsider curatorial authority, take a stand on key social and political issues of the moment (e.g., racism, the opioid crisis, criminal justice, environmental sustainability), and consider their responsibilities in decolonization and restorative justice.

Recognizing competing values related to interpretation, curatorial authority, and the societal aims of an exhibit, one article presents a framework to support museums in reflecting on past exhibits and developing new ones that align with their values. The framework includes three dimensions of analysis, each with competing values: (1) whether the interpretive focus is on the object or designed for the visitor's personal meaning-making; (2) whether the curatorial power rests with an individual or in collaboration; and (3) whether the exhibit is intended for broad access or to inspire social action (Rowson Love et al., 2021).

Challenges to change. The literature acknowledges that the field's long-standing connection to colonialism and racism makes it challenging for museums to change the way that they construct and communicate knowledge and to advocate for social justice and change (Ambroso, 2020; Jennings et al., 2019). One article in particular points to museums' long history of silence when confronted with urgent social and political issues—typically with the justification that museums must remain neutral, but also out of fear of controversy and donor reactions (Jennings et al., 2019). Also contributing to the difficulty of change, and as noted in prior sections, is that museums continue to lack diversity in their staff—particularly within professional and leadership positions (Jennings et al., 2019). Finally, when institutions do take steps toward change, they tend to create programs or initiatives are that are siloed or unique, rather than approach the issue in a systemic and intersectional way that requires change at all levels and in all aspects of the institution (Jennings et al., 2019).

Incorporation of diverse representations. The literature describes museum professionals and audiences calling for museums to curate exhibits that reflect diverse identities and narratives and connect with diverse audiences (Ambroso, 2020; Culture Track, 2021; Obrist, 2021). To do so, museums must critically examine their treatment of identities that have been oppressed within the museum space (e.g., race, class, gender) and amplify diverse and intersectional voices, including Black, Indigenous, and other people of color (Ambroso, 2020; Isselhardt & Cross, 2020; Martinez, 2020). Several articles provide guidance on how museums can incorporate new identities and narratives.

- One article offers best practices for museums to cultivate knowledge about historically oppressed identities, including (1) designing exhibits that undermine stereotypes of otherness; (2) filling gaps in representation in both exhibits and the museum's relationships; (3) prioritizing first-person narratives; (4) providing visitors a space for reflection (e.g., a response wall or videos); and (5) rejecting absolute curatorial authority and partnering with people who have lived experience in the subject of the exhibit (Isselhardt & Cross, 2020).

- Another provides guidance for narrating the innumerable stories and voices that make up a history, suggesting that institutions (1) tell critical, inclusive stories even if they are challenging or unsettling; (2) focus on stories about individual agency, particularly community activists, to highlight social and political change; and (3) explore crises to understand their power to illuminate how communities have been defined—including who is excluded (Decter & Yellis, 2020a).

- Yet another suggests that museums should incorporate regular reflection on existing exhibits to ensure that there are opportunities to reconsider the narratives they present (Martinez, 2020).

Contextualization of existing exhibits. As part of diversifying narratives, the literature calls for museums to incorporate context, cultural exchange, dialogue, and hybridization into their exhibits such that canonical works that historically have been considered neutral are critically paired with previously excluded or marginalized works to present alternative or more complex narratives (Ambroso, 2020; Obrist, 2021). For example, the literature describes two art museums that are shifting away from traditional art displays that focus on paintings primarily by White men toward galleries that contextualize those works, telling more historically complex narratives accompanied by art from Indigenous artists (Small, 2022). In addition, a historic home describes how the institution's single narrative became more reflective of its diverse history when museum leadership and the board became willing to discuss the connections of the homeowners to slavery across the South, included stories of enslaved people who worked in the space, and documented the families—both White and Black—who lived on the property after slavery was abolished (Hawkins, 2022). Another article points to university art museums as an example of cultural institutions that have been doing important work to decenter their past canon and make space for alternative narratives. To support change, they prioritize their relationships with the community above their collections by establishing partnerships (see "Community engagement and partnerships," below), supporting local artists, and being self-reflective about the ways in which they have excluded or marginalized segments of the community in the past (Olsen, 2022).

