Using Business Tools to Solve Collections Management Problems

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The Cleveland Museum of Art
01

Background
CMA Building Project: 2005-2013
Additional Space

- **Total Museum Floor Space**: 592,500sf, +51%
- **Total Gallery Space**: 133,500sf, +33%
- **Special Exhibition**: 20,659sf, +26%
- **Transformer Station**: 3,500sf, +100%
Activation Strategies

1. Permanent Collection Gallery Rotations
2. Outgoing Loans
03 Complete Gallery Reinstallations

04 Featured Loans
Oh, you crazy!
02 Approach
Analysis Goals

- Established deadlines
- Standardized checklists
- Clearly defined roles & responsibilities
- Key process benchmarks
Challenges
55% of companies have siloed teams

Only 1 out of 4 senior executives describe their organizations as effective at sharing knowledge.

86% of corporate executives, employees, and educators cite lack of collaboration or ineffective communication for workplace failures.

Source: Bloomfire
“Silos—and the turf wars they enable—devastate organizations. They waste resources, kill productivity, and jeopardize the achievement of goals.”
—Patrick Lencioni, *Silos, Politics, and Turf Wars*
Entrenched Mindset

3 out of 5 companies say the solution to reaching their goals is collaborating more across functions.

Collaboration and process tools can improve productivity by 20–30%.

94% of organizations say agility and collaboration are essential to their success.

Source: Bloomfire
Project Timeline

1. Rotations Committee Formed
   - aug 2016

2. Rotations Defined & Project Schedule Outlined
   - dec 2016
Project Timeline

1. Rotations Committee Formed
   - aug 2016

2. Analysis & Documentation Complete
   - dec 2017

3. Process Rollout
   - mar 2018

4. Introduction Meeting
   - feb 2018

5. Rotations Defined & Project Schedule Outlined
   - dec 2016
Analysis & Documentation
Responsible, Accountable, Consulted, Informed
“I don’t know where I fit in the process”

“Things are always slipping through the cracks”

“Whose responsibility is it?”

“When was that supposed to happen?”

“Who has the authority to approve this?”

“I thought they were taking care of that (no one took care of that)”
Why RACI?

- Role Self-Expectation
- Role External Expectation
- Actual Role
Step 1 – Identify Project Roles

<table>
<thead>
<tr>
<th>Project Deliverable/Activity</th>
<th>Owning Dept.</th>
<th>Curatorial</th>
<th>Coll Mgmt.</th>
<th>Design/Production</th>
<th>Exhibitions</th>
<th>Cons.</th>
<th>Ed.</th>
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</thead>
<tbody>
<tr>
<td>Develop rotation concept/plan</td>
<td>Curatorial</td>
<td>A</td>
<td>R</td>
<td>C</td>
<td>I</td>
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</table>
### Step 2: Identify Project Tasks Or Deliverables

#### Permanent Collections - Gallery Rotations Matrix

<table>
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<tr>
<th>Project Deliverable/Activity</th>
<th>Owning Dept.</th>
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<th>Chief Curator</th>
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<tr>
<td>Complete rotation checklist template. Send to Exhibitions/Collections Management. Enter rotation into Athena.</td>
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**Key:**
- **Activity** - Process Step
- **R** = Responsible (owns the deliverable/activity)
- **A** = Accountable (to whom R is Accountable, who must sign off/approve on work before it is implemented)
- **C** = Consulted/Contributor (has information necessary to complete the work)
- **I** = Informed (to be informed: must be notified of results but need not be consulted)
### Step 3: Assign The RACI To Each Role And Task

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Process Workflow
Phase 1 - Concept Development

1. Develop Rotation Concept/Plan
2. Rotation Category 4?
   - Yes → Complete Rotation Checklist Template
   - No → Rotation Category 3?
3. Rotation Category 3?
   - Yes → Complete Rotation Checklist Template
   - No → Rotation not feasible
4. Rotation Approved?
   - Yes → Complete Rotation Checklist Template
   - No → Rotation not feasible
Phase 2 – Object Review

Enter rotation into Athena

Distribute rotation checklist & post to project plan room

Create conservation exam request

Conservation Review of Proposed Objects

Select alternate object(s)

All objects approved for rotation?

Treatment required?

Create Athena conservation treatment requests
Phase 3 – Implementation

Create Athena mount request

Mount Meeting

Yes

Design Meeting

To include: Design, Conservation, Collections Management & Exhibitions

Mockup needed?

Yes

Notify security of new cases needing alarms & installation schedule

Create rotation floor plan

Create Athena installation/deinstallation/gallery view requests

New case required?

Yes

Create Athena environmental materials request

Mockup

Yes

Create Athena photo requests

Final Checklist Approved by Chief Curator

Yes

Didactic Text to Interpretation & Editorial

Create Athena mount request
03
Outcome
Deliverables

01 RACI
02 Process Chart
03 Checklist Template
04 Yearly Rotation Calendar
05 Project Plan Rooms
Results

- More effective scheduling
- Longer lead time for planning
- Consistency
- Clearly defined roles
- Reduce last-minute changes/errors
04

What We Learned
Living Process

- Added process steps
- Adjusted responsibilities
- Added tasks
- Modified checklist template & schedule
Buy-in is essential...and challenging...and ongoing.....
Thank You

Jennifer Cicero
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