Smithsonian Institution

Web and New Media Strategy

Version 1.0

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Executive Summary

This Smithsonian Web and New Media Strategy was created through a fast and transparent process that directly involved, and continues to involve, hundreds of stakeholders inside and outside the Institution. This strategy will feed into the Smithsonian's comprehensive strategic plan, currently under development.

Three main themes emerged during the strategy-creation process:

Update the Smithsonian Digital Experience: Build on excellence and the potential for excellence throughout the Institution by focusing on Web-publishing fundamentals and improving access to collections, community, and content across all platforms.

Update the Smithsonian Learning Model: Support new kinds of learning, innovation, and knowledge creation inside and outside the Institution.

Balance Autonomy and Control within the Smithsonian: Balance the benefits and risks of central control and creative autonomy while binding oversight and operations to a shared vision for the future.

To make these themes actionable, this strategy describes eight goals, each of which has its own set of policy, program, and tactical recommendations. The eight goals are:

1. Mission
Prioritize Web and New Media programs in proportion to their impact on the mission

2. Brand
Strengthen brand relationships throughout the Smithsonian

3. Learning
Facilitate dialogue in a global community of learners

4. Audience
Attract larger audiences and engage them more deeply in long-term relationships

5. Interpretation
Support the work of Smithsonian staff

6. Technology
Develop a platform for participation and innovation

7. Business Model
Increase revenue from e-commerce fundamentals and Web 2.0 perspectives

8. Governance
Design and implement a pan-Institutional governance model

These themes and goals are unified by the concept of a ***Smithsonian Commons***—a new part of our digital presence dedicated to stimulating learning, creation, and innovation through open access to Smithsonian research, collections and communities. The Smithsonian Commons would also provide labor- and cost-saving tools for Smithsonian Web and New Media teams and collaborators.

This strategy describes transformational change for the Smithsonian. It can be successfully implemented if the Institution begins now to actively prepare itself and to accept that change will be achieved incrementally, one small victory at a time.

Moving Forward

Senior Management needs to do four things to begin implementing this Web and New Media Strategy:

1. Connect with the pan-Institutional and digitization strategies

To ensure clarity and focus, key points from this Web and New Media Strategy need to be incorporated into the emerging Smithsonian strategic plan and digitization plan, and elements from those plans need to be injected into this Web and New Media Strategy as they are codified

2. Appoint a leader

Appoint a pan-Institutional Web and New Media leader and give that person the decision authority and visibility to lead change

3. Create a tactical road map

Develop detailed plan that translates these strategic and tactical priorities into prioritized tasks, milestones, and budgets

4. Begin work on the Smithsonian Commons

The Smithsonian Commons (described in detail in section IV. *The Smithsonian Commons: A Place to Begin*) is the conceptual cornerstone of the Web and New Media Strategy, and it may be the vehicle through which we obtain the funding needed to execute the overall strategy. Tell potential funders about the commons vision and consult them regarding its objectives and funding potential. Produce a proof-of-concept for the Smithsonian Commons.

I. Strategy in Context

> *"For the Smithsonian to remain a vital institution at this important time in our history, we need to fully engage younger generations with our collections and our knowledge. We need to use new digital technologies to their fullest potential so that we can fulfill the Smithsonian's 19th-century mission—'the increase and diffusion of knowledge'— in a thoroughly 21st-century way for the benefit of all Americans and people around the globe."*

<div align="right">Secretary G. Wayne Clough, January 2009</div>

This Web and New Media Strategy is part of a comprehensive Institution-wide strategic planning initiative currently underway at the Smithsonian. The strategic recommendations included in this report are closely aligned with the Institution's overall direction and efforts to consider the issues of digitization and revenue generation. This strategy also builds on the exploration and enthusiasm of the Smithsonian 2.0 event held January 23 and 24, 2009.

This Web and New Media Strategy began with a series of facilitated workshops with Smithsonian stakeholders. The workshops focused on education, business models, technology and operations, curation and research, and the perspective of directors. Two hundred and ninety-four Smithsonian stakeholders from 55 museums, research centers and business units participated in one or more workshops.