Experimental methods. The literature also presents new and experimental methods for designing exhibits, developing programming, and otherwise supporting systemic change. For example:

- One organization is using a biennial civic exhibition to bring art into a community in a way that would better serve community members. To design the exhibit, the organization has engaged with the community in new ways and in new spaces, incorporating the voices of community members through storytelling and documentation (McAnally, 2021). Once completed, the art will be exhibited primarily in underfunded areas of the city, including in schools, community gardens, historic houses, and two museums that focus on Black history (McAnally, 2021).

- Another article suggests that art museums could use their influence and reputations to bolster the standing of emerging women artists and artists of color, identities that historically have been marginalized in the art world. The author suggests that art museums use their capital and influence to buy works and celebrate emerging artists, subsequently increasing the value and status of their art (Merritt, 2019a).

- Finally, a public art organization that convened a group to think about the role of arts and culture in social and systemic change (Logan & Ludwig, 2022) shares guidance about how to enact change through exhibits and programs. The group argues that cultural institutions have a responsibility to (1) go beyond listening to taking collective action; (2) know the needs of their communities; (3) compensate workers, artists, and Indigenous groups fairly; (4) prioritize collective efforts over exceptionalism; and (5) work to repair relationships with communities that have been excluded (Logan & Ludwig, 2022).

Decolonization and restorative justice. The literature also questions what decolonization and restorative justice for oppressed communities could look like. One author questions whether what is needed in the current moment is deconstruction—an "anti-museum" with an emphasis on actions such as "demythologize, dismember, displace, undo, and substitute" (Ludwisiak, 2021). Other articles share examples of how specific organizations are working toward decolonization and restorative justice. For example, one art museum has made a custodianship arrangement with a Mayan artist, based on terms set by the artist. The museum will display his installation for 13 years, support the required ritual for installing the art, pay the artist for the custodianship, and make a donation to a Mayan cause chosen by the artist (Abrams, 2021). Another contemporary art museum representative argues that for institutions to decolonize, they must return land to Indigenous populations and cultural possessions to their appropriate owners (Merritt, 2020a). In fact, in

late 2021, this museum transferred its land and building to a foundation for Indigenous arts and cultures and dissolved as an institution (Merritt, 2020a). In an interview, the museum representative acknowledged that they were a small institution that did not have a mandate for collecting and that their board was comfortable taking risks; however, the representative called for organizations with archives and collections to address the colonialist and extractive nature of their work (Merritt, 2020a). A third university-based museum created a team to focus on DEAI and decolonization. The team's work includes developing and maintaining relationships, particularly with Indigenous groups, to ensure that they are included and consulted in the work of the museum (O'Neill, 2022b). A representative of the museum shared that they do not have an end goal to their decolonization work precisely because it is ongoing, relational work that continues to change with the people involved (O'Neill, 2022b).

Curatorial roles. The literature also calls for museums to rethink expertise and curatorial authority, and argues that to ensure that previously excluded identities, narratives, and contexts are represented within museum spaces, institutions must begin to share the role of curator with their audiences and local community (Ambroso, 2020; Martinez, 2020; Merritt, 2020a; Morrissey & Dirk, 2020). This includes diversifying leadership positions in the museum by hiring curators of color who are more likely to diversify identities in the museum and contextualize traditional narratives with diverse representation (Johnson, 2021a; Merritt, 2020a; Small, 2022). Sharing curatorial power also could mean handing curatorial control over to people with diverse lived experiences, such as incarcerated artists (Thomas, 2022); cocreating with Indigenous or other communities (Ambroso, 2020; Small, 2022); or creating a team of multiple curators (McAnally, 2021). The literature includes several examples of art and history museums that have engaged and partnered with community members and people with lived experience (e.g., Indigenous communities, people struggling with opioid use, formerly incarcerated individuals) to shape collections and develop exhibits and programs through input, storytelling, oral histories, interpretation, and partnerships (Ambroso, 2020; Ferree, 2020; Isselhardt & Cross, 2020; Martinez, 2020; McAnally, 2021).

