

What Comes First

Your Guide to Building a Strong, Sustainable Museum or Historical Organization (With Real Life Advice from Folks Who've Done It)

by Joan H. Baldwin



MUSEUM ASSOCIATION
OF NEW YORK

The Museum Association of New York: Professional Excellence Through Partnership for All New York State Museums

What Comes First

*Your Guide to Building a Strong, Sustainable Museum or Historical Organization
(With Real Life Advice from Folks Who've Done It)*

The Museum Association of New York
265 River Street
Troy, New York 12180

T: 518.273.3400
F: 518.273.3416
E: info@manyonline.org

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Introduction

It seems a natural outgrowth of our many years of work in support of strong organizational development rooted in high professional standards that The Museum Association of New York (MANY) would turn to writing its own guide for individuals and groups thinking about starting a museum or heritage organization. While MANY generally works with and for already established institutions, the rapidly changing societal and economic environments in which all cultural organizations now operate exert some of their greatest pressure on start-ups.

In developing this discussion guide, our hope is to encourage you to stop and take a breath, to delve deeply into organizational and professional issues, reach out to museums and heritage organizations (and the agencies that serve them) to gather information and ask questions, and build a strong rationale for starting an organization that has at its heart the public trust. In addition to checklists of prompting questions, you'll find this guide jam-packed with no-nonsense tips and real life advice from colleagues across the state. We believe this guide will help you to determine if founding a museum or heritage organization is in the best long-term interests of your community or if a different type of programming or service would be more valuable.

Our sincerest thanks to the many contributors of real life advice, who added their unique personal perspectives to this guide, and to our many manuscript readers, who offered us very helpful advice of their own toward the development of this publication. Our readers included **Kristin Herron**, Director, Museum Program, New York State Council on the Arts; **Joy Houle**, Executive Director, Saratoga County Historical Society; **Linda Norris**, Managing Partner, Riverhill; **David Palmquist**, Program Manager, Chartering Office, New York State Museum; and **Susie Wilkening**, Senior Consultant and Curator of Museum Audiences, Reach Advisors.

And special thanks to the guide's author, Joan H. Baldwin, who has written so many of the association's publications. Joan's long-standing commitment to the health and well-being of the museum field, as well as to MANY, is deeply appreciated.

Anne W. Ackerson
Director
The Museum Association of New York

Connecting the Dots

Say you come across a collection of paintings languishing at your local library.

Next you discover that this artist, a nationally-known illustrator, lived in a long-neglected house located down the street. The house is for sale. You bring friends to see the paintings. In a few quick meetings you have morphed from a curious library user to someone with a mission, and in a zero-to-60-seconds scenario, your group is master-minding the purchase of the artist's home. Next stop: You start the legal ball rolling to become a museum, convinced that with some work, this artist's home will become a tourist magnet for your community. You believe your idea is unique, and you are lucky enough to have a ready-made collection—not to mention the historic house--to support it. What you lack is community support, but you know that will come once you have purchased the house.

Is this a familiar scenario?

The ideas, collections, and community support in this scenario are all components in the birth of a healthy museum or history organization. Each one reinforces the other. And they are what the public, government regulators, funders, and the museum profession expect of all museums, historical societies and heritage sites.

This guide will help you connect the dots and understand how one component builds on another. We strongly suggest that you work through this guide before beginning the process of incorporation. Why? Because you'll be in a much stronger start-up position having articulated your niche, your audience and your support *before* bringing a formal organization into being and opening the legal equivalent of Pandora's box, which will take on a life of its own and require care and feeding to be viable.

First, Explore Your Options:

Real Life Advice:

- *“When I’m asked my best advice by individuals and/or communities thinking of starting a museum, the first thing I ask is whether they have considered other options for memorializing the event or person they wish to honor. Taking an historic house museum as an example, energizing a community to save a historic house as an icon of community pride is the easy work. Maintaining that energy over time when the roof leaks or the collections need repair—not so much. But saving an important historic structure can be done even without making it into a museum. There are many examples of how historic structures are repurposed and interpreted to the public. Do your homework first to avoid yet another museum that struggles for adequate funding, necessary leadership, and well-maintained collections.”*
–Terry Davis, President & CEO, American Association for State and Local History
- *“When looking at redundancy - if there is something similar nearby, don’t compete for audiences, work together if you can. If you don’t work together, both organizations would lose out.”*
–Tanya Tobias-Tomis, Education Director, Saratoga Arts
- *“Does your great idea need to be a museum or can it be a plaque or a historical marker?”*
–Pamela Green, Executive Director, Weeksville Heritage Center, Brooklyn, NY

- *“Make sure that you have a unique experience to share with your community and tourism market. Maybe what you have could complement another experience in the community and you should look to partner with that organization versus establishing your own stand-alone experience. As an example, you may want to start a weather museum and there is a local science center/ science museum in the community. This is an ideal opportunity for a partnership. In this partnership, you could possibly save overhead expenditures. These savings could come from rent, personnel, back office support, etc.”*
 – Mark Mortenson, President & CEO, Buffalo Museum of Science

Perhaps acquiring a property and caring for a collection, keeping it open to the public on a regular schedule, AND producing programming is more than you are able to take on at the moment. There are other options, many of which are completely viable, just as important as owning original materials, and fun. What can you do that makes the best use of your resources without breaking the bank and burning you out?

How about....

