

As a service to our clients and others, we provide conference presentations, occasional research reports and project reviews on topics of interest which highlight various trends and aspects of our practice. We provide consulting services to clients in the areas of project and plan concept development, attendance potential, business planning, feasibility evaluation, implementation, and economic impacts analysis. We specialize in the fields of museums, aquariums and zoos; other visitor attractions and facilities; tourism and resort development; real estate and urban development; and community planning. We welcome your comments.

MUSEUM PROJECT DEVELOPMENT: PLANNING FOR LONG-TERM SUCCESS

Planning for a new and expanded museum, science center, zoo, aquarium, or other visitor venue is something that most Boards and staff do only once or twice in a career. It is one thing to conceive a new or expanded museum building project and a very different thing to operate it. The skill sets and approach to developing a new product and operating an existing museum are not the same. At the most basic level a new or expanded museum project has three basic elements as illustrated in **Figure 1**.

To ensure that your project is positioned for long-term success in delivering its mission, it is important that the project team selected to develop the museum plan contain expertise in all three areas, as each element requires a unique skill set and expertise. All too often, project planning proceeds with expertise in building and content planning #1 and #2 without having outside expertise in operational business planning #3. As a result the optimum balance of these project elements is not achieved resulting in wasted time and money, from facility redesigns or concept changes driven by project economics late in the process, or a facility that is not fully successful.

ConsultEcon, Inc. staff have worked on over 600 projects. From this experience a number of topics related to the early project planning process have emerged:

- ◆ **Project Funding vs. Ongoing Operations** – For a founding board or project group, the most tangible aspect of a new museum project is

Figure 1
Museum Project Planning Elements



1. **Building or Facility Plan** – an architectural and landscape plan for the physical structure and site that outlines the size and scale of the project, the aesthetic, a program of spaces with square foot allocations and a preliminary total development cost.
2. **Content or Program Plan** – an exhibit and education program plan that details the concepts to be covered by the new organization, the type of experiences offered, target audiences and the collections that will support the programs and exhibits.
3. **Business or Operating Plan** – a plan for operating the new building and organization that includes attendance, staffing, expense and revenue projections, pre-opening budgets and planning, and fundraising planning.

often the physical facility – its architectural design, concept and execution. Further, much energy in the early stages of planning focuses on the building and fundraising for “bricks and mortar”. The physical building however is a shell or place for exhibits and an organization with people, programs and services to carry out its important mission. And once the facility is built, it must be operated. Very often the ongoing operating plan is left to the last minute or overlooked, while the bulk of energy is focused on “the building”. Planning for “the building,” “exhibits,” and “operations” is equally important and should be completed simultaneously.

- ◆ **The Project Team** – Selecting a project team of consultants and planners that have experience in all three of the basic planning elements (architecture, content and business planning) will ensure that the project has the greatest opportunities for success. Often, only one or two of the three planning elements are engaged initially. Projects stand a greater chance of success if the team includes all three elements from project inception.
- ◆ **Long-term Financial Sustainability** – museums provide important public services, yet the funding climate for these important organizations is becoming more and more

competitive and challenging. The topic of financial sustainability should be introduced into the planning process from project inception, with as much discussion dedicated to endowments, ongoing fundraising for operations and earned revenue opportunities as architecture and exhibits.

- ◆ **The Project Benefactors** – It is very rare to have a project benefactor or a small group who underwrite the majority of the cost of a museum project. New museum projects that have strong benefactors are even more likely to overlook the importance of business/operational planning. However, donors/benefactors increasingly want to ensure that their investment is a good one and that the museum has a plan that will ensure long-term sustainability. It is thus the responsibility of the founding group to their benefactors and future donors to engage in appropriate long-term business planning.
- ◆ **Board Expertise vs. Outside Consultants** – we often hear that “we have business people” on the board and thus do not need to hire an outside consultant for developing the business plan. Just as designing a museum requires a specialized architect, developing an operating plan for a museum is a specialized skill requiring experience in museum financial planning.

ConsultEcon, Inc. provides services to clients in the areas of project and plan concept development, strategic planning, evaluation and implementation in the fields of Museums, Zoos, Aquariums, and Visitor Attractions, and Travel and Tourism.

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