New Normal Committee

Final Report and Committee Findings

September 4, 2020

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Executive Summary

Prior to COVID-19, the focus of the Smithsonian has been primarily on exhibiting, conserving, and providing access to our rich and deep collections and producing world-class research. Alongside these long-standing strengths, new emphases had already begun to emerge through Secretary Lonnie Bunch's guidance and other Smithsonian-wide initiatives. These initiatives include partnerships on a national scale in formal education, a pivot to more digital content with open access, and engaging as an institution with the big questions facing society today, as we do, for example, through the American Women's History Initiative. The COVID-19 crisis has only underlined the importance of these new initiatives and has presented the Smithsonian with an imperative and an opportunity: How do we learn from the crisis, change to adapt to the New Normal, and emerge as a better organization?

The New Normal involves more just COVID-19 and racism, the dual pandemics affecting the United States. It also must reconcile a nationwide trend of declining museum attendance; a new, digital-ready generation; an educational system that underutilizes Smithsonian content; finances that rely too heavily on federal funding and revenue earned from in-person visitation; and an employment system that struggles to value and develop the talent on which we depend and fails to support many underrepresented groups. The New Normal requires a more nimble, effective, and entrepreneurial organization that relies on data for decision-making, and a new focus on audience and education that requires a renewed emphasis on digital resources. It necessitates an increased emphasis on fundraising and revenue earned through Smithsonian Enterprises (SE). It demands raising recognition of the Smithsonian Brand and using it in a manner appropriate to its enormous, although underappreciated, value. It requires a modern, progressive approach to recruiting, developing, and retaining our people, and developing an inclusive and diverse workplace culture. All this is keeping with our mission: The Smithsonian needs to extend the diffusion of knowledge beyond the institution's physical walls through a better understanding of its audience, elevate its critical role in education by having the courage and sophistication to address potentially polarizing topics, and create a workplace culture that can support this broader vision.

The recommendations of the committee are based on insights from a community-wide survey, focus group interviews, and discussions with a wide range of external speakers. They align with the Secretary's Framework for Guidance in implementing the One Smithsonian Strategic Plan[1]:

Build a Nimble and Effective Core

1. Financial Resilience
    a. Expand mass market philanthropic opportunities across the Smithsonian
    b. Strengthen and integrate membership
    c. Reimagine special events and public programs to challenge the notion that everything online and onsite must always be free
    d. Embrace ticketing as a strategic platform
    e. Integrate the e-commerce experience
    f. Create a Business Development and Brand Risk Leadership Team
    g. Leverage the benefits of the Smithsonian's trust status

[1] The New Normal Committee framed their recommendations based upon an advanced draft of the Secretary's Framework for Guidance to avoid creating competing frameworks and/or objectives. The Framework of Guidance may continue to evolve after September 2020 and the submission of this report.

2. Create a Solid Framework for Employee Professional Development
    a. Develop recruitment, onboarding, and retention programs for a One Smithsonian
    b. Provide professional development through rotational assignments and other experiential opportunities
    c. Embrace flexible work practices with innovation
    d. Establish a plan to realize Diversity, Equity, Access, and Inclusion across the Smithsonian
    e. Sustain mindfulness and resiliency through training

Develop a Cohesive Smithsonian Experience through Innovation and Audience Strategy

1. Increase audience-centered, data-driven decision making
2. Establish a One Smithsonian Audience Experience Leadership Office
    a. Increase digital literacy across staff functions
    b. Develop best practices and approved toolsets for audience engagement
3. Improve digital connectivity with campus-wide hotspots
4. Experience digital beyond the walls of the Smithsonian

Be a Trusted Source on Important Contemporary Issues (Big Ideas)

1. Generate and select Big Ideas
2. Implement Big Ideas
3. Possible Big Ideas and their implementation
    a. Race in America
    b. Life on a Sustainable Planet
    c. America's Innovation Engine
    d. Healthy Communities

Serve as a Knowledge Partner to PreK-12 Education Systems Nationwide

1. Education as part of our DNA
2. Define a Common Understanding of Education and conduct an educational audience assessment
3. Form a pan-institutional working group for Education
4. Make Education an integral part of the Big Idea implementation
5. Consider modeling Education after the Office of Advancement

Taken together these recommendations are intended to help the Smithsonian build on its strengths, capitalize on the emerging initiatives, and thrive in the New Normal. To be successful, these goals need to be accompanied by a concerted program of cultural change so that the Smithsonian can make decisions in a timely and transparent way, take risks when required, and ultimately be more than the sum of its parts.

Introduction and Background

Mandate

Secretary Lonnie Bunch founded the New Normal Committee and the Reopening Task Force, led by Richard Wright, simultaneously towards the beginning of the COVID-19 outbreak. While these two groups worked in tandem, their mandates were distinct. Reopening focused on the necessary and immediate steps to ensure the safety of the staff and collections while preparing the Smithsonian to return to work. The New Normal Committee began our focus where Reopening ended, asking how the Smithsonian should function after returning to work, until a COVID-19 vaccine is widely available and beyond.

In the invitational email sent to New Normal Committee members on April 15, 2020, Secretary Bunch wrote:

> *As we deal with the primacy of these immediate matters, I want to make sure that we also think strategically about how the issues we are facing may impact what our operations will look like in the short and long terms once we return to full operation. Like almost every other organization around the world, we will see some profound effects on the way we work.*
>
> *We will not be the same Smithsonian.*

We will not be the same Smithsonian. The New Normal Committee has used this core message to guide meetings, directions, and guest speakers. In the immediacy without a vaccine, we cannot be the same Smithsonian. But we can be a better Smithsonian. In what areas do we strive to be more—an evolving institution rather than one that slides back into past habits and behaviors? Our recommendations offer unique, creative, and often daring solutions to problems that have long plagued us.

Methodology

Out of the inaugural meeting and with guidance from the Secretary and Deputy Secretary, the committee decided to structure itself into four subcommittees around subjects the Smithsonian most strongly needed to address. These were all areas expected to be heavily disrupted by the COVID-19 pandemic and its consequences, and key opportunities and challenges in the New Normal landscape:

1. Identifying the Smithsonian's role in challenging global topics in order to help with societal change
2. Improving audience engagement both digitally and onsite
3. Examining working practices for our staff
4. Increasing the Smithsonian's nimbleness and profitability

In addition to weekly committee meetings, the subcommittees met regularly to discuss specific recommendations and conduct their own research to support their recommendations.

The first six weeks were spent defining what we think is—and is not—the New Normal. From numerous articles, the committee identified nine foci (see Defining the New Normal below). The research and

these foci helped identify outside individuals and organizations who inspired the committee to think outside the box and push ourselves creatively. Along with other committee members, Chair Ellen Stofan and Deputy Chair Ian Owens regularly participated in the Director's Speaker Series and brought lessons learned and key takeaways back to the group. A full list of speakers can be found in the appendix.

We purposefully looked internally and externally for inspiration and research to inform our recommendations. In addition to the guest speakers, the New Normal Committee worked with SOAR to create a staff survey focusing on employees' attitudes and thoughts around COVID-19 fears, areas for improvement, and staff recommendations regarding big ideas and revenue generation. The Smithsonian community fully engaged with the survey, with a response rate over 72 percent and 700 people volunteering to sit in discussion groups and interviews. We also brought together a series of discussion groups to conduct deeper dives into key areas of concern or interest and provide for longer discussions with key players. In total, the committee conducted thirteen discussion groups, met with more than thirty unit directors and three Under Secretaries, and synthesized lists of the remaining volunteers, which can be used by future implementation committees and working groups.

Key findings from the survey and discussion groups include:

- The need to coordinate our digital efforts around a cohesive strategy that results in effectively meeting the interests and needs of diverse audiences while having real impact
- The desire to change our organizational culture and processes to make the Smithsonian nimbler and more flexible
- An emphasis that the Smithsonian must undertake internal work in order to be leaders externally in global conversations
- Recognition of the need for creative ways to generate revenue through philanthropy and other means while staying true to our role as a public trust

These findings and the feedback from staff across the Smithsonian helped the committee further focus its recommendations, refine language, and test the viability of its suggestions.

The New Normal Committee is strictly advisory. The views and recommendations in this report are our thoughts and hopes for how the Smithsonian can thrive in the New Normal. The recommendations, while based in research and the institution's strong potential, were developed in under five months and will require unparalleled commitment from all levels of the Smithsonian to implement. The committee also did not fully investigate the financial impact of these recommendations. The challenges facing the Smithsonian now are numerous, and the committee was required to focus on the recommendations we felt most positively impacted the Smithsonian as a whole. As recommendations are greenlit, more research, staff input, pilot programs, and funding will be required.

Defining the New Normal

The committee set the timeframe of the New Normal to encompass Phase 3 (partial return of staff and reopening to the public pre-vaccine), Phase 4 (full return and reopening post-vaccine), and beyond. We understand that the world has changed radically since March 2020 and that the past must be used with caution to predict or dictate future behaviors.

What we think we know in general about the New Normal[2]

- **Facing inequities:** The racial, economic, and political divisions in society have been highlighted and exacerbated, specifically around racial inequities and systemic racism.
- **Adaptation as survival:** Businesses and institutions need to adapt—and adapt quickly—to change their business plans and products in order to meet restrictions, fill demands, and survive. Offerings may not survive the transition, and there will be a need to reprioritize.
- **Digital dominance:** With everyone living online through the pandemic, now more than ever there is a digital imperative to reach a broader audience by creating digital-first and digital-unique experiences.
- **New ways of working:** Businesses will need to change how they work, through telework and by building more nimble and adaptable systems.
- **Safety first:** People will likely travel less, go to crowded venues less, and touch things less over the next two years until a vaccine is widely available.
- **Rethink revenue:** "Old" revenue (fundraising through large social events, onsite sales, etc.) may take years to recover. Institutions must pivot to engage with donors and customers virtually and in new ways that will test organizational boundaries.
- **Trusted source:** COVID-19 has highlighted the need for trusted sources of scientific information. Trusted brands, however, are now expected to do more than communicate, but must also be seen creating societal change through tangible action.

