

# museum enterprises - conference

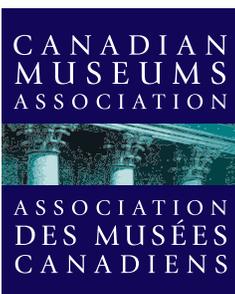
**January 26 – 28, 2017**

Westin Prince Hotel, Toronto



program agenda, delegates and exhibitor listing

admission  
engagement  
facility rentals  
food services  
membership  
retail services  
revenue generation  
special events  
visitor services



# THURSDAY, JANUARY 26



8:00 am..... **Registration** *Crown Foyer*  
8:00 am..... **Welcome Coffee** *Crown Foyer*

8:45 – 9:00 am ..... **Symposium Opening & Welcome** *Crown*

9:00 – 10:00 am ..... **Keynote Address** *Crown*

**John Grimes**, *Executive Director, Mission + Strategic Solutions, Inc.*

## **The Age of Objects is Over: Human Relationships and the Future of Museums**

For more than two centuries, museums have sustained themselves by providing privileged access to rare and interesting objects situated in didactic settings. Now, this traditional model, by itself, is becoming outmoded, as peoples' time and attention is increasingly focused on managing massive streams of digital information and online social networks. More than ever, it is critical for museums to find new ways to build and strengthen social relationships with and among existing and prospective audiences, in order to stay relevant and viable. Employees that interact with visitors, especially those in "front line" positions, have an essential role to play.

**About Your Presenter:** John R. Grimes is Executive Director of Mission + Strategic Solutions, Inc. a Kelowna, B.C.-based consultancy which advises non-profit organizations on strategy, fundraising, and governance. Grimes is a former museum director and curator with more than 40 years' experience with museums and non-profits.

10:00 – 10:20 am ..... **Networking Break** *Crown Foyer*

10:20 am – Noon..... **Sharing Solutions 2017**

Over the past 20+ years, the category-based discussion groups offered during the conference have generated hundreds of topics for discussion. This is your chance to share your innovative solutions and learn from your peers during this interactive session. Discussion Groups have been broken down according to the operational budget of your institution + at your request the length of this session has been extended to provide each of you with ample opportunity to be heard.

- ① **Budgets less than \$100,000** *Duncan*
- ② **Budgets \$100,000 – \$499,000** *Princess*
- ③ **Budgets \$500,000+** *North York*

Noon – 1:00 pm..... **Lunch** *Jade Palace*

1:15 – 2:15 pm.....**Educational Sessions**

**① Whose Hands are in the Cookie Jar?**

*Crown*



**Presenter: Stephen O'Keefe**, *Retail Council of Canada Loss Prevention Lifetime Achievement Award Recipient*

Who is responsible for the majority of losses incurred? This session discusses a critical but often unpopular topic of theft by customers and employees. Case studies and discussion of your concerns will provide tips for identifying risk and implementing cost-effective mitigation steps.

Stephen O'Keefe has worked for over 30+ years with some of the greatest international retail brands as a leading authority on loss prevention, security, risk management, health and safety and process improvement. Before establishing his own consultancy firm, Stephen held a variety of loss prevention management positions with Sears Canada, Zellers, The Hudson's Bay Company and Walmart Canada.

**② What Benefits Do Members Value? A Case Study**

*Duncan*

**Presenter: Nick Foglia**, *McMichael Canadian Art Collection*

There are two ways to look at membership — acquisition and retention. To acquire members, you have to persuade and sell. To retain members, you have to remind and remind about the benefits and advantages of remaining a member. But do you know which benefits are driving member satisfaction? This presentation will focus on the findings of a study conducted with current and lapsed McMichael members in December 2015 and its impact on their membership offering.

2:30 – 4:00 pm.....**Educational Sessions**

**① Actionable Strategies:  
Using Digital Marketing to Grow an Engaged Museum Community**

*Crown*

**Presenters: Larry Chartier** and **Lisa Matheson**, *CMSintelligence, Inc.*

Use your digital marketing activities to get more people to join your museum community, visiting more often, both in-person and online. Join Lisa Matheson and Larry Chartier, Partners in CMSintelligence Inc., a Ontario-based website and online marketing agency, to explore 'actionable' strategies for reaching, engaging and maintaining your museum community through your digital activities.