- becoming the programming committee for an already-established museum or heritage organization. You get to do all the fun stuff of research, creation and information sharing without the care and feeding of a legally incorporated organization to worry about.
- focusing your efforts on documenting your community and its cultural traditions through oral histories, photographs and video, journaling and art creation. Give these to a local/regional repository for the public to access. Can your idea have a life online? The Web is an affordable place to showcase documentation projects and nurture conversations.
- organizing public events like history fairs or cultural festivals. You'll focus the public's attention on the importance of art, history, science or culture and, perhaps, encourage its support of already existing institutions and programs.
- becoming vocal advocates for heritage preservation, museum and school collaborations, and funding for your local/regional museums. Now more than ever arts/culture/heritage organizations needs cheerleaders who are ready and willing to press the case for support.

- volunteering at already-established museums and heritage organizations. You can do a lot to help these organizations stay strong or get healthy.
- fundraising for already-established museums and heritage organizations or for a collection housed at your local library.

If after looking at partnerships and cooperative ventures, you still believe becoming a museum is the path for you, stop and take a breath. It's time to do some research, to scour the landscape, and to do some soul-searching.

Tip: This is not about you. This is about creating long-term value for your community.

Real Life Advice:

- *“Starting a museum is an exciting enterprise. It is important to marry the enthusiasm with good practices, a clear mission that focuses the efforts on your museum’s purpose and goals, and a strategic plan that will help you keep on track. It is essential to identify a Board that will recognize that their main roles are to identify policy, partner with staff in the strategic planning process, and to serve as fiduciary trustees and donor leaders.”*

–Ruth K. Abrahams, Ph.D., Executive Director, Gomez Foundation for Mill House, NYC

Your research should begin with an understanding that your idea for a museum doesn't exist in a vacuum. For starters, there are more than 1,400 museums and heritage organizations in New York State. They range from the internationally-known to strong regional museums and robust local history organizations. And every year that number grows.

Not from New York? The same advice applies: Know how many museums and heritage organizations already exist in your universe, who they serve, and what they do. Visit them. Contact your state's department of state, office of cultural affairs or major state funder of museums and heritage organizations to find out how many museum start-ups your state sees annually.

Tip: Take the time to do some research about how various museums/heritage organizations in your region operate. You'll want to know how their boards are set up, where their funding comes from and how they spend it, the scope of their programming and who does it, and what their biggest challenges are. You can create a GuideStar account for free to research the financial background of non-profits in your community or region. Go to www.guidestar.org.

New York's State Education Department grants approximately 25 provisional charters to aspiring museums or heritage organizations annually. These provisional charters—good for five years—provide a secure legal structure for new organizations, along with time for start-ups to put down roots. Five years seems generous, but it takes some organizations far longer to establish a solid, fully functioning board of trustees, a sound financial base, and meaningful programming – activities that can sometimes take decades to accomplish well.

In other states, incorporation is usually granted through the Department of State in what is a relatively simple and straightforward process.

Real Life Advice:

- *“The easiest part of starting a museum/historical society is ‘Starting it’.... The hard part is keeping it going after the original people are gone!”*

–Bill Sauers, Greece (NY) Historical Society

Don't be fooled. This is a complex process that leaves some museums or heritage organizations faced with formal dissolution or consolidation every year. Many more lie dormant with buildings and collections in peril. As someone thinking about starting a museum or heritage organization, you should understand that there are potential long-term organizational risks if you fail to plan thoroughly before opening your doors.

Tip: Once you apply for incorporation, you have started a legal process that requires dissolution or consolidation to stop. So, it's best to have all your ducks in a row before you begin. Read all of this guide, answer all of the questions and write your business plan BEFORE applying for incorporation!

Creating a museum is not easy, but neither is it as complex as sending a rocket to the moon. In fact, beginning a museum or historical organization is more like raising a child. There are experiences all parents encounter, but in the end every situation is different. This guide is designed to give those interested in starting a museum or heritage organization a checklist for planning and preparation that builds strong, healthy organizations.

A Word about New York State Education Department Charters for Museums and Heritage Organizations

For more information about provisional and absolute charters, see the sidebars on pages 29-30.

In addition to the **provisional charter**, the New York State Education Department also extends **Certificates of Incorporation** to groups wishing to form exploratory committees to determine whether or not they wish to start a museum or heritage organization.

To learn more, visit the chartering section of the New York State Museum website: <http://www.nysm.nysed.gov/charter/>

Once you've reviewed the online information, you can contact the chartering office by phone or email with your questions.

*Chartering Program
New York State Museum
New York State Education Department
Room 3097, Cultural Education Center
Albany NY 12230
Phone: (518) 473-3131
FAX: (518) 473-8496*

Real Life Advice:

- *“Every great museum adventure starts with a dream. Every successful venture starts with some very clear and definite idea of what you want to accomplish. Keep your constituents in mind at all times. The most successful museums are measured in the number of lives they impact, the number of young minds they inspire and not necessarily by the number or quality of things they own. A museum with no visitors is NOT a museum...it’s just a warehouse.*

Take heart in knowing you have support in this adventure. When starting a new museum project, remember there are many, many others out there who have traveled the same path and they are willing to share. Build on their experiences to make your dream for serving your community come true.”

–Bart A. Roselli, Director of Education & Interpretation, Seneca Park Zoo Society, Rochester, NY