What this means for the Smithsonian's New Normal

- **One Smithsonian:** Act as a cohesive organization rather than creating disconnected and disparate responses.
- **Nimbleness:** Focus on nimbleness and boldness in thought and operations that allows the Smithsonian to adapt quickly to the changing environment.
- **Understanding audiences:** Know our audiences and make strategic, data-driven decisions in everything the Smithsonian undertakes.
- **Diversity and inclusiveness:** Focus on the role of the Smithsonian in addressing racial, gender, sexual orientation, and other identity-based divisions through tangible actions and activities.
- **Expertise:** Leverage the Smithsonian's science expertise and trusted brand.
- **Education:** Expand the Smithsonian's public service role through education by increasing high-value digital and onsite content while changing the role of education within the Institution.
- **Digital:** Resource, build, and leverage digital-first content.
- **Workplace culture:** Create the most flexible workplace possible.
- **Financial resilience:** Prioritize philanthropy and new revenue streams to allow us to invest in what we do best.

Acknowledging barriers to change

The committee quickly recognized the need to acknowledge internal barriers to change in order to move into the development recommendations. Equally important is identifying possible solutions to those barriers, including:

- **Culture:** Foster a culture that can live with discomfort and uncertainty and can fully leverage the opportunities afforded to the Smithsonian as a trust instrumentality. Understand that comfort in "how it's always been done" is an equally high barrier to necessary change.

[2] Supporting articles can be found in Appendix 1, Bibliography.

- **Initiatives:** Approach new major initiatives by first grounding them in the why, who, and future state of the institution, rather than allowing a thousand flowers to bloom with little likelihood of cumulative impact.
- **People:** Transition from a stalled Human Resources model to a modernized Human Capital Management model.
- **Audience:** Become customer-centric and use audience data to drive decisions; implement ways to effectively and efficiently gather, analyze, and integrate data.
- **Brand:** Elevate the Smithsonian Brand to be a strategic driver that helps distinguish our products and experiences in the marketplace.
- **Revenue:** Diversify our revenue streams by prioritizing philanthropy, revenue generation, and business/partnership development in the decision-making process.

The committee used this definition and its application to the Smithsonian to develop a set of recommendations, aligned under the Secretary's Framework for Guidance. Each recommendation has a suggested owner or group of owners, and most have suggested actions that can occur after a working group or implementation team is launched. These plans, outlined below, will give confidence to staff that our recommendations are reachable and can be undertaken immediately.

Smithsonian Culture

The New Normal Committee heard on many fronts that the Smithsonian's culture is at the heart of our inability to become a more strategic, nimble, and effective organization. While the New Normal recommendations on the following pages are not listed in order of priority, the committee wanted to highlight first the importance of tackling cultural change as, to quote Peter Drucker, "Culture eats strategy for breakfast."

Not dissimilar to issues generally found in large and complex organizations, issues related to organizational culture at the Smithsonian seem to center around:

- Cumbersome, slow, overly consultative decision-making processes that ultimately lack clarity on who the decisionmakers actually are
- An adherence to a hierarchical and antiquated model where certain functions (research, education, audience, and operations) are not perceived to be of equal value
- Risk aversion, often manifested in not taking advantage of the institution's quasi-federal status and by an overreliance on process and rules
- Central functions that do not always work or communicate well with units or each other
- A habit of saying "no" rather than "yes, if . . ."
- Failure to recognize the need for revenue generation (philanthropic and earned) to support and sustain critical functions

Our research suggests that organizational culture change is hard, takes a long-term commitment, and is best achieved when aspects of existing culture can be emphasized and enhanced. The Smithsonian needs to be honest in assessing its organizational culture if it is going to celebrate its best traits and cultivate sustainable change in other areas.

Some initial ways of instigating an organizational culture shift include:

- Identify organizational cultural change as a key priority for the Smithsonian and pursue a single signature project in a key area.
- Find a few areas that could be early wins by determining where the logjams are and loosening those jams.
- Expand One Smithsonian organizational culture. Expand the use of multidisciplinary and cross-unit teams. Use existing cross-unit programs, such as the Leadership Development Program, to pilot Smithsonian-wide efforts at a larger scale.
- Investigate working with a consultant knowledgeable in organizational change. A consultant could help the Smithsonian focus on which aspects of our organizational culture can best be enhanced and how to change those aspects that are holding us back.

Build a Nimble and Effective Core

In the New Normal, organizations that thrive will be nimble and effective. Nimble and effective organizations leverage technology, support internal innovation, and form creative alliances. Nimble organizations use multidisciplinary teams, encourage experimentation, and tend to be less process-based and more values-based. For the Smithsonian, becoming nimbler and more effective includes how we develop more flexible and profitable operations, recruit and support our workforce, drive innovation, and implement streamlined decision making.

Financial Resilience

To improve its financial resilience, the Smithsonian needs to pursue opportunities both to grow existing revenue streams and to generate new ones, while at the same time boosting our reach, relevance, and impact. The Smithsonian units have developed a "dual class" relationship with Smithsonian Enterprises: most units must utilize SE, and thus pay Castle revenue share and SE expenses, and others do not. This approach should be re-evaluated, with a new set of processes to ensure a collaborative relationship, and a fairer shared responsibility toward contributing to the Central Trust. Additionally, the Smithsonian must become more efficient on the expense side by leveraging efforts where we have historically been siloed. Some of this activity is already under way, such as the comprehensive Smithsonian-wide fundraising campaign launching in two years or the ongoing business model improvements within Smithsonian Enterprises. These changes, however, will not reach their fullest potential without some systemic culture changes within the Smithsonian.

1. Expand Mass Market Philanthropic Opportunities across the Smithsonian

Recommended owners: OA (lead); Unit Advancement, Membership, and Communications representatives; SE; OCEA; OCIO; Privacy Office; OGC; OCON

Overview: By strengthening our need messaging and creating new broad-based, lower-level/higher-volume giving opportunities through social media, stores, magazines, websites, and ticketing as well as through existing and new programs, such as adopt-an-artifact, we will reach a wider audience and raise more critical unrestricted revenue for both central and unit programs. This will create opportunities to strengthen long-term, sustainable, and mass-market giving across the Smithsonian; promote entry level membership categories; and communicate to the public that the Smithsonian needs their support. As we head into a second capital campaign by the end of CY20, the time to mobilize, educate, and test in a transparent way is now.

2. Strengthen and Integrate Membership

Recommended owners: OA & SE (leads); OUSE; OCEA; OCIO; Privacy Office

Overview: The Smithsonian needs to build and maximize its large, diverse central member base with an approach that 1) leans into its unique structure and allows for many member programs within the

Smithsonian family and 2) coordinates these programs in a way that provides the clearest and most member-centric approach. The more we know about our members across the Smithsonian, the better prepared we will be to develop strategies to target and engage people effectively. As a pilot, OA Friends and Smithsonian Enterprises membership groups are testing a potential "upsell or cross-sell" program for 25,000(+) membership subscribers (*Smithsonian Magazine* to Friends). Results from this test will help inform other pilots and deepen partnership opportunities.

3. Reimagine Special Events and Public Programs to Challenge the Notion that Everything Online and Onsite Must Always Be Free

Recommended owners: Under Secretaries for Museums & Culture and Education (leads); OSEP; Unit Special Events representatives; Unit Programming/Audience Engagement representatives; SA; SE; OA; OCEA; OGC; OPMB; OUSE

Overview: Smithsonian should never waiver in its commitment to democratize education and provide free access to its collections. However, the New Normal Committee identified many areas where a fee- or donation-based structure could be considered. By expanding the definition of Special Events, we can envision new opportunities to leverage Smithsonian spaces and develop digital Special Events. Similarly, we believe we can develop high-quality, paid programming opportunities (fee-based and/or donations) online and onsite that will help defray the cost to create and maintain these initiatives and provide a more sustainable funding pipeline into the future. Opportunities such as donate-as-you-wish programming, a Smithsonian Speakers Bureau, and traveling exhibitions that charge an entrance fee are ideal areas for initial consideration. Going forward, with each new initiative we must include the "free, fee, or donation" evaluation upfront in the planning process. By building a broad coalition from across the Smithsonian, creating a clear set of guidelines, and launching a few pilots, the Smithsonian can responsibly test into this area.

4. Embrace Ticketing as a Strategic Platform

Recommended owners: Deputy Secretary (lead); Under Secretary of Administration; OCIO; SE; OA; Central digital leader; Unit IT representatives; Unit Audience Engagement representatives; OCEA; OVS

Overview: As part of the broader goal to embrace audience-centered, data-driven decisions, the Smithsonian should implement a free timed-ticketing system at all museums. This will allow for managed access to our buildings in the near future and longer term, and for enhanced engagement via visitor experiences, product sales and services, fundraising, and as a resource to gather customer data analytics.

By using timed tickets, we can ensure the safety of our visitors while providing excellent customer service through fee-based customization options, such as advanced purchase of lunch from a café, personal tours led by docents, and early entry into the museums. An option to donate through the ticketing platform could be made available, which would provide another avenue for mass-market fundraising. Important components of implementation would include an evaluation of both the opportunities (consumer data, visitor experience) and challenges (data governance, privacy) of a comprehensive system. This should include a financial analysis of the cost to implement and maintain

ticketing versus the value in terms of customer enrichment, donor cultivation, and revenue generation. Also included should be a recommendation on where the oversite of this system should live long-term.

5. Integrate the E-Commerce Experience

Recommended owners: SE (lead); Under Secretary of Administration; Unit representatives

Overview: The Smithsonian will create a truly digital-first shopping experience that can offer the best-of-the-best in terms of Smithsonian- and museum-related products. By delivering a broader selection of product offerings and an enhanced online shopping experience through an upgraded and responsive platform, we can provide additional customer touchpoints for highly engaged visitors and shoppers, as well as an integrated customer experience between online and in-person stores, memberships, and other SE businesses. Successfully moving to a new, flexible platform will be a critical foundational next step.