Alternative perspectives. By presenting diverse and alternative narratives, the literature argues, museums can broaden their visitors' perspectives and support social justice and change (Ferree, 2020). As one article argues, exhibits are "always local and political" (Ambroso, 2020). For example, one article calls for museums to share stories about the experiences of Black Americans throughout history, arguing that it is the duty of museums to share difficult, honest stories about the Black experience to fight the oppression of Black Americans (Jackson, 2020). The literature includes several examples of museums that have developed programming to inspire change.

- A history museum has developed an exhibition on the opioid crisis to inform visitors about its history, support an empathetic understanding of those experiencing addiction, and encourage visitors to take action to support solutions (Ferree, 2020).
- A prison museum is being designed and developed with the aim of challenging its audience to imagine a more equitable justice system (Glass, 2022).
- An art museum implemented several exhibitions and art installations that focus on different perspectives of the environment and climate as part of its larger initiative, Climate + Environment, to educate and encourage action on the climate crisis (Winchell, 2021).
- A land conservancy and art museum have explored the intersectionality of art and the environment by incorporating the conservancy's strategies on restoration and ecological landscape into the museum's programs and exhibits (Maley & Jorgenson, 2022).

Programming to support change is not only in the purview of art and history museums. For example, an alliance composed of the Association of Zoos and Aquariums, companies, and nonprofits has collaborated to develop exhibits and programs that raise awareness about wildlife trafficking and support taking action

for change ([Silver, 2022](#)). One exhibit, installed at an airport, provides education about how people can make responsible, sustainable decisions that protect wildlife at risk of exploitation ([Silver, 2022](#)). In addition, a zoo encourages visitors to develop empathy for the animals and take action on the climate crisis by doing "citizen science" in their backyards at home, collecting data on animal behaviors throughout their visit, and encouraging them to take action to change their own individual behaviors ([Gonzales, 2019](#)).

Community engagement and partnerships. One way to broaden perspectives in museum exhibits and programming is to cocreate programs and exhibits with community members ([Markovitz & Singer, 2021](#)). These partnerships between museums and community members support intercultural exchange and allow museums to understand the needs and perspectives of their communities through a creative process ([Markovitz & Singer, 2021](#)). One article offers the following guidance for museums on how to cocreate programs that are driven by the interests of their communities. Museums should:

- prepare to have their assumptions about the community challenged;
- learn about the community through a review of existing literature and by speaking to community members;
- spend time with community partners to build a strong relationship before inviting them to collaborate (e.g., attend their events, volunteer space or time to support them, be an ally);
- cocreate and codesign collaborations; and
- evaluate the programs or projects by asking for feedback from both partners and visitors ([Markovitz & Singer, 2021](#)).

Museums can develop partnerships with any community member who has an interest in or connection to the work that the organization is involved in—including residents, artists, and leaders—and can engage with them in a variety of ways. For example, an aquarium partnered with children directly to develop a video series, including getting their input on topics for the series, video content, episode titles, and distribution channels ([Kerr, 2019](#)). The museum suggested that a key factor in the success of the video series was that they had made decisions based on direct input from children and their caregivers. Similarly, a university art museum partnered with formerly incarcerated women to develop an art exhibit focused on their lived experiences ([Ruffin, 2020](#)). The museum paired each of the formerly incarcerated women with artists and community organizations to create pieces that would build empathy toward incarcerated persons, highlight the role of systemic racism and slavery in the prison industrial complex, and challenge misconceptions about community members who go to prison ([Ruffin, 2020](#)).

Redefining the Work of the Museum: Community Impact

Recent literature, including the 2021 and 2022 TrendsWatch reports from the American Alliance of Museums' Center for the Future of Museums, highlights the importance of museums playing an integral role in the community as institutions that are aware of and respond to the needs of their community members, especially the most vulnerable ([AAM, 2021](#); [AAM, 2022](#)). This role is different than the museum's traditional role of curating exhibitions and developing programs for visitors.