This session will discuss:

- Your website: the strategic balance between form (design) & function (usability)
- Developing content that 'calls' your audience to 'action'
- Using A/B testing to test & optimize digital strategies
- How to reconnect with 'soft interest leads' and get them to 'stick'
- Leveraging Lead Generation Magnets to expand your database
- Using Social Media strategically to generate results that you can measure

**The bottom line:** Improved audience engagement to create a stronger museum community and more action — increased museum visits, increased memberships, growing database lists, increased product / F&B sales.

**② Customer Service in Museums and Art Galleries**

*Duncan*

**Presenters: Cheryl Blackman** and **Alexander Johnston**, *Royal Ontario Museum*

Canadian museums have done a wonderful job of preserving history and culture and art for the enjoyment of all Canadians, whether in a large city such as Ottawa and Montreal, but also in smaller communities sprinkled throughout the country. However, often the visitor experience is not the primary investment focus, given tight budgets and small staff resources. Some museums in Canada have begun investing significant dollars into customer service in recent years, and it is not always those with the largest annual attendance. Many museums strive to serve the customer and quickly resolve any customer complaints or inquiries. However, most museums don't have access to a call

centre for customer inquiries, and those that do often have limited hours and very limited budgets for investment in infrastructure. We often measure our museums against other similar venues in the US and in the world on visitor experience, but is this a fair comparison? How do Canadian museums really compare in customer service investment and how can we use this information to justify the investment of precious resources? Will an investment in customer service and better visitor experience translate into a return on investment for Canadian museums

4:00 – 7:00 pm..... **CMA EXPO and Stars + Dogs Reception**

Valleybrook

**MC: Chantal Demers**, *Canadian Museum of History*

Meet suppliers and artisans whose products range from apparel and fair trade products to jewellery to decorative accents. Join your colleagues and valued exhibitors in an entertaining icebreaker that's sure to be loaded with lots of laughs. Bring your best selling "Star" item (by dollar value or volume and turn) plus one "Dog" item. They'll be displayed anonymously. Delegates and exhibitors will have the opportunity to guess which are the stars and which are the dogs.

**ENTER THE DRAW FOR WONDERFUL PRIZES!** To qualify for the draw, have the exhibitors initial your ballot. Deposit your completed ballot at the Prize Table by 6:30 pm on Thursday, January 26.

**YOU MUST BE PRESENT TO WIN!**

## FRIDAY, JANUARY 27



8:30 am..... **Information**

Crown Foyer

8:30 – 9:00 am ..... **Morning Coffee**

Crown Foyer

9:00 – 10:00 am ..... **Keynote Address**

Crown

**Josh Basseches**, *Director and CEO, Royal Ontario Museum*



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Josh Basseches became the Director and CEO of the Royal Ontario Museum (ROM) in March 2016. Basseches is a distinguished leader with more than two decades of experience transforming museums, enriching their visitor experience, and guiding institution-wide initiatives that bring collections and research to audiences worldwide. His bold vision for the ROM includes taking it from one of Canada's great museums, to its next level as a globally renowned innovator and thought leader. Basseches is inspired by the ROM's singular capacity to integrate and connect the disciplines of art, culture, and nature.

Prior to his ROM appointment, Basseches was Deputy Director of the Peabody Essex Museum (PEM) in Salem, Massachusetts. At PEM, he played a central role in the institution's decade-long reinvention into one of America's leading museums, as well as in its recent capital campaign, helping to raise more than \$600 million (CDN). Before joining PEM, Basseches served as Executive Director of the Harvard Museum of Natural History (HMNH), where he launched the repositioning of the HMNH from a prestigious, but internally-focused university museum, into a vibrant, public-serving institution. In addition, Basseches has been active in the museum professional community, having spent ten years on the board of the New England Museum Association (NEMA), most recently, as President.