6. Create a Business Development and Brand Risk Leadership Team

Recommended owners: Deputy Secretary and Assistant Secretary for Communications & External Affairs and Chief Marketing Officer (leads); OGC; OA; SE; Under Secretaries

Overview: Develop a senior-level committee that can access strategic opportunities for brand fit and/or risk, help prioritize major Smithsonian initiatives, and provide guidance to help Smithsonian be more responsive to innovative opportunities, potential partnerships, and business opportunities. The committee will interface across units and with OPA to ensure collaboration, buy-in, feasibility, and timely implementation. The committee will submit recommendations to the Secretary for final approval.

7. Leverage the Benefits of the Smithsonian's Trust Status

Recommended owners: SI CFO (lead); OCON**;** OGC; Unit representatives; SE; OA; OPMB

Overview: Review Smithsonian policies and procedures to better understand what is permissible as a trust instrumentality as opposed to what the Smithsonian has adopted as a rule; understand where SDs are being overly interpreted; identify opportunities for the institution to operate more like a nonprofit than a federal entity; and introduce new strategies for bridging the two. The approach to risk needs to be a top-down decision. There are two pieces to this: One is operational – addressing overlapping, obsolete, or unnecessary policies and procedures – while the other is adjusting perceptions around acceptable brand risk.

Create a Solid Framework for Employee Professional Development

The New Normal Committee chose not to include recommendations for the current organizational structure and scope of the Office of Human Resources. Instead, the committee focused on how the Smithsonian could move towards a model of Human Capital Management. This updated organizational model would focus on the whole employee, with an emphasis on creating a diverse and valued workforce that has opportunities for cross-Smithsonian experiences, is underpinned by a strong wellness program, and will excel in a New Normal environment serving global audiences. The Smithsonian in the New Normal must treat telework as an enduring change by formulating new guidelines, employee support, and supervisor training and by fostering strong organizational connections.

1. Develop Recruitment, Onboarding, and Retention Programs for One Smithsonian

Recommended owners: Director, Office of Human Resources (lead); Head of Diversity; OUSE

Overview: As a talent-based organization, the Smithsonian will need to compete with other employers to attract and retain a diverse pool of talent in the workforce of the future, which includes a growing number of professionals in the liquid workforce[3]. Also known as the gig workforce or employees of the gig economy, these professionals account for 35 percent of the U.S. workforce.[4] Individuals are transforming their skillsets and expectations to prepare for work environments that are diverse, inclusive, flexible, and innovative. They seek engagements that are multifaceted and tap their networks to prepare for the next opportunity, likely within a timespan ranging from two to five years.

If the liquid workforce seeks variety and engagements that focus on project-based work, the Smithsonian should use the incredible diversification model it already has to attract and retain these professionals. With 19 museums, 21 libraries, the National Zoo, numerous research centers, several education units and centers, and several product lines within Smithsonian Enterprises and the Smithsonian Channel, the Smithsonian should:

- Identify mechanisms to accelerate the recruitment in strategically important areas, using more robust pan-institutional advertisements and less administrative hurdles to attract the best and the brightest to work at the Smithsonian. For example, the classification process might be streamlined by generalizing position descriptions, job analysis, and rating plans at the central level, then accepting variations submitted by units for a web form
- Create an information exchange for units to share upcoming opportunities and talent seeking new opportunities
- Determine a process to expand the effort to recruit underrepresented populations and create a pipeline for future talent by focusing on the variety of career paths at the Smithsonian, not simply the concept of working at a museum or research center. Partners to help expand the effort may include the Smithsonian Latino Center's Youth Ambassador Program or existing Museum Studies programs at high schools like Duke Ellington School for the Arts.

[3] A liquid workforce is one that is made up of primarily of freelancers who are able to rapidly adapt and change based on the environment that they are in.
[4] *Forbes* article is linked in Appendix 1, Bibliography.

- Document training needs for managers to acknowledge and address biases when recruiting talent and to seek candidates with existing or potential skills in cognitive flexibility, digital literacy and computational thinking, judgment and decision-making, emotional and social intelligence, and creativity and innovation

The current orientation of new hires in a one-day process has resulted in very little knowledge of the organization and a lengthy time to integrate. To improve this, the organization should conduct a feasibility study to create quarterly- or semi-annual cohorts of new hires. Cohorts will generate inter-unit collaboration in support of One Smithsonian and participate in information exchanges and talks with leadership to learn about the Smithsonian; gain insight into career paths at various units; and establish relationships and possible mentorships with other staff, ranging from entry-level to senior management. The organization should consider a time range of six to nine months for the cohort-based orientation program.

The most comprehensive measure to improve retention is to understand the needs of current employees and develop an understanding of why recently departed employees sought new opportunities outside of the organization. With these findings, the next steps might include developing training for managers to build trust and facilitate open discussions of career goals for employees that may change or benefit from new opportunities.

In response to the recent pandemic, managers also need support with their ability to manage a remote workforce, including how to address obstacles in completing assigned work; meeting the different needs of auditory, kinesthetic, visual, and verbal learners when developing employees; and creating inclusive environments for telework and non-telework staff.

2. Provide Professional Development through Rotational Assignments and Other Experiential Opportunities

Recommended owners: Director, Office of Human Resources (lead); Head of Diversity; OUSE

Overview: Expand the Rotational Assignment Program (RAP) to realize One Smithsonian goals and improve the career and personal development of qualified Smithsonian staff, ranging from entry level to mid-career. Career development should continue to focus on strengthening skillsets while personal development will focus on the individual and necessary reflection to overcome personal and professional challenges. Cultural development may be a new area of focus but is deemed very necessary because each employee helps the organization to meet its critical goal to educate a global audience. SI's 2015-2016 survey revealed that approximately 20% of our visitors were from foreign countries. Nearly 40% of our visitors identified themselves as LatinX, African American, Asian, American Indian, and other. Assuming these metrics have increased over the last four years, employees must have a deeper knowledge of those whom we serve. RAP has been managed between Smithsonian Facilities and OPS since 2008. By expanding the program to other units and incorporating portions of the program model already developed for the Emerging Leadership Program or Palmer Leadership Development Program, staff can learn more about the Smithsonian and deepen the knowledge and skills of internal candidates, increasing retention and decreasing time to recruit, hire, onboard, and fill vacancies. Staff can expect to participate for up to 12 months, although some assignments may be shorter or longer. The benefit is

two-fold: to support professional development for the participants while fulfilling tangible needs at the units.

Also, internal recruitment motivates staff and builds trust. Retention enhances knowledge of Smithsonian culture, promotes leadership, and expands learning from one unit to another. After the first two years of expanding this pilot, the Smithsonian should expand the program to other units and consider partnerships with the Smithsonian Channel and external organizations, such as the National Geographic.

Because RAP has been successful for many years between Smithsonian Facilities and OPS, it is important to interview existing RAP coordinators to review current policy and document best practices and recommendations to highlight education and career development in order to avoid occupational crowding in various roles across the Smithsonian.

3. Embrace Flexible Work Practices with Innovation

Recommended owners: Director, Office of Human Resources (lead); Chief Technology Officer/Acting Director, IT Operations; Unit Directors

Overview: It is important for the Smithsonian to use the lessons learned during the pandemic to adopt telework policies, flexible work schedules, and collaborative scheduling tools for work performed onsite and in shared office spaces for the long term. This will allow the Smithsonian to build an infrastructure of processes and systems to support a growing remote workforce.

- Retain onsite work schedules and office spaces for operational functions, such as facilities, maintenance, security, and IT support, as well as public-facing functions; however, consider reducing the number of public open days from seven to six to allow supporting units an opportunity to telework at least one day each week.
- Implement a hybrid schedule of telework and onsite work.
- Allocate additional resources to provide staff with necessary equipment and internet bandwidth in their remote locations, including laptops, monitors, and mobile devices with hotspots. When employees in households with multiple occupants work remotely, the need for additional bandwidth is critical to their ability to join virtual meetings, access files on the network, and work without disruption due to the loss of connectivity.
- Continue investing in and promoting cloud-based tools like Smartsheet, JIRA, and Microsoft Teams, with a host of add-on modules, to offer employees collaborative calendars, project-based management tools, streamlined and automated filing systems and workflows to support recruitment, hiring, onboarding, procurement, invoicing, and services.

4. Establish a Plan to Realize Diversity, Equity, Access, and Inclusion across the Smithsonian

Recommended owner: Head of Diversity

Overview: The idea of working in an inclusive environment is common to everyone, because human nature desires the sense of belonging. The combination of diversity and inclusion, however, creates a complexity that often breeds resistance to change because tradition and familiarity, too, are part of human nature. To foster a work environment that is diverse and inclusive, the Smithsonian should consider the realities of its goals and current state to develop a pan-institutional plan.

The Smithsonian must do the hard work first to determine what a diverse and inclusive environment must look and feel like at the Smithsonian and depend of an external resource to support the gaps, following the concepts of intentional change theory.

- What is the current environment? How does the Smithsonian hire? Does the Smithsonian currently track and report on diversity hires at all levels in the organization?
- What do we want to achieve? Do we anticipate a specific percent representation by race and gender? Is it an even split, or are there other percent goals? Do the percent goals differ at various levels in the organization? Should the diverse make-up of the organization reflect our global audience?

The pan-institutional plan should not be made in a vacuum, but instead as a result of facilitated conversations that cross layers of diverse stakeholder groups, ranging from leadership to entry-level staff at both larger and smaller units. After goals are identified, achieving them must be driven through a top-down approach, with leadership and unit directors supporting and implementing the change, including a new leadership position as a central function and support staff at the unit level. Required skillset for the new leadership position should include the ability to express the needs at all levels in the organization effectively, plan for the necessary change, and garner support to capture approval and resources to implement change.

External resources will likely include additional trainings in having difficult conversations for every HR director, hiring manager, and supervisor at each unit, specifically related to diversity and inclusion, and evoking support with change and transition.

In order to sustain the momentum once this effort is underway, the pan-institutional plan should promote diversity within the organization as well as publicly through open reporting and recruitment. This change is not real until we say it aloud.