For example, the 2021 TrendsWatch report calls for museums to address historic inequities in wealth by using their influence, reach, reputation, and financial power through activities such as supporting increased opportunity for community members through training and certification, defending equal access to political power and decision making, creating accessible programs for artists and other creators to sell their products, prioritizing local businesses and businesses of color for museum contracts, and partnering with local businesses and community-based organizations in ways that are beneficial for them and the community. The report also advocates for impact and restorative investing (see "[Topic 1: Financial Models and Sustainability](#)")

and providing services to support vulnerable people within the community, such as donating the produce or flowers from museum gardens to food banks or hospitals, or providing resources to students during the pandemic (e.g., laptops to access museum programming, a quiet place for virtual schooling, safe spaces for at-risk students) (AAM, 2021). In addition, the 2022 TrendsWatch report explicitly points to the role that museums should play within a community as part of the essential infrastructure by providing education to children, engaging senior citizens, addressing mental health, and responding to community crises, such as the COVID-19 pandemic (AAM, 2022).

The Association of Children's Museums Trends Reports team recommends specific questions for leaders of children's museums to consider when designing programs for the community to complement or extend existing programs. The questions emerged from analysis of a survey of children's museums regarding the COVID-19 pandemic's effects on children's museums, but could be easily adapted by leaders of museums in other disciplines. The questions include the following: (1) What are children's museums suited to address that schools might struggle to provide? (2) What other new roles might children's museums fill during this crisis and beyond? (3) Who is in need of support that can be met by the resources of a children's museum? The team also suggests developing a collaborative working group of institutional leadership of various children's museums to address the above questions (Association of Children's Museums, 2020).

Community support. The literature includes examples of organizations that have taken actions that align with the guidance in the two most recent TrendsWatch reports. An art museum offers free arts programs to support mental health in the community (Lowenburg, 2020), a musical instrument museum created a virtual program for the elderly (Merritt, 2022), an aquarium created a scholarship program to award $10,000 each to 10 African American students scholars to study marine science (Brown, 2021), and four museums across the country supported the U.S. Census Bureau by communicating to the community the importance of their participation in the census (AAM, 2020a). The museums combated low response rates from their surrounding communities by developing creative social media campaigns and events to increase both awareness and engagement among the surrounding communities about the census (AAM, 2020a).

Disaster response. Museums also have an opportunity to support their community during climate disasters (e.g., fire, flood, extreme heat or cold) and public health emergencies. The literature details examples of museums that have recently supported their community during disasters, including providing physical space for meetings between emergency response personnel, such as police and fire department services; a temporary space for displaced and evacuated community residents to stay; and spaces of refuge for communities during extreme weather and power outages (Gray, 2021; Mason, 2021; Russo, 2021). In one instance, during an extreme cold period in Texas when many experienced systemic power failures, an art and science museum waived admission fees for local residents and offered their space as a warming center and a place to charge community members' devices (Gray, 2021). In addition, because staff at a California cultural and natural history museum are public employees, they can be reassigned as disaster service workers during public emergencies such as the COVID-19 pandemic (Gray, 2021; Mason, 2021; Russo, 2021). The director of the museum argued that "serving as disaster service workers both highlighted and enhanced our [staff's] essential role as public servants" (Gray, 2021; Mason, 2021; Russo, 2021).

Environmental sustainability. The literature also describes the role of museums in taking action to address climate change and environmental degradation. The 2022 TrendsWatch report advocates that museums question the ubiquitous "more is better" model of economic growth and reconsider traditional metrics of success that have guided their decision making—attendance, new buildings or expansions, and collection size—in favor of metrics that align with a more environmentally responsible approach (AAM, 2022). The report offers examples of how museums can take action to support the environment and mitigate climate change, including designing a plan to limit attendance, thus supporting broader attempts at sustainable

tourism; deaccessioning and slowing collection growth through joint acquisitions and collection sharing to reduce the space and resources required to house collections; and putting a halt to overbuilding facilities (AAM, 2022). Several other articles provide additional recommendations for how museums can practice environmental sustainability.