Basseches holds an M.B.A. from Harvard Business School, an M.A. from Boston University, and a B.A. from Amherst College. He is currently completing a Ph.D. in the History of Art and Architecture at Boston University. His research and writing focuses on international artistic and cultural exchange.

10:00 – 10:15 am ..... **Networking Break**

*Crown Foyer*

## Educational Sessions

10:15 – 11:45 am ..... ❶ **Innovation in Front-Line Visitor Services, Visitor Experiences**

*Crown*

**Presenters:** **Al Chapman**, *Legislative Assembly of Alberta* and **David O'Hara**, *City of Toronto, Fort York National Historic Site*

Both the Legislative Assembly of Alberta and Fort York opened new Visitor Service centres in the fall of 2016. In conjunction with their respective openings, they presented the Magna Carta travelling exhibition. Two seasoned visitor service professionals will share their expertise in the field, including taking a visitor services department through a new building construction or renovation, the launch of a high profile travelling exhibition and the resulting fallout — both good and bad. Delegates will be able to see first hand Friday afternoon the new Visitor Services Centre at Fort York.

10:15 – 11:45 am ..... ❷ **Copyright, Licensing and the Museum or Gallery Store: What You Need to Know**

*Duncan*

**Presenters:** **Tanya Anderson**, *Canadian History Museum* and **Constance MacDonald**, *Royal Ontario Museum*

Laws regarding copyright and licensing can at times be a bit overwhelming. Managed incorrectly, your brand identity and rights can be at risk. Join our experts as they unravel the intricacies of one of this often misunderstood aspect of business law. Through this session you will learn:

- How to protect your trademark
- How to deal with trademark infringement
- What is copyright
- What can and cannot be copyrighted
- Who you should consult and work with at your institution to ensure you are following all of the rules.

Noon – 1:00 pm ..... **Lunch**

*Jade Palace*

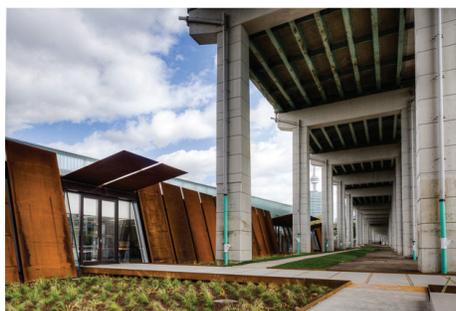
1:30 – 5:30 pm ..... **Offsite Mobile Workshop**

*Offsite*

Look at how others do it! Notice we haven't called this a tour? That's because it's so much more: educational in scope and designed for you to bring back ideas to your museum that you will be able to implement. Included in the Conference registration fee.

### Fort York National Historic Site

The City of Toronto opened the new Visitor Centre at Fort York in the late fall of 2014. The award winning building, which was designed by the Canadian team of Patkau Architects Inc / Kearns Mancini Architects Inc, helps the Fort tell its 200-year story and orient visitors to the entire 43-acre National Historic Site. Fort York houses Canada's largest collection of original War of 1812 buildings and 1813 battle site. Located in the heart of downtown Toronto, Fort York is open year-round and offers tours, exhibits, period settings, and seasonal demonstrations. During the summer months, the site comes alive with the colour and pageantry of the Fort York Guard. MEC delegates will be taken on a tour the site, the Visitor Centre, and the recently installed exhibits within.