5. Sustain Mindfulness and Resiliency through Training

Recommended owner: Office of Health Services (lead)

Overview: The pandemic has placed enormous stressors on the Smithsonian and its employees, from dealing with issues around telework and remote schooling to the roles and concerns of essential employees on the front lines. This program would focus on the overall wellness of our employees and supplement the medical services provided by the Office of Health Services. It would also assist in the overall performance of employees by providing education and training in some of the core competencies that lead to increased success as employees, supervisors, and leaders. These competencies include, but are not limited to, resilience, emotional intelligence, team building, problem solving, and conflict management.

A key component of such a program would be training in resiliency and mindfulness mediation principles. Mindfulness is defined as paying close attention to what is happening in the moment; it is being present and not on autopilot. Resiliency is the capacity to recover from difficult life events. The difficulties of life manifest as behaviors in the workplace, good and bad. Because human nature often makes it a challenge to be mindful and resilient, we have an opportunity to instill compassion and empathy in Smithsonian employees and affiliated staff by providing support before a situation becomes a crisis. A mindfulness practice has the potential to reduce burnout, injuries, workplace errors, and even depression and other related issues.[5]

This program can include the eight-week Mindfulness Based Stress Reduction (MBSR) program developed by Dr. Jon Kabat-Zinn at the University of Massachusetts or a similar program. Additional online and in-person trainings may be used to equip staff members to respond more effectively to stress, pain, and illness and should be offered on an ongoing basis in conjunction with the established OHS Wellness program for physical well-being.

[5] *Harvard Business Review* articles are linked in Appendix 1, Bibliography.

Develop a Cohesive Smithsonian Experience through Innovation and Audience Strategy

The Smithsonian's capacity to understand and engage with audiences must increase to realize the Secretary's goal for a Virtual Smithsonian that is a vital resource for people everywhere. Currently there is no way to understand an audience member's journey across Smithsonian programs and functions—business, fundraising, education, and visitor services. Without this information, it is nearly impossible for us to measure the relevancy or success of new initiatives. As important, we miss the opportunity to engage more deeply with our current audience and likely provide a suboptimal visitor experience.

We need to understand our audiences—digital, onsite, and the hybrid where they intersect—to better serve them, as well as to attract, engage, and develop new and more diverse audiences across the Smithsonian.

To thrive in the New Normal, we must become a data-driven and audience-centric organization. Organizations can no longer rely on tradition for decision making. Relevant and timely data must be collected and used to drive success.

1. Increase Audience-Centered, Data-Driven Decision Making

Recommended owners: Deputy Secretary (lead) forms an Audience Data Working Group with representatives from OA, OCEA-OVS, OUSE, SE, and Units

Overview: In order to strengthen our global relevance, diversify our reach, and increase our impact on audiences we already serve, audience data analysis needs to be a core, strategic function of the Smithsonian. We must prioritize rigorous data collection and analysis in a universal Customer Relationship Management system (CRM)—or interconnected CRMs—across the Smithsonian's advancement, business, digital, education, and visitor services functions to drive strategic priorities. The Smithsonian should define metrics (KPIs) to evaluate engagement at multiple levels – i.e., skim, swim, dive. Insights from this analysis should drive the strategy for planning future digital and on-the-ground programming.

2. Establish One Smithsonian Digital Transformation Office

Recommended owners: Deputy Secretary (lead); Digital Steering Committee

Overview: In order to increase reach, relevancy, and impact in the virtual environment, we need to transform our organization and our culture to deliver impactful, innovative One Smithsonian experiences—digital, onsite, and hybrid—based on rigorous audience knowledge.

The leader of this office—a principal experience or transformation officer—should oversee organizational transformation to inject the audience perspective, agile processes, and innovation into multiple functions across the Smithsonian. The principal should report to a steering committee led by

Steve Case, Chair of the Board of Regents, in order to maximize fundraising and strategic tech partnerships. The earlier work of this office will likely focus heavily on auditing and improving digital capacity across the organization until the Smithsonian is a more digitally mature organization. The Digital Transformation Office will need authority, a strong team, and resources so it can orchestrate a cohesive Smithsonian experience. The Smithsonian's upcoming 175th anniversary or America's 250th should be used to demonstrate One Smithsonian as a digital-first, innovative brand.

Possible Areas of Oversight

- Audience Experience and Engagement
    - Deploy CRM across Smithsonian functions: business, education, fundraising, and visitor services.
    - Develop One Smithsonian strategy and initiatives using audience data.
- Digital Strategy
    - Establish collaborative partnerships with innovative external entities, ensuring the most up-to-date technology for operations and public-facing technology.
    - Develop and orchestrate digital strategy for Big Ideas across all units.
- Digital Best Practices and Toolsets
    - Audit public-facing digital platforms onsite and online to ensure accessibility and usability and create specifications for new platforms to increase reach and relevance.
- Digital Learning and Development
    - Assess digital capabilities and capacity across the Smithsonian, including staffing levels, skills, roles, and responsibilities, and develop ongoing education programs for staff.
    - Develop a strategy to improve and advance the digital literacy and resources of the Smithsonian workforce.
- Inclusive Design
    - Develop standards and best practices for ADA Accessibility of digital platforms.
    - Develop standards and best practices for equity in representation of diverse populations on Smithsonian digital platforms.
    - Develop standards and best practices for foreign language access.
- Infrastructure Support and Integration
    - In partnership with OCIO, create an integrated support model capable of facilitating digital transformation and activity across all units. Address current operational obstacles, such as privacy, procurement, and technical review.
- Collections Management and Capacity Building
    - Organize the Smithsonian's digitization and accessibility priorities to align with strategic priorities. Convene conversations with directors and design a workflow that makes the digitization of content a transparent and collaborative process.

3. Improve Digital Connectivity with Campus-Wide Hotspots

Recommended owners: Head of Digital Transformation (lead); IT Operations Manager, National Zoological Park; Director of Operations, NMAAHC; Chief Experience Officer, Cooper Hewitt; Chief Technology Officer; DC Public Schools

Overview: Expand outdoor Wi-Fi to create an atmosphere of education access for everyone. To reinforce its position as a global leader of museums, education organizations, and research organizations in the Digital Age, the Smithsonian needs to implement a secure wireless platform to provide outdoor, high-speed Wi-Fi at its museums, centers, and the National Zoo, for staff and visitors. Partnerships with a service provider, such as Verizon, and solutions provider and architect, such as Cisco, Ruckus, or TengoInternet, will ensure that the investment delivers a consistent presence with minimal disruption to staff, researchers, and fellows working to bring more digital content and programming to visitors, teachers, and families. Furthermore, the platform can enable targeted advertising and gather limited visitor data in support of other initiatives; when visitors connect to Wi-Fi, the Smithsonian can track their journeys, identify repeat visitors, and improve audience engagement. This also boldly addresses the digital divide and supports our ongoing educational partnership with DC Public Schools.

The Smithsonian should consider implementing outdoor Wi-Fi first at the National Zoo. The 168-acre area can allow for proper testing and reconfiguration before expanding to the outdoor areas along the National Mall, virtual exhibition pop-ups, and many other locations that will require coordination with local governments and agencies. To determine the complexity of implementing a hot-spot solution, the initial steps may include evaluation of case studies and interviews with technology leaders of smart cities; universities and colleges; and national parks and outdoor attractions, such as amusement parks and campgrounds, that have implemented outdoor Wi-Fi.

An investment now in the necessary infrastructure will support future goals of the Smithsonian: becoming a workplace of the future, providing equitable access for every visitor, and aggressively showcasing the arts, culture, science, and technology for future generations. Future work will require more collaboration with staff across the Smithsonian, and staff will need to remain connected and work with ease and flexibility while collaborating with others, whether they are indoors, outdoors, or connecting remotely.

4. Experience Digital beyond the Walls of the Smithsonian

Recommended owners: Head of Digital Transformation and Director; OA; OUSE

Overview: To demonstrate the many facets of the Smithsonian, the organization should present displays of engaging digital experiences, impactful exhibits, and curated content beyond the National Mall to high traffic areas across the United States and the world. This allows the Smithsonian to expand its global presence while delivering educational and entertaining content to the masses; offer behind-the-scenes tours; and generate revenue by creating opportunities for sponsorship and donor recognition.

Short, curated content displayed on outdoor, digital boards—ranging from large premier panels and wallscapes to smaller transit shelters and video monitors at gas stations—can reach far more visitors and offer opportunities to bring knowledge, discovery, and experiences to people across America and beyond. A partnership with the Smithsonian Channel and Out of Home Advertising Association of America or a similar organization will expand the Smithsonian's method from long-term planning and delivery to on-site locations at the demand of the host facility, to short-term, pro-active planning and scheduled, synchronized delivery beyond its walls and those of associated museums. Such a partnership can also assist by determining placement and scheduling, and by creating high-fidelity imaging and video.

To determine the complexity of implementing a hot-spot solution, the initial steps may include evaluation of case studies and interviews with the STRI team to understand the process and best practices for virtual exhibition planning, visitor experience, and audience engagement.

Be a Trusted Source that Contextualizes Contemporary Issues

The Smithsonian's resources—including collections, exhibitions, education, research, digital platforms, and physical facilities—are vast and deep, collectively characterizing America's past and present. The collections are organized by art, culture, history, and science, engaging audiences of all ages. However, the digital realm and the growth of our digital audience in the New Normal provides an opportunity to use the power of the Smithsonian to address critical contemporary issues that cut across our collections, providing a depth of understanding and helping move the nation to a better future.

We recommend that the Smithsonian begin a program of cross-cutting Big Ideas.