Each of the workshops and planning sessions were documented by a real-time transcription of the proceedings posted to a wiki established for this purpose (http://smithsonian-webstrategy.wikispaces.com). The main intent of the workshops was to move relevant information to the wiki where it could be openly evaluated, sifted, weighed, and considered by all. The wiki was the platform on which this strategy was sketched, discussed, debated, refined and finalized, all within the view of those who care most about the Smithsonian. Finally, the strategy was reviewed by the Smithsonian Web and New Media Steering Committee.

This document describes a transformational change for the Smithsonian, which will have impact on the Institution's culture, operations, allocation of resources, talent recruitment, and priorities. This strategy can only become operational with adequate resources, and will require the Smithsonian to rethink the ways in which it generates revenues and prioritizes how resources are allocated to programs. This strategy is bold but achievable—it can be successfully implemented if the Institution begins now to actively prepare itself and to accept that change will be achieved incrementally.

The Smithsonian aspires to a bold vision. The world is changing at an ever-accelerating rate and this strategy acknowledges that the Smithsonian has a chance now to synchronize its mission with new tools for the increase and diffusion of knowledge.

II. Strategy Themes

Three themes emerged through discussion in the staff workshops, on the public wiki, and through ongoing engagement with stakeholders inside and outside the Institution. They provide context important to understanding the eight strategic goals described in section III.

Theme 1: Update the Smithsonian Digital Experience

Today, the Smithsonian Institution's digital experience is primarily in the form of a collection of separate Web sites. There are few, if any, mechanisms that support *findability* (the combination of search, information architecture, and design that enable digital information to be found), Web 2.0 features (such as content syndication, "e-mail to a friend," tagging, sharing, and social bookmarking), and sustained/repeated user engagement across multiple platforms—and in many cases even within individual Web properties. We are like a retail chain that has desirable and unique merchandise but requires its customers to adapt to dramatically different or outdated idioms of signage, product availability, pricing, and check-out in every aisle of each store. This needs to be addressed to realize the full potential of the Smithsonian's digital initiatives.

Addressing this challenge does not mean abandoning the notion of strong, unique, and creatively autonomous museum/unit Web sites (in fact, strong and innovative unit-based sites are the core strength of the Institution and should be protected at all costs), but it is important to note that the current model undermines our effectiveness as an *Institution*. The future Smithsonian digital experience should encourage focused, unit-driven and unit-controlled audience engagement, but it should also support combined unit, pan-Smithsonian, and end-user solutions for findability, design, collections access, and community engagement across Internet, in-museum, mobile, and emerging platforms as a whole.

Updating the Smithsonian Digital Experience: Web Sites Listed on the www.si.edu Home Page
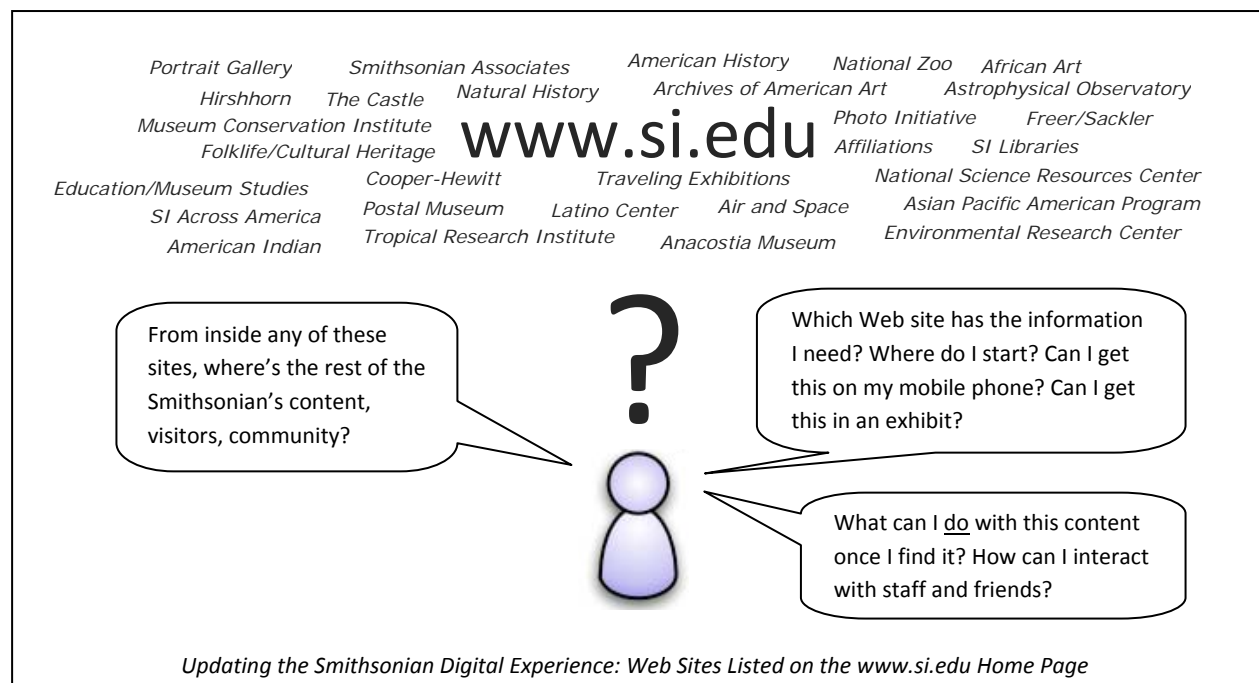
Theme 2: Update the Smithsonian Learning Model