# SATURDAY, JANUARY 28

8:30 am ..... **Registration/Information** *Crown Foyer*  
8:30 – 9:00 am ..... **Morning Coffee** *Crown Foyer*

9:00 – 9:45 am ..... **Keynote Address** *Crown*

## **Alan Mallory**, *Mount Everest Climber*



Climbing Mount Everest is considered one of mankind's greatest feats of human endurance. The two-month quest to reach the highest point on earth is a journey filled with unparalleled challenges and some of the roughest and most extreme conditions imaginable. In the spring of 2008, Alan Mallory embarked on the adventure of a lifetime and set a world record along with four members of his family after an incredible self-guided expedition on the mountain. The expedition challenged the mental, emotional and physical limits of their entire beings and at every stage of the ascent demanded an unwavering commitment to resilience and perseverance. Alan's keynote is a gripping and informative presentation that is supported by many of the stunning photos and short video clips captured along the gruelling trek to the top. It highlights the importance of many leadership qualities such as strategic planning, innovation, effective communication, teamwork and trust as well as the mentality and passion involved in conquering one's own Everest, whatever that may be. From Alan's terrifying experience of running out of oxygen on the summit ridge to when they thought they had lost his sister Laura forever, it seemed as though every section of the climb had some terrifying hardship to overcome. The real story is much more than the climb however; It is about a unique team that set a ambitious goal, pursued it with a passion, and eventually achieved success. The powerful lessons learned during the intense and many times critical situations encountered during the expedition can be applied to all walks of life, including the role each of you plays as a critical team member at your museum or gallery!



9:45 – 10:00 am ..... **Networking Break** *Crown Foyer*

10:00 am – Noon ..... **Educational Sessions**

### **1 How to Increase Sales in 2017**

*North York*

**Presenter, Barbara Crowhurst**, *Retail Makeover*

With more and more emphasis on increasing earned revenue, there is a need to ensure that our institutions are not only maintaining current sales but are looking for innovative ways to increase sales and profitability.

Retail Expert Barbara Crowhurst will take attendees through a review of your institution's business practices for maintaining and increasing sales.

Key topics will include:

- How to initiate add on sales and why this strategy is so important.
- How you can improve conversion rates and why that's critical to increasing sales.
- How the idea of using a pick of the week works so well to increase sales with almost immediate positive results.
- Why you need an effective promotional calendar.
- How a strong store lay out and how putting Barb's retail real-estate grid in play will help increase sales.
- The importance of margins and why you need to review monthly + what you need to look for in this report.

- Are you properly pricing your products?
- Do you have staff that knows how to sell?
- Is the visitor experience culture a strong element in your store?
- Why setting sales targets are so important.
- What are the key analytics you must keep your eye on.

**You will pick up many tips on what you need to do better, much better!**

## ② What's in a Name? Members, Contacts and More

Crown

**Presenter: Margaret Chrumka**, *Manager of Operations, Kamloops Art Gallery*

This session will consider what variously sized institutions are doing to collect contact and membership information. We will consider why this information is useful and specifically what information, when. In 2013, the Kamloops Art Gallery moved from a DOS based membership database, multiple and duplicate excel spreadsheets and a few sticky notes to an affordable cloud-based database. We will spend this session talking about the different ways we can capture information about our visitors and members and how we can put it to use. Following this session, participants will be able to put systems in place and enhance systems to capture contact information in an effort to increase engagement and memberships.

12:15 – 1:45 pm

## Lunch and Learn

Crown

**Presenters: Robert Laidler** and **Sue-Ann Ramsden**, *Canadian Museums Association*

Enjoy lunch with you colleagues and hear about the latest products available from the CMA Wholesale Consortium Program. As well, you'll see what we have in store for the special CMA Canada 150 product line — designed exclusively for museums and galleries.

2:00 – 4:30 pm.....

## Half-Day Workshop

Crown

### ① Taking Leadership to New Heights

**Presenter: Alan Mallory**, *Mount Everest Climber*

This engaging workshop expands on the information shared during Alan's keynote while incorporating more interactive discussion and short hands-on activities. Participants will explore various elements of working through communication challenges, maintaining a leadership mindset, healthy interpersonal dynamics and methods for building a level of trust in professional relationships. Examples from Everest and Denali (Mt. McKinley) are used to illustrate various dynamics of effective leadership and human interactions, with parallels being drawn between situations encountered during mountaineering and those in the workplace.



4:30 – 4:45 pm.....

## Conference Closing

Crown

5:00 – 7:00 pm.....

## Closing Reception

Jade Palace