- To reduce the costs and environmental impact of touring exhibitions, one article recommends the field rethink its approach and expectations for this type of exhibit. The author advocates for decreasing the number of touring exhibitions, allowing museums to keep them for a longer duration, and improving national and international collaboration regarding the tours to support more sustainable practices (Merriman, 2020).

- To decrease carbon emissions, another article argues that museums should reduce consumption rather than rely on carbon offsets for carbon neutrality (Merriman, 2020). In particular, the author recommends using the methodology from a paper written by Sarah Nunberg and colleagues as a guide for calculating the carbon emitted per viewing for a planned exhibition (Merriman, 2020; Nunberg et al., 2016).

- A third article suggests that museums commit to the Leadership in Energy and Environmental Design (LEED) building standards and adopt strategies such as carbon offsets, tree planting, and reforestation (Lee, 2020).

- A natural history museum has provided tools, support networks, and connections to advocacy organizations to support their visitors taking action in order for them to advocate for climate action with governments, businesses, and other organizations (Merriman, 2020).

- Finally, two articles recommend that museums consider how their stores can reflect the museum's commitment to sustainability by ethically and sustainably sourcing their products and using best practices for sustainability in the store design and displays, such as selecting eco-friendly material and LED lights (Lee & Froehle, 2021; Winchell, 2021).

Data on how an institution's energy use compares with others in their discipline would enable museums to make strategic plans and take concrete steps to reduce their energy consumption. However, as one article points out, very few museums have the capacity to track or analyze this data (Shapiro & Sutton, 2022). To fill this gap, IMLS has funded a two-year study of at least 150 institutions across the United States that will establish an estimate of the carbon footprint for the museum field and work with the institutions in the study to create plans for more efficient energy consumption (Shapiro & Sutton, 2022).

The literature reports that several museums have taken action toward environmental sustainability. For example, a children's museum made a commitment to sustainability as a part of its 2020–2025 strategic plan and has incorporated environmental sustainability, along with financial performance and social responsibility, as a metric to assess the museum's success (Cutrer, 2022). In addition, the literature describes two history museums that have reduced the energy required to safely display collections and art: in one case, by implementing microclimates—that is, shrinking the area under controlled temperature and humidity conditions to just around the object of display—and in the second case, by using a preconditioned silica gel around frames or within display cases (Lee & Krish, 2021).

Other museums have added staff responsible for managing their response to climate change. For example:

- A large art museum has staffed a curator dedicated to climate change to support the development of exhibits and programming on climate change (Maley & Jorgenson, 2022).

- Another large art museum formed a group tasked with generating ideas, assessing problems, and suggesting opportunities for leadership in response to the climate crisis (Winchell, 2021).

- A children's museum hired an environmental sustainability manager whose responsibility includes managing the museum's sustainability plans and developing programming related to sustainability and resiliency (Cutrer, 2022).

DISCUSSION QUESTIONS:
1. What are the most pressing social and political issues in your community? How are you responding to those issues through exhibits and programming? What guidance or support do you need to develop and implement exhibits and programming that address the need for change?

2. What partnerships does your institution have with members of the community? How can you further develop those partnerships? How can you share curatorial power with them?

3. What tools do you have to measure social impact? As the role of the museum is shifting to include community impact, what guidance or support do you need to assess your organization's impact?

4. Who are your organization's existing audiences? Who is missing? What guidance or support does your organization need to learn more about your diverse audiences (both existing and new) and how to connect with them?

5. To what extent are your exhibits and programs representative of diverse audiences? What steps can you take to increase the representation of diverse audiences? What guidance or support do you need to do so?

"Could we imagine getting rid of entire collections and leaving exhibition halls empty? Could we forget the images we already know, and histories they represent? Could we imagine engaging local communities in decision-making processes? Could we imagine an entirely Black or Sami or Aboriginal collection on display? Could we imagine a community instead of a collection?" (Ludwisiak, 2021)

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