James Smithson wrote that "Knowledge should not be viewed as existing in isolated parts, but as a whole. Every portion throws light on all the others." This Web and New Media Strategy seeks to update the Smithsonian's *learning model* to be aligned with Smithson's founding vision and new kinds of education and knowledge creation made possible, in part, by technology.

This strategy is based on the growing understanding of *learning* as a hybrid of formal education and self-directed discovery that can be brought together and enhanced by online tools and communities. Increasing online access to Smithsonian collections is part of the equation for promoting learning. (A detailed digitization strategy is under development.) The impact of online collections can be greatly magnified by highlighting the knowledge and insight of Smithsonian experts, an intellectual property policy that encourages re-use and sharing of our assets (where appropriate), and a matrix of tools, policies, and resources that allows our audiences to be our partners in the increase and diffusion of knowledge.

Old Learning Model   **New Learning Model**

Updating the Smithsonian Learning Model
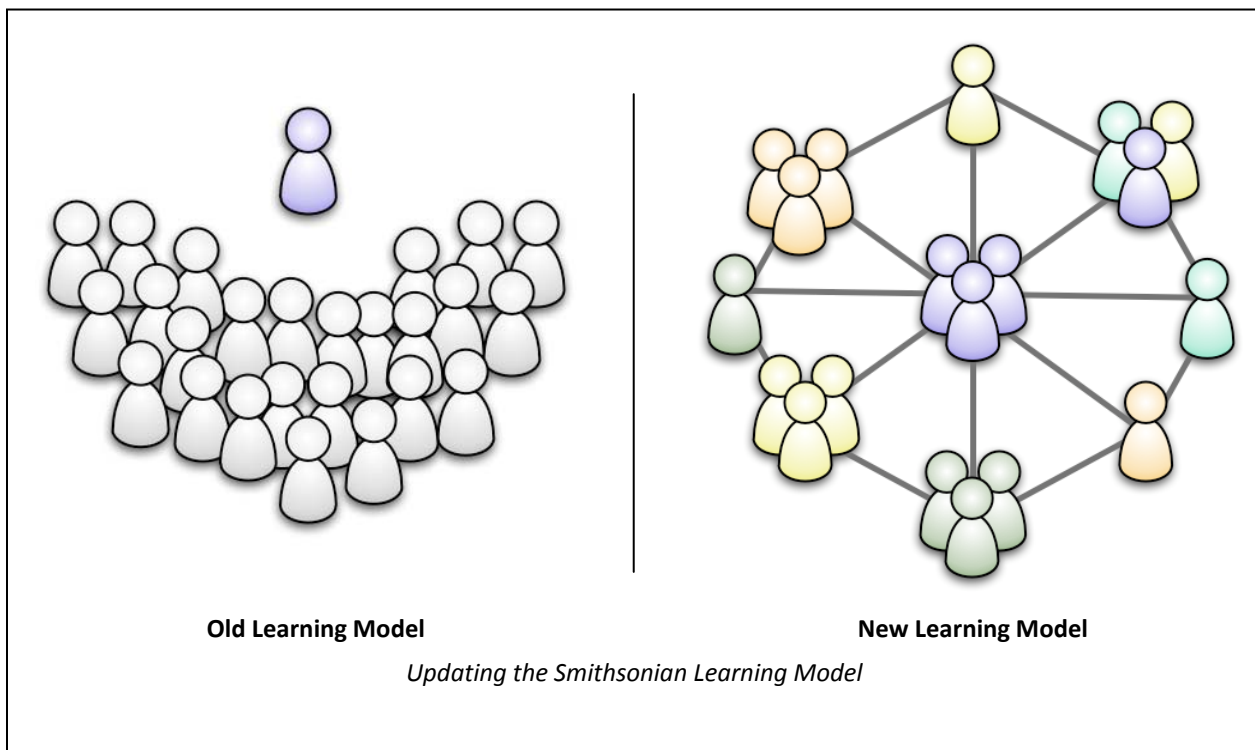
Theme 3: Balance Autonomy and Control within the Smithsonian