Characteristics of a Big Idea

- **Transformation:** Sets up the Smithsonian to address big challenges facing the planet, society, our institution, etc. Will actively change attitudes, beliefs, and behaviors.
- **Ownability:** Something the Smithsonian is uniquely positioned to address and that others aren't doing or aren't doing well. Can be tightly linked—perhaps only linked—to the Smithsonian brand.
- **Essentiality:** Serves as a rallying point for staff, donors, and stakeholders. Tells us why the Smithsonian is a place people want to work for, support, and visit.
- **Simplicity:** Easy to remember and return to as a centering idea—a radically clear agenda. Contributes to a collective Smithsonian that is greater than the sum of its parts.
- **Sustainability:** Engenders long-term Smithsonian sustainability that encompasses green initiatives, financial strength and accountability beyond taxpayer support, cultural heritage, workforce development, and attention to audience needs.

Big Idea Generation and Selection

Recommended owners: Under Secretaries of Science, Museums & Culture, and Education

Overview: Create a process to determine where Big Ideas can come from (top-down, bottom-up, outside the Smithsonian) and how they will be selected. The ideas must be pillars of who we are, and yet challenge us to be bigger than who we are. The New Normal Committee has put forward a definition and initial slate of Big Ideas to be vetted by a panel led by the Under Secretaries but consisting as well of representative directors. Recommendations would be forwarded to Secretary for final approval.

In developing a pipeline for Big Ideas, it may be helpful for the Smithsonian to seek to learn from the experience other institutions that successfully use this approach. One example is the University College London (UCL). In the course of writing this report, we took the opportunity to speak with Professor David Price, the Vice Provost for Research responsible for UCL's 12-year initiative to develop a series of pan-institutional global challenges. He was generous enough to share both the successes of that program and the things they might do differently next time:

Know from the start what you're trying to achieve
In the case of UCL, the global challenges are based on what the institution sees as its founding principles, notably, the ethical and moral duty to find solutions for the most pressing problems facing

society and the ability to bring together cross-disciplinary teams to address those problems. Proposals for new global challenges are judged against these criteria, and the success of ongoing programs is measured using the same metrics. The global challenges are credited with catalyzing a rebirth of UCL's understanding its founding mission: *"The greatest amount of good for the greatest number."*

A coordinated, pan-institutional approach
It's important that Big Ideas do not become stove-piped and that there is a mechanism to maximize impact across the institution's traditional areas of activity. At UCL, the global challenges are expected to reach across research, pedagogy, knowledge exchange, translation, public engagement, and policy impact. This approach is overseen by a steering committee, embedded in the institution's broader strategic plan, and reflected in HR appraisal criteria.

Start with a limited number of Big Ideas
UCL now has six global challenges, but it started in 2009 with just one: the impact of climate change on global health. It was important to demonstrate how a global challenge would work and what success would look like. The first challenge was based on a partnership with the medical journal *The Lancet* to publish a major on global health under climate change. It is credited with changing the way governments and international health organizations think. And that is credited both with raising the external profile of the global challenges and with helping to create buy-in within UCL.

Provide seed funding but don't become a funding agency
UCL found that some seed-funding was vital to get the new initiates started and bring people together, but the overall scale of funding is limited to a few hundred thousand pounds per year across all the initiatives. In retrospect, UCL thinks that it would have been useful to be able to provide more seed funding to kick-start ideas but notes that it is important not simply to become a funding source. Successful Big Ideas should be effective at securing large-scale external funding.

More details of the UCL Global challenges can be found here: https://www.ucl.ac.uk/grand-challenges/about-ucl-grand-challenges. Other institutions that may be worth studying include Arizona State University, Australian National University, and the University of Edinburgh.

Big Idea Implementation

Recommended owners: Will vary with each Big Idea; each lead owner appointed by the Secretary will create a cross-Smithsonian, multifunctional implementation team

Overview: For Big Ideas to be successfully implemented, the Smithsonian should follow a strategic process. The first step is to set goals for the Big Idea by developing future states: If the idea is implemented successfully, how will it have changed our audience and the Smithsonian? The goals developed must be specific enough to be evaluated and must take into account the larger ecosystem that may already exist in the idea space. Each Big Idea should involve external partners, and the initial process should define what an effective partnership would look like for that idea and how it would help achieve the idea's goals. Plans for audience research as well as evaluation should be included from the beginning, and goals should be modified if needed based on research results. Every Big Idea should also include a K–12 education plan. Representatives from Marketing, Communications, Advancement, and Smithsonian Enterprises should be part of the implementation team.

Possible Big Ideas and Their Implementation

While the creation and selection of Big Ideas will ultimately be a formal, ongoing process as described above, the New Normal subcommittee created and tested several possible Big Ideas and distilled them to the four listed here. Discussion group feedback pointed out the need for the future state of each idea to clearly articulate external and internal visions of success.

As these Big Ideas have not been approved by Smithsonian leadership, full implementation plans were not developed. To demonstrate how the planning and implementation might work, however, four unit directors were asked to write up how they envision implementation of each Big Idea. See the Appendix for individual example plans. The New Normal Committee recommends that no more than two Big Ideas are launched at a time. In the case of the four ideas listed below, Race in America and Life on a Sustainable Planet are already underway at the Smithsonian in some form while the other two ideas would need additional time to incubate and develop.

1. Race in America

We are in the midst of a racial reckoning with the Black Lives Matter movement (#BLM) and the uprising against police brutality. How do we assist the nation and local communities as we collectively face systemic racism against Black, Indigenous, and People of Color in America?

Future state: The Smithsonian plays a vital role in the truth and reconciliation process around America's racial past and present.

Future internal state: The Smithsonian has gone through its own truth and reconciliation process and is an inclusive workplace.

2. Life on a Sustainable Planet

We only have one planet, and COVID-19 has shown us the interdependence of all aspects of life. How do we harness all of the Smithsonian to ensure that we can live a sustainable life on a sustainable planet?

Future state: The Smithsonian plays an essential role in ensuring that we all live on a planet that can sustainably support its population.

Internal future state: The Smithsonian always looks for ways to reduce our carbon footprint as a part of a global community.

3. America's Innovation Engine

The world can change overnight. We have seen radical imagination solve long-standing problems on a short timeline. How can we encourage positive creativity and innovation, using past and present understandings to drive the innovations of the future?

Future state: The Smithsonian levels the playing field to support the innovator, explorer, designer, and artist inherent in everyone.

Internal future state: The Smithsonian allows for failure during experimentation and has an established pipeline for staff innovations at all levels.

4. Healthy Communities

During a crisis, the Smithsonian can be a steward of health and well-being through a holistic exploration of community. Cultural heritage is a key aspect of community, as is ensuring that all members of a community can participate equitably. How can we help to build healthy communities—human, biological, virtual, etc.—that can weather future crises?

Future state: The Smithsonian is the nation's community center.

Internal future state: The Smithsonian partners with local community organizations and supports communities on the ground.

Serve as a Knowledge Partner to Pre-K–12 Educational Systems Nationwide

The New Normal has shown us the potential and responsibility of the Smithsonian to contribute significantly to formal and informal education in schools and at home. The development of a national K–12 strategy is in the works, and our core DMV audience should allow the institution to beta-test content before reaching out to a national audience. As in our other audience-related recommendations, the Smithsonian needs to define who it is trying to reach and what impact it is seeking to make, and to assess what progress has been made to date. For example, a strategy could focus nationally or on populous states that influence curriculum (Texas, California), or on states with low-rankings in education resources and learning outcomes. These strategies would look different and potentially have different partners.

Through Learning Lab and unit websites, the Smithsonian is creating new digital content and making existing content more accessible. The institution has also jump-started two key priorities: *Develop a Broad Portfolio of Educational Resources from High Touch to High Tech* and *Scale Learning Lab to Become a Coordinated Education Portal*. Clearly the New Normal has affected education, highlighting existing inequalities, enhancing the role of parents, and changing the definition of learning environments. Currently, the Smithsonian produces a large amount of informal education materials and in-person content, which can serve as the basis for potential partnering opportunities with groups and organizations that have a large reach, especially in lower socio-economic communities.

American formal education is diverse and complex, with public, charter, private, parochial, and home schools. Education priorities are largely mandated at both the national and state level, and teachers must cope with demands created by standardized tests. Competition among curriculum companies is high, with a small number of companies controlling a large part of the market share. The barriers to formal education are significant, and learning doesn't solely take place in the formal environment: It takes place anytime, anywhere. That said, the formal learning environment has not been a focus for the Smithsonian in the past, but it should be now. We are a trusted content partner that can bring authentic learning into this space. We can play a critical role in bridging formal and informal learning, which should be leveraged in this time of uncertainty.

The New Normal Committee did not have a direct focus on education, as education both underpins everything the Smithsonian does and requires recommendations driven by qualified subject matter experts. However, our recommendations in other areas have strong implications for education. These include:

1. Education as Part of our DNA

Recommended owners: Under Secretaries of Education (lead), Museums & Culture, and Science; OA; OCEA

Overview: The diffusion of knowledge is the Smithsonian's fundamental mission, yet the committee heard repeatedly that education at the Smithsonian is not necessarily valued or regarded as

fundamental to our mission. The New Normal provides an opportunity to recognize the expertise of educators and rebrand the Smithsonian both internally and externally as an education powerhouse.

Potential ways to embed education throughout the institution

- Undertake a nationwide campaign to shine a light on the Smithsonian as educational institution.
- In the vast majority of Smithsonian job descriptions, education should be mentioned and defined as a core function.
- Review collection, exhibition, and interpretation strategies to consider K–12, caregivers, teens, cultural consumers, and other education-related audiences.
- Balance staffing so that the ratio of curators and researchers to educators within the units is closer to a 1 to 1.
- Encourage finding innovative ways to infuse education in all Smithsonian activities.
- Research is a key part of the Smithsonian. We need to encourage and facilitate research in our educational and outreach programs as opportunities to further understand our impact. Consider forming an Education Research Group under the Under Secretary of Education.
- Plan to incorporate education as a key pillar in the upcoming Smithsonian campaign.

2. Define a Common Understanding of Education and Conduct an Educational Audience Assessment

Recommended owners: Under Secretary of Education (lead); Audience Data Working Group; Audience Experience Office

Overview: Do our educational programs have the reach and impact to achieve organizational goals? Are our units operating under a shared definition or common understanding of what education means to the Smithsonian? The committee recommends an overall Smithsonian audience assessment and engagement strategy with pre-K–12 learners as a key part of our audience. The Smithsonian will identify current audiences served and audiences not served. This audience data should be core to driving the mission and direction of each unit and can assist in identifying key audiences to serve. Education representatives in an Audience Data Working Group can begin mapping strategy for pre-K–12 within the recommended audience assessment.