From an internal perspective, successful Web and New Media programs are created largely in isolated pockets of excellence. While this model allows for freedom for Web teams within the Institution's museums and research centers, it also creates an environment where effort is duplicated and opportunities to collaborate and pool resources can be overlooked. In addition, internal Web teams, working separately, are approaching the limit of what they can do on their own: units cannot afford to establish, maintain, and refine the platforms they want individually, and if they could, the repetition of effort or the effect on end-users would be counterproductive: Imagine 30 separate e-commerce, event ticketing, or personalization systems.

The key to accomplishing the transition from our current organizational model (in which the central organization takes a "hands off" approach to Web stewardship) and a future model (in which the central organization is more engaged) is in achieving a balance between central control and creative autonomy while binding oversight and operations to a shared vision and goals.

Staff at the unit and collection level are the Smithsonian's greatest asset, and the best Web production happens when collections (or research data), subject-matter experts, Web teams, and the public are working in close proximity. This Web and New Media Strategy respects and encourages innovation and autonomy throughout the Smithsonian's organizational structure.

The expertise and accomplishments of unit-based staff, however, need to be supported and enhanced by an internal commons of shared tools, services, and standards. The use of these shared resources should be voluntary for Smithsonian units, but should be highly desired because the tools and services provided are well conceived, well supported, and make critical work easier and cheaper for participants.

The principle of a commons is described in detail in section IV. *The Smithsonian Commons: A Place to Begin*.

III. Strategic Goals

Summary of Web and New Media Strategy Goals

1. Mission
Prioritize Web and New Media programs in proportion to their impact on the mission

2. Brand
Strengthen brand relationships throughout the Smithsonian

3. Learning
Facilitate dialogue in a global community of learners

4. Audience
Attract larger audiences and engage them more deeply in long-term relationships

5. Interpretation
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8. Governance
Design and implement a pan-Institutional governance model

Goal 1: Mission

Prioritize Web and New Media programs in proportion to their impact on the mission

Rationale

Once on the fringe of institutional and public awareness, Web and New Media initiatives are now considered to be a critical part of the Institution's core activities and future: They need to be funded and managed accordingly.

Policy/Program Goals:

Leadership: The Secretary should continue to be a visible and vocal advocate for prioritizing the use of Web and New Media technologies across the Institution

Budget: Allocate budgetary resources to digital technology initiatives that are commensurate with their importance to the future of the Smithsonian

Compensation: Align compensation to reward those who excel in use of digital technologies that best support programmatic objectives

Accountability: Create a culture of accountability. Require regular reports on Web and New Media initiatives, including target audiences, measurable performance goals, technologies used, resources expended, and lessons learned

Visibility: Underscore the importance of the Smithsonian's Web and New Media initiatives by connecting this strategy to the visioning and program development for the Arts and Industries Building, National Museum of African American History and Culture (NMAAHC), and other Institution initiatives

Tactical Implementations:

- Recruit a pan-Institutional Web and New Media leader and give that person the decision-authority and visibility to lead change

- Align budgetary processes to support a tactical road map for this strategy. In the short-term, make discretionary funds available at the unit level to promote experimentation/innovation and ensure that successful projects can be replicated across the Institution

- Continue to leverage the excitement around SI Web 2.0 with annual or bi-annual follow-on conferences. Coordinate ongoing engagement with external experts

- Build expertise in metrics and evaluation and implement standard lightweight (not burdensome) reporting processes. Use a blog and dashboard to showcase successful results and best practices

- Coordinate this strategy with the emerging program/goals for the Arts and Industries Building and the NMAAHC

- Examine Human Resources policies/practices to align with and support this strategy

Goal 2: Brand

Strengthen brand relationships throughout the Smithsonian

Rationale

The Smithsonian Institution brand is powerful in its reach, recognition and prestige. The brand is associated positively with perceptions of trust, history, artifacts, and authenticity, yet many audiences (internal and external) have difficulty understanding the full depth and breadth of the Smithsonian's offerings or explaining the core meaning of the brand. Many still think only of "the nation's attic" when thinking about the Smithsonian. Furthermore, many audiences appear to be uncertain of the relationship between the overall Smithsonian brand and the brands of the individual museums and research units that comprise the full Smithsonian Institution.

Far more people encounter the Smithsonian online than in person, and the Institution's Web sites and new media programs will play an increasingly strong role in influencing perceptions of the Smithsonian brand. Web and New Media branding is an important tool for ensuring that users form strong associations between the Smithsonian and the concepts of learning and education.

Policy/Program Goals:

Positioning: Reposition the Smithsonian brand to emphasize its role as the preeminent facilitator of learning for national and global audiences

Voice: Shift the Smithsonian brand voice away from attributes of institutional/omnipotent/authoritarian towards attributes of individuality/relevance/passion for learning

Attitude: Enliven the Smithsonian brand to increase its appeal to and relevance for younger audiences

Architecture: Establish a comprehensive brand architecture that describes a strong and consistent relationship between the Smithsonian master brand and the sub-brands for each of the museums and research centers that comprise the Smithsonian enterprise

Tactical Implementation:

- Invite public audiences to participate in defining the look and feel of the updated brand

- Update the Smithsonian visual identity standards to make the brand more flexible and accommodating to today's digital needs

- Develop a domain URL strategy to facilitate marketing and promotion of the Smithsonian brand

- Develop a writing-style guide that emphasizes concise, friendly, action-oriented content

- Synchronize this strategy with the branding initiative currently under development. Communicate the Smithsonian's focus on learning and education to internal and external audiences

- Encourage and provide necessary support for staff to share their work and ideas directly with visitors though blogging, video, mobile platforms, geospatial data, and other Web and New Media formats

- Ensure that the new brand architecture is reflected in new Web initiatives such as the Smithsonian Commons (described in section IV. *The Smithsonian Commons: A Place to Begin*)

Goal 3: Learning

Facilitate dialogue in a global community of learners

Rationale

By increasing emphasis on the increase and diffusion of knowledge thr*ough online technologies, the Smithsonian* **c**an help create informed and educated 21st-century citizens and continue to fulfill James Smithson's founding vision.

Learning is the ruling passion that drives the Smithsonian's internal experts and attracts many of its external audiences. Learning motivates the Smithsonian's effort to provide context for the American and

global experience by helping us better understand ourselves through the lenses of history, culture, science and art.

But the models of learning that defined our nation's progress through the 19th and 20th centuries are changing with dramatic speed, influenced by rapidly evolving technology tools and the new cultural patterns that come with them. This is not to suggest that the old models of learning are irrelevant or inoperative, far from it. But the emergence of a new class of learning techniques—built on a foundation of broad and unrestricted access to information, social sharing, creativity, play, and participatory learning—supplement those standard protocols and enable vast new audiences to use the Smithsonian as one part of their lifelong learning journeys.