3. Form Pan-Institutional Working Group for Education

Recommended owners: Under Secretaries of Education (lead), Science (lead), and Museums & Culture; SE

Overview: Educational programming is largely created, funded, and implemented at the unit level, but there is a clear need for a coherent One Smithsonian education program that leverages synergies and expands reach. NASM, NMNH, and the National Zoo—the major STEM units for visitors—have begun work on a coordinated STEM strategy. This could be expanded and could serve as a model to help inform and support the Under Secretary of Education in creating of a set of strategies that uses all of the content of the Smithsonian and allows for a coherent, comprehensive educational program that stretches across multiple units as appropriate.

4. Make Education an Integral Part of Big Idea Implementation

Recommended owners: Under Secretary of Education (lead); Big Idea Implementation Team; Education representatives

Overview: As discussed in the section above, education needs to be integral to the implementation of the Big Ideas. Each Big Idea should have a plan for pre-K–12 content in both formal and informal education. Educational programming should incorporate high touch to high tech. If possible, major educational partners for Big Ideas should be selected, to ensure that the program has reach, especially into underserved communities.

5. Consider Modeling Education after the Office of Advancement

Recommended owners: Deputy Secretary (lead); Under Secretary of Education; OA representative

Overview: In OA, unit advancement directors have a direct line to their unit director and a dashed line to the head of OA. OA facilitates HR, including managing PDs; tracks delivery on goals; and centrally manages key donor relationships. This helps align and deconflict advancement across the Smithsonian. It is a model that works well and could be used to provide better coordination between central Education and unit education departments.

Conclusions

This report seeks to help the Smithsonian emerge from the COVID-19 crisis as an improved organization, better able to serve our audiences and better equipped to address the opportunities, challenges, and choices that the American people will face in the 21st century.

The report focuses on four key areas of activity that we anticipate will be particularly important for us to thrive in the New Normal:

- How can we develop big, bold, pan-institutional ideas that make us more than the sum of our parts and address the big questions that face society today?
- How can we monetize digital technologies to create new experiences and reach new audiences?
- How can we nurture our talent base and be a progressive federal and trust employer?
- And how can we be nimbler in generating the philanthropic support and earned revenue we need to support our mission?

In each case the report proposes a limited set of high-level, high-impact recommendations. It does not seek to be encyclopedic. The recommendations themselves are based on feedback from a SOAR survey, focus groups discussions, and interviews with internal and external stakeholders. The input from these groups was extremely consistent. The recommendations should not be a surprise.

It is striking that all of the focal activities are areas where the Smithsonian's current ways of working have been starkly exposed by the COVID-19 crisis. For instance, despite the increased cooperation across teams that the COVID-19 era has brought, we still struggle to develop pan-institutional initiatives that meet the ambitions of both the Castle and the units and are sustainable into the future. Similarly, in the face of the challenge of shifting to digital platforms, we have found that our understanding of our audiences is extremely limited, and our digital content and resources are scattered and weakly developed compared with our competitors. Equally, we have struggled to create a modern work environment for our staff that not only enables remote working but makes people feel that they work in a modern work environment and for an organization interested in their development. And despite the collapse of our commercial businesses, we still find it extraordinarily difficult to develop new businesses and monetize our assets.

At the Smithsonian, as with so many aspects of our society, COVID-19 didn't cause these problems but has merely highlighted them. If we can overcome them now, the impact on our organization will be wide reaching. The common feature that underlies many of the recommendations in this report is the need for significant cultural change: the need to implement the pan-institutional strategic plan, to work coherently between the central functions and the units, to make decisions more rapidly and in a more collaborative and transparent way, and to be ready to take risks to achieve our goals.

The picture that emerges is a hopeful one. As we come out of the long, painful COVID-19 lockdown, we have the opportunity to apply the lessons we have learned, and to use the strong sense of common purpose that the crisis has engendered to transform the Smithsonian. If we get it right, we will be a confident, innovative public institution ready to thrive in the New Normal landscape and to bring inspiration, joy, and pride to the American people and the global community at a time when everyone needs it most.

Appendix 1: Committee Members and References

New Normal Committee Members

Ellen Stofan, Committee Chair, National Air and Space Museum John and Adrienne Mars Director
Ian Owens, Committee Deputy, National Museum of Natural History Deputy Director
Bethany Bentley, National Museum of the American Indian Assistant Director for Marketing and Communications
Shanita Bracket, National Museum of African American History and Culture Assistant Director of Visitor and Guest Services
Cody Coltharp, Smithsonian Center for Learning and Digital Access Information Technology Specialist
Katie Desmond, Smithsonian Office of Special Events and Protocol Director
Linette Dutari, Smithsonian Tropical Research Institute Associate Director for Communications
Charlotte Gaither, Smithsonian Office of Advancement Director of Constituent Engagement
Effie Kapsalis, Smithsonian Senior Digital Program Officer for Digital Strategy
Rebecca Kasemeyer, National Portrait Gallery Director of Audience Engagement
Carol LeBlanc, Smithsonian Enterprises President
Matthew O'Connor, Smithsonian Exhibits Deputy Director
Jeanne O'Toole, Office of Protective Services Director
Kim Robledo-Diga, Cooper Hewitt, Smithsonian Design Museum Deputy Education Director
Lisa Sasaki, Smithsonian Asian Pacific American Center Director

New Normal Committee Guest Speakers and Organizations

McKinsey & Company, 5/7/20
Ed Brown, Restaurant Associates, 5/14/20
National Geographic Partners and National Geographic Society, 5/21/20
Applied Minds, 6/4/20
Aaron Dignan, 6/23/20
Angie Judge, Dexibit, 7/1/20
Andrew Recinos, Tessitura, 7/7/20

Director Speaker Series, hosted by Kim Sajet

Thomas L. Friedman, 4/29/20
Andrew McIntyre,5/6/20
Temple Grandin, 5/13/20
José Andrés, 5/20/20
Vivek Murthy, 5/28/20
Judy Smith, 6/17/20
Anthony Fauci, 6/20/20

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Subcommittee 4: How We Operate Flexibly and Profitably, Notes and Clarifications

1. Special Events

The Smithsonian needs to decide about charging for content, especially as special event units and public programming are receiving numerous requests for virtual programming. Models to consider include:

- Panel Discussion Model-SI curators and end client discuss exhibits/objects
- Interview Model- client organization can interview a SI curator about exhibit content
- Webinar Model- SI curators deliver presentation with photos/videos of collection, guests can then join the conversation
- Professionally film SI exhibits and market them to corporate clients

It should be noted however, that the revenue that can be produced through fee based digital programs will not be equivalent to the funds produced through rental events. Video "fatigue" is often cited now and the price point the market will bear is not high. It is likely that by the time such a digital program gains momentum, rental events will be returning. For a speaker's bureau to be profitable, a SI wide policy would need to be implemented and adhered to even at the leadership levels.

2. E-Commerce

In 2018, Bain identified "omni-channel" retail as a core opportunity for SE. We then entered a period of a lot of turnover at the leadership level: COO, SE President, SE SVP Catalog Direct. We then completed a comprehensive review and evaluation to identify the best path forward. From this review, we had three main learnings:

- Issues with profitability of historic catalog-driven business model
- Lots of opportunity online
- Leaning into e-commerce key to future growth

Our new e-commerce strategy is digital first. This means that we will:

- Pivot from largely catalog-driven to primarily e-commerce-driven
- Focus on e-commerce customer experience and digital marketing
- Pursue easy wins
- Partner with museums for marketing, merchandising and email list growth (pilot this first with two museums/programs)
- Test & measure new ideas
- Lay the groundwork for retail integration and alternative print formats in the future

To implement this new digital first strategy, we should be aware of several key elements to achieving success:

- New approach requires investment
- Process has taken some time but has now been approved by Secretary Bunch
- We will be actively investing in e-commerce systems, customer experience, merchandising and marketing
- Re-organizing the direct team as a separate incubator team reporting directly to Carol
- Like all transitions, this will be bumpy, but we are all committed to this and working together

Implementation will also require that we transform our approach at SE. To this end, we will structure for stronger governance, collaboration and oversight of our e-commerce business.

We propose to:

- Position SE Retail as a key strategic partner
- Appoint Museum Liaisons
    - Ongoing collaboration with key representatives at each museum to elevate branding for individual museum storefronts, collaborate on merchandise assortment, optimize marketing efforts, and connect the commerce and content experiences
    - This will be an ongoing, relationship, partnership approach
- Create Business Oversight Team
    - Deep monthly review of financials, vendor selection and work in-progress
    - Includes Undersecretary of Administration, SE President, SVP Retail, SVP Finance and Admin, and others (TBD)
- Use SE Working Group of the National Board to advise on initiative
    - Reinvent the group
    - Appoint Todd Krasnow as first Chair of the SE Working Group, and narrow the broad (yet undefined) scope of the committee to target energy towards digital commerce

Appendix 2: Big Ideas Implementation Drafts

Race in America, draft by Lisa Sasaki

NOTE: This draft attempts to take into account the Race, Communities and Our Shared Future (RCOSF) Initiative's evolving structure and plan; however, it is not currently clear how this Big Idea and RCOSF will ultimately combine and/or supersede each other. Once this is determined a more detail roadmap with milestones can emerge, including a resource plan on how these items can be supported and funded over time.

The country is in the midst of a racial reckoning fueled by the #BLM movement and uprisings against police brutality and intersectional discrimination. How does the Smithsonian assist our nation and work with local communities to identify, face, and remedy systemic racism against BIPOC (Black Indigenous People of Color) in America? ***Race in America*** envisions that throughout the next ten years the Smithsonian will play a vital role in America's truth and reconciliation process in order to reckon with its past and work towards a shared future. The Institution will also undergo its own truth and reconciliation process and will make measurable advances toward becoming an inclusive and equitable workplace.