Policy/Program Goals:

Dialogue: Acknowledge the crucial role that interactive dialogue plays in the learning process and provide opportunities for it to grow on Smithsonian and external sites

User-Generated Content: Embrace user-generated content as an important catalyst to engagement and inquiry, particularly for younger and more "Web 2.0" kinds of audiences

Narratives: Develop programs that emphasize the role of storytelling

Digital Learning: Become a leader in the creation of digital learning environments through virtual worlds, virtual education conferences, gaming, mobile platforms, and a sense of exploration and play

Impact: Establish means of determining the impact of the Smithsonian's learning initiatives and a mechanism to share best demonstrated practices across the Institution

Tactical Implementation:

- Develop a plan to emphasize learning and its outcomes across the Smithsonian's digital initiatives

- Develop a program of audience research to inform decisions and analyze results. Develop an understanding of audience types and their learning goals

- Provide resources and establish policies that encourage the incorporation of user-generated content. Connect Smithsonian content, experts, and dialogue with users of Smithsonian and external social networks

- Develop programs that support the *learning journey* through Smithsonian exhibitions, collections, research, expertise, and related communities

- Support continued development/experimentation with digital learning environments and increase connections between those environments and the rest of the Institution's digital content, research, and communities

Goal 4: Audience

Attract larger audiences and engage them more deeply in long-term relationships

Rationale

For generations, people have been drawn to Smithsonian exhibitions. These exhibitions create memorable experiences by encouraging close observation of artifacts, and presenting interpretation through exhibition texts, sometimes supplemented with catalogs and/or educational programs. This observational learning model has been largely replicated in the Smithsonian's current online museum experiences as most sites continue to adhere to a relatively conventional content publishing paradigm.

The Smithsonian online experience should be a means of extending the experience of those who visit the physical exhibits, as well as a means of engaging more deeply with audiences unable to visit in person. Web publishing fundamentals—excellent content, strong Smithsonian-wide search, a cohesive information architecture, and a coherent navigation structure—are critical to reaching this goal. The online experience must become more interactive and able to facilitate ongoing dialogues between the Smithsonian and its users to ensure the continuing relevance of the Institution, particularly to digitally attuned audiences.

Policy/Program Goals:

Audience Profiles: Develop a clear understanding of the audiences who interact with the Smithsonian online, including their interaction goals and unmet needs

Web Publishing Fundamentals: Acknowledge the criticality of search results, findability, and other fundamental aspects of the user experience

Extended Relationships: Develop interaction mechanisms that encourage museum visitors to start—and continue—their Smithsonian experience online and through mobile devices

Smithsonian Commons: Re-imagine the experience of the Smithsonian portal to become the *Smithsonian Commons*, a place where communities of learning gather and grow

Tactical Implementation:

- Strive for excellence in Web publishing fundamentals. Invest in search and findability, "social search," information architecture, and overall usability. Make it easy for online visitors (as well as internal scholars and researchers) to find the content they are, or might be, interested in. Once visitors find content, make it easier for them to find similar and related content elsewhere in the Institution

- Publish more of our collections, images, video, activities, and content of all kinds. Enable *network effects* in which a critical mass of content and users enables kinds of learning and value-creation that many smaller, isolated pockets of content and users can not

- Ensure that Smithsonian content is available in a variety of formats and platforms (Smithsonian Institution and non-Smithsonian Institution)

- Create a shared global navigational structure that encourages deep exploration of unit-based content and discovery of content across units

- Develop expertise in User Experience Design. Convene focus groups to help staff and leadership better understand audience needs. Create an audience segmentation plan that describes and prioritizes roles, online goals, and value to the Smithsonian, and correlate that plan to the structure/interaction flows of Smithsonian Web sites

- Continue and strengthen an online pan-Institutional calendar to aggregate upcoming events and announcements

- Publish content so that it can be shared, tagged, collected, rated, re-purposed, commented on, and exported to other Web sites. Optimize Smithsonian digital content with meta data and semantic structure to maximize availability to search engines