Who will be involved: It is imperative that the Smithsonian commits to ensuring *Race in America* touches every employee; however, the anticipated groups/units involved initially includes the RCOSF team; RCOSF directors steering committee; culturally specific and community-engaged units (ACM, APAC, CFCH, NMAAHC, NMAI, SLC); employee advocacy groups (Asian Pacific American Alliance, Smithsonian African American Association, Smithsonian Pride Alliance, etc.); unit-based DEAI committee representatives; and staff asked to join "action groups." Comprised of staff at various career levels and across multiple units and offices, Action Groups will be deployed to activate a specific part of the plan.

Guiding Philosophy: How does America face its racial past and forge a shared future given profound political and social divides? Countries such as South Africa, Chile, and Canada have turned to truth and reconciliation commissions to reveal past wrongs in the hopes of resolving deep conflicts left from past actions. While there is a long-standing debate as to if the U.S. government could implement such a commission, the ideals of the process – officially tracing events over time, giving voice to the affected population, and formally acknowledging that the wrong occurred and continues to impact people today – are possible. Given its trusted position across America, its global platform to share important stories, and its history of rigorous research tracing the origins of systemic racism, the Smithsonian is uniquely positioned to assist in this process while acknowledging the need to undertake its own internal work.

Outward Facing: Audience research and gap analysis

Do we know and understand how Americans see race and racism? What information do we have to guide our decisions? Answering these questions is critical to the Smithsonian's success so we can assess gaps between the desired outcomes and our core competencies, capacity and resources. ***Recommended Actions:*** Partner with a national organization (e.g., Pew Research Center) or university to establish a data-driven baseline of Americans' understanding about the origins and impact of racism. This data will be used to establish criteria for Initiative-based and unit-based programs, exhibitions, products, etc.

Outward Facing: Connecting to communities
Doing work with local communities is essential; however, the Smithsonian can do unintended harm if it "parachutes" into traumatized areas where it does not currently have relationships and trust. While it is important to cover the breadth of America – urban, suburban, rural, red, blue, east, west, north, south, etc. – the Institution should identify "anchor communities," locations where it has already done work and where we plan to invest the time and resources to do a deep dive into issues, needs, and ultimately reconciliation work. ***Recommended Actions:*** Work with unit directors to identify potential anchor communities through a mapping of existing relationships and past work in both culture and science. Use these relationships to determine if the Smithsonian would be welcomed, what local partners should be approached, what shared goals could be established, and how to assess impact.

Outward Facing: K-12 Education
Do educators have the resources they need to teach students about race and racism? What unique Smithsonian assets (first-person narratives, historic artifacts, art, etc.) can teachers use to deepen discussions on race? And do they have access to those assets? Instead of assuming the answers to these questions, classroom educators should be invited to share with us the challenges and opportunities they face in today's classroom. ***Recommended Actions:*** Partner with existing educational organizations, like Teaching Tolerance, who already engage with teachers. Utilize existing unit-based teacher institute models to create a national educator convening on race with the purpose of providing direction to the Smithsonian on how it should build its educational offerings and resources.

Inward Facing: Facing Our Past
Before we can expect America to face its racial past, the Smithsonian must also be willing to reckon with its own past as an instrument of colonialization and racialization. This exploration must not be seen as being critical of the Smithsonian but instead as a healthy part of self-examination. ***Recommended Actions:*** Engage with the Congress of Scholars and task them with uncovering the origins of the Smithsonian's collections, research, and facilities through the lens of restorative history and decolonization. Offer awards and publication opportunities to catalyze this research.

Inward Facing: Establishing a New Internal Baseline
Staff at all levels have expressed a willingness to undertake the internal work needed to address the Smithsonian's own issues with race, diversity, equity, and inclusion. Still, there is a wide range of understanding and comfort with exploring behaviors such as bias, microagressions, and privilege. The Institution must ensure that safe spaces are created for deep and difficult conversation if it is to be the inclusive workplace that it wants to be. ***Recommended Actions:*** Creating a mandatory set of trainings that establishes a new baseline of shared understanding and behaviors related to race and customized for our unique culture and realities. Invest in the development of specialized trainings for security and visitor-facing staff to help extend that understanding into how we serve our in-person visitors.

Inward Facing: Creating a Pipeline for Diverse Staff
There is an ongoing recognition that the Smithsonian continues to lag in the racial diversity of its staff. While there are multiple ways that this can and should be addressed through changes to policy, procedure, and directives, pipeline issues (how people with diverse backgrounds enter into or are barred from our work) remain an obvious area of improvement as there are existing efforts already underway. ***Recommended Action:*** Expand existing unit-based programs, like CFCH's Tech Teach and SLC's proposed Institute of Museum Practice, that provide opportunities to learn skills and jobs within a wide range of positions—from front of house to back of house to administrative suites. Offer paid internships and create clearer career ladders within the Smithsonian.

Life on a Sustainable Planet, draft by Kirk Johnson

The next few decades will present humanity with an existential challenge. Can we create sustainable communities and economies while also improving social justice, slowing and reversing climate change, and conserving Earth's ecosystems and the benefits they provide to humanity? Many children alive today will live to see the year 2100, becoming citizens of the 22nd Century. It is the goal of the Smithsonian to inspire citizens of all ages to wake to the realities of our time so that they to take advantage of science, technology, ingenuity, culture, and cooperation to contribute to a new era where people and nature can thrive indefinitely on Planet Earth.

The critical aspects to this desired future world are captured in the 17 United Nations Sustainable Development goals for 2015–2030, which seek to balance social, economic, and environmental sustainability. If we make genuine progress toward those goals, the next decade could well be the most consequential decade in human history.

As the nation's front door, the Smithsonian tells the nation's story and represents its aspirations. The Smithsonian is the nation's memory. In the past, the Smithsonian has spoken about the past, but in the future, the Smithsonian must speak about the future. It must inspire people to imagine a future with justice for all people and stability for the planet that sustains them. It can do this by painting a picture of the world we want rather than the world we fear, and then sharing the plans that will help us achieve this goal.

Education
We live in a world that is changing rapidly, and many trends appear negative. At the same time, we have the advantage of a host of new tools and techniques that have never been available before. The challenge is to educate rising generations with the tools and concepts of the future, so that they can benefit from our advances rather than inheriting our mess. While primarily an informal education institution, the Smithsonian has direct connection to in-house scholarship, federal agency expertise, and the time and treasure of key partners. This implies that while we will reach tens of millions of learners directly, we will need to be more of a supplier of educational products and credible nonpartisan content in order to reach billions of global learners.

Platforms to share information (exhibits, public programs, digital, etc.)
The Smithsonian's expertise, collections, programs, field stations, museums, research centers, and zoo are already focused on many of these global goals. It is now time to coordinate these efforts, join with a broad group of partners, and define a vision for the nation and the world. Our primary tools are public exhibitions, informal education, community science, collection- and place-based research, leading by example, and deploying our power to convene. We are in the middle of a transition to become the Digital Smithsonian so that our reach will become global.

Several projects already exist or are presently being planned. These include the Sustainability Council led by Smithsonian Facilities, the AIB exhibit about the Future; the renovation of NASM and its emerging STEM programming; NMNH's *Deep Time* and its planned *People and Nature* exhibition complex; the annual Earth Optimism event; the Conservation Commons coalition; the GDP curriculum of SSEC; several related efforts in the history, art, and culture realm; and the many field-based conservation and ecology projects of STRI, SERC, NZP, and SCBI.

Ironically, the iconic National Mall is only a few feet above present sea level and is likely to be inundated later in the century unless it is re-designed to be resilient. This is just one example of how the Smithsonian must adapt to survive, and how its adaptation can be an example for the country.

Internal/Next Steps
Given the breadth and magnitude of the sustainability challenge, the Smithsonian must create a viable mechanism to coordinate and fund this diverse portfolio of projects. The Undersecretary for Science should form a small group to build out a strategic plan for Smithsonian Life on a Sustainable Planet Science & Research and work with the Undersecretary for Education to create a Smithsonian plan for STEM education. Key external partners (including our existing federal agency partners) need to be identified and engaged. The science units must engage with the history, art, and culture units to assure that the social sciences are well represented in the effort. There is a strong argument to be made for hiring a Chief Sustainability Officer who would work with the Chief Diversity Officer to assure continuity between social justice and eco-justice.

Key references include UN 2015-2030 Sustainable Development Goals, the IGCC reports on climate change, and the UN 2006 report Social Justice in an Open World.

America's Innovation Engine, draft by Kim Sajet

"Every organization must deal with its natural, cultural inertia when faced with an adaptability gap. Closing the adaptability gap is today's universal leadership challenge." -- Bill Shirley.

The World has changed overnight. Not only have long-standing cultural and economic structures crumbled in the face of COVID-19 and the battle for social justice, but decision making has been compressed due to digital technology. The ability to adapt to change—and change fast—has become one of the most important requirements of leading organizations across the globe. Adaptation is especially critical for the Smithsonian that measures success in not in terms of short-term gain, but long-term impact.

Founded upon ideals of collecting and preserving the past in order to create new knowledge to benefit future generations, the Smithsonian's success will depend upon being able to harness the power of deliberate thought and hindsight to fast-paced innovation and creativity from within.

Defining Innovation and Creativity.
There are many ways to define innovation and creativity, but at the core an innovative idea tries to solve a problem that achieves value for everyone, while a creative one enables us to look at the world anew. Both innovation and creativity are non-linear modes of thought that rely heavily on trial and error, learning from diverse people with different perspectives, and giving them the permission to fail. The *process* of innovation and creativity is more important than the outcome, because it creates a culture of possibility and abundance rather than limitation and scarcity.[6] Done well an innovative and creative

[6] The writer CJ Lyons defines creativity as "Living in possibility and abundance rather than limitation and scarcity." The Writer Files interview, 2014.

organization also levels traditional hierarchies of power, attracts talented people from around the World, and results in visible impacts that ripple outward into the community.

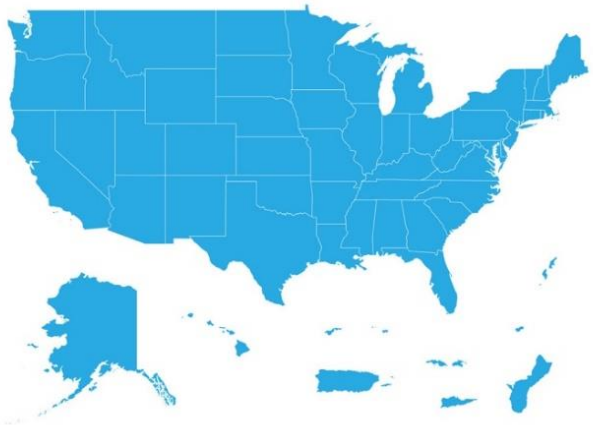
Theory of Change

To become America's Innovation Engine, the Smithsonian must develop a theory of change that acknowledges that the desired external future state is only possible by building a sustainable internal culture of innovation and creativity. The first step must be a willingness to look dispassionately at internals problems that are hindering the organization's growth—both technical and adaptive—and discard long-established processes and procedures that may disrupt the status quo. Especially at the leadership level, it will be important to welcome some loss of personal power and autonomy and accept some risk of failure. We must all agree that it is neither possible, nor desirable, to become an innovative and creative organization that only listens to the ideas of a privileged few.

The most successful organizational change is founded on a set of agreed upon values that is widely communicated and serves to frame collective efforts. While innovation and creativity may be boundless, it only becomes powerful when problems are clearly identified, and solutions are clearly measured. To that end, an important next step for the Smithsonian will be to develop a set of "guiding principles/values," that especially in the fast-paced environment we find ourselves can serve to "light the way" in moments of uncertainly and doubt.

Finally, while the Smithsonian tackles internal systems of inertia it is equally important to confidently and repeatedly promote existing programs of innovation and creativity; and foster "wow" moments of maximum national impact that signals our leadership role in transformational change. By strategically promoting "Big Ideas" with as must fanfare as possible, we inspire our staff to forge ahead, and encourage the American people to consider the devastating effects of 2020 as a "pivot point" towards creating a better future. To paraphrase Abraham Lincoln, the best way to predict change is to both create it and *communicate* it.

INTERNAL **EXTERNAL**



Internal / Next Steps

There are many ways to approach building an innovative and creative internal culture, but some suggested future next steps may include:

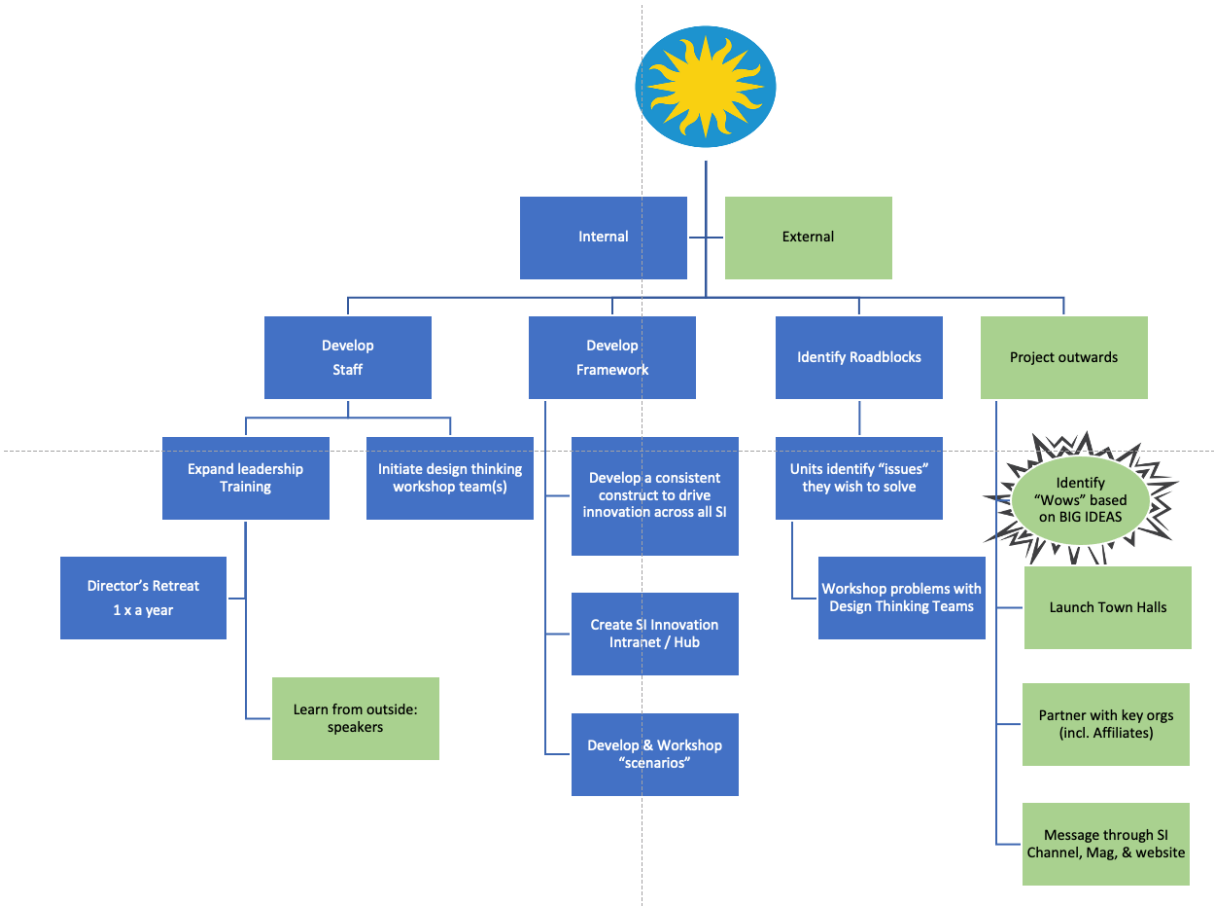
Hosting a series of pan-institutional group conversations that articulates a set of shared values that underpins everything we do.

Develop a Theory of Change and a framework for practicing continuous innovation and creativity through professional development workshops, town halls, and pan-institutional communications.

Hold regular coaching sessions with Smithsonian leadership focused on demonstrating how to manage and encourage open and inclusive teams, assess risk, and move from control and compliance to contribution and cooperation.

Identify the largest challenges that are holding back the Smithsonian from reaching its full potential and dedicate both time and resources to find innovative and creative solutions.

Agree upon a series of public "wows" tied to major initiatives and Big Ideas that will be presented to the American people and beyond in innovative, creative, and memorable ways.



Healthy Communities, draft by Melanie Adams

"There is no power for change greater than a community discovering what it cares about"
—Margaret J. Wheatley

As the world continues to deal with the dual pandemics of systemic racism and an ongoing health crisis, the Smithsonian can use its resources to help people discover not only what they care about, but how to turn caring into action. As a research and educational institution, the Smithsonian has a history of sharing its scientific, historic, artistic, and cultural knowledge with the world. Based on our experience and expertise, the best way the Smithsonian can help create healthy communities is by providing opportunities for educational growth through the creation of shared experiences.

Defining Healthy Communities

The first step is to define what is meant by the term "healthy communities." The Smithsonian should partner with policy organizations and community groups around the country to bring people together to discuss what makes a community healthy. These local conversations would build into a national conversation and produce a smaller advisory group charged with overseeing the project and ensuring the ongoing connection to the work happening in the communities.

Once there is a clear definition and agreement on shared values, the Smithsonian can begin to align its resources and create a toolkit that allows communities to assess their community's health and begin creating an action plan. The areas of a healthy community should include external components, such as the environment, culture, and equity, and internal components, such as a sense of belonging, shared humanity, and empathy. All areas that the Smithsonian can use its resources to help both educate and lead communities towards action.

Education

Communities are built on their histories, and in order to have a healthy community, there must be a true understanding of the history that recognizes the humanity and contributions of all of its members. In order to help communities achieve this goal, the Smithsonian should focus on creating educational opportunities for students of all ages that encourage research and personal exploration of the values of a healthy community. The audiences for these opportunities should be diverse and not focus solely on schools but should include organizations as well.

Platforms to share information (exhibits, public programs, digital, etc.)

The information that is learned in the community should then be shared on a variety of platforms depending upon the audience and the available resources. Part of being a healthy community is the idea of shared experiences and working together to present the information in any form can help create that sense of unity and shared contributions. Regardless of the platform, it is vital that all experiences provide an opportunity not only for engagement but for action that leads towards positive change.

Internal/Next Steps

In order for this initiative to be successful, the Smithsonian needs to enhance its community engagement skills. There are many organizations and individuals (both within and outside of the museum field) that can provide training on how best to engage with communities to co-create lasting results. The relationships between the Smithsonian and the communities need to be based on shared knowledge, expectations, and mutual respect for the resources that are brought to the table.

As the Smithsonian positions itself to better and more fully engage with communities around the world, it must look inward to remove the barriers that currently prevent this work from taking place. There must be a sense of urgency around the work to show both a commitment to change and a desire to move forward. The organization must focus on how to create partnerships with local organizations to support the work happening on the ground while also having the platform to bring people together to share best practices.

Within the Smithsonian, there are already units doing sustained community engagement work that can come together to lead the initiative. The cultural-specific units such as the Asian Pacific American Center and the Latino Heritage Center are a natural fit because their work is based in communities. As the Smithsonian's only community-based museum, the Anacostia Community Museum has over 50 years of experience working on the ground with diverse communities. The Folklife Festival has been working with diverse communities around the globe and can bring a unique perspective to engaging people around the values associated with healthy communities. Finally, SITES has relationships in communities across the country that could allow for a starting point for the project though the use of established relationships. As a steering committee is put together for this initiative, it is important that the units selected have experience, credibility, and can think strategically on how to best work with communities to achieve tangible results.