- Dedicate resources to manage and support user interaction and user-generated content, Institution wide

- Redesign the main si.edu Web site and use the Smithsonian Commons as the basis for a pan-Institutional site structure that demonstrates the NEW Smithsonian online experience (see section IV. *The Smithsonian Commons: A Place to Begin*)

Goal 5: Interpretation

Support the work of Smithsonian staff

Rationale

Interpretation and explanation are the basic building blocks of learning: They are at the very core of the Smithsonian's research traditions. The Smithsonian has long excelled at harnessing human curiosity about the origins of the universe, the evolution of life, and human diversity and culture. But according to many stakeholders, the public is largely unaware of the depth, breadth, complexity, and importance of the Smithsonian's research activities.

Web and New Media technologies are crucial to the Smithsonian's core research activities and to the wide collaborations that must occur among geographically distant participants, but many staff members have insufficient support and training to use Web and New Media tools. These technologies are key to advancing many research initiatives, to achieving a broader distribution of the Smithsonian's intellectual products and to raising public awareness of the importance of research to the Smithsonian's mission.

Policy/Program Goals:

Balance: Ensure that the Institution's experts have access to the technology, training, and resources to support both the increase and diffusion of knowledge

Support: Create a pan-Institutional platform with standardized protocols to facilitate broad communication and collaboration among Smithsonian researchers, scientists, curators, and their internal and external audiences

Transparency: Encourage Smithsonian knowledge creators to expose their research to public audiences and invite collaborative inputs

Accessibility: Identify expert voices among the Smithsonian's staff and share their expertise and passion through Web and New Media tools

Public Outreach: Communicate the depth, breadth, and quality of the Smithsonian's research initiatives to internal and external audiences

Tactical Implementation:

- Implement SharePoint collaboration intranet and extranets
- Evaluate the technology-related support and training needs of Smithsonian's researchers/scholars/experts
- Provide incentives and resources to support collaboration and the sharing of research. Develop a pool of internal consultants and support staff—a *center of excellence*—to support the core work of Smithsonian experts and Web and New Media practitioners
- Highlight and encourage public engagement with Smithsonian research and researchers through new and existing blogs, Web sites, mobile platforms, geospatial information, and other channels

Goal 6: Technology

Develop a platform for participation and innovation

Rationale

The word "platform" is used in this strategic goal to advocate for a particular kind of technology in which a central entity creates a set of standards, tools, and interfaces that others can use to do meaningful work. Successful platforms can be built incrementally though the strategic alignment of many separate, small, useful components.

The Smithsonian innovates and experiments with Web and New Media technologies across the organization. This innovation occurs despite barriers caused by internal bureaucratic processes and the absence of dedicated funds to support IT innovation and development over time. While individual

instances of innovation may flourish, such practices are not being replicated efficiently, or applied to pan-Institutional challenges, resulting in missed opportunities and duplication of effort.

Smithsonian stakeholders expressed differing views of the benefits and risks of centralizing versus decentralizing Web and New Media IT services. Many Smithsonian Institution stakeholders appear to favor some form of a shared-services model that incorporates the benefits of decentralization while reducing the risks of too much centralization. This is harmonious with the principle of balancing "innovation at the edges" with a commons in the middle.

Many of the menial or difficult tasks performed by unit Web and New Media teams—and the public— can be served by a unified Smithsonian platform, and the development of a shared platform, over time, will allow data, ideas, e-commerce, and collaboration to flow across institutional boundaries in ways that are not possible in the current decentralized model.

Policy/Program Goals:

Platform: Inventory all Web and New Media tools/functionality and determine the core set to be provided as a shared- solution platform. (Should include enterprise applications like e-commerce, online donations processing, customer relationship management, search, analytics, and social networking.)

Mobile: Support the growing role of mobile devices, and configure Smithsonian sites and exhibitions for availability to wireless/handheld devices

Support Services: Recruit and train a core Web support team to develop technology solutions that can be made available to units on a free and/or cost-chargeback basis

Analytics: Work with units to establish success criteria for individual site performance. Collect, analyze, and communicate accurate and timely data to all units

Tactical Implementation:

- Establish clear roles and responsibilities for the development and operation of a platform and shared-services model

- Evaluate the most pressing technology support requirements across all units and recruit a core team with skills to match the unit needs

- Coordinate with digitization strategy by taking input on needs/means for internal/external information sharing

- Use best practices in metrics and analysis to understand the dimensions of audience engagement across Smithsonian Institution and external sites, mobile platforms, in-exhibit multimedia, etc. Validate accuracy of all Web usage statistics and build skills necessary to use data

- Implement technologies such "browse paths" (or "breadcrumbs") to encourage broader and deeper avenues for site exploration

- Provide tools to share research and collection data

- Implement a mobile-friendly version of the Smithsonian Web site and mobile-friendly templates for new development

Goal 7: Business Model

Increase revenue from e-commerce fundamentals and Web 2.0 perspectives

Rationale

The Smithsonian's basic business model is to create social and economic value through the increase and diffusion of knowledge. Web and New Media programs are both an intrinsic part of this overarching model and an opportunity to develop new kinds of revenue in harmony with the mission. The Smithsonian's current Web and New Media portfolio includes numerous separate transactional Web sites offering products, services, memberships, and tickets from isolated systems. While each of these systems may be sufficient for their individual tasks, the fact that they are not conceptually or technically integrated makes them more expensive to build and maintain, diminishes the user experience, and undercuts the Smithsonian's ability to understand, serve, and grow the audience as a whole. By neglecting to present desirable e-commerce opportunities to visitors, and failing to understand visitor needs and interests, the Smithsonian loses countless opportunities to build loyalty and generate revenue every day.

Emerging from the Smithsonian's 2.0 thinking is the potential for a new revenue model based on users and content. Amazon's success is linked to the way it harnesses the collective intelligence of its huge base of users through recommendations and rankings. Google develops powerful information-access tools, then gives them to its users—*for free*—and makes billions by selling ads. In these models, the revenue-generating potential of a Web site is exponentially amplified by the size and activities of its audience. A Smithsonian digital audience 100-times larger than today's can open up countless revenue opportunities that just are not financially feasible now. Ultimately, the most valuable business asset we can cultivate—and the one that is most fundamental to our core mission—is a community of engaged and committed Smithsonian enthusiasts.

Policy/Program Goals:

Revenue Generation: Use a coordinated approach to revenue generation across the Institution

Incentives: Establish a model that offers units incentives to participate in business development. These include increased revenue share, visibility, traffic, and access to shared tools that reduce labor and costs

Success Metrics: Require that business plans be created to evaluate the cost/benefit profile of proposed online revenue-generating initiatives and ensure that business owners track performance against that plan

Revenue in Harmony with Mission: Develop opportunities that are efficient and scalable and that harmonize with the overall mission to increase and diffuse knowledge

Marketing and Promotion: Create pan-Institutional and museum-specific online marketing campaigns to drive site traffic and grow audiences for content, philanthropic, and e-commerce purposes

Audience Development: Focus on creating dramatically larger and more engaged audiences by providing consistently outstanding content, experiences, and engagement across all Web and New Media properties

Tactical Implementation:

- Implement a shared e-commerce and online fundraising platform as a pan-Institutional resource and manage it as a partnership, providing incentives for units to participate (revenue share, cost avoidance, productivity, etc.). Use best practices for measurement and analysis of all revenue-generating activities

- Create/maintain a pan-Institutional customer resource management system for members, customers, prospects and other audiences to maximize the lifetime value of each through a system of contact, solicitation, and promotion management

- Establish a policy and framework for selling corporate/institutional sponsorships on Smithsonian Web sites and mobile platforms

- Enable Smithsonian Web visitors to shop, donate, become a member, or register for e-mail updates from every page, and promote Smithsonian membership opportunities from all Institutional Web sites

- Establish a plan to accept individual micro-donations online that can be earmarked for specific museums, programs or content

- Increase the level of integration between offline (direct mail, telemarketing) and online fundraising

- Develop expertise in mobile development (e.g., cell phones, iPhones) and evaluate long-term revenue potential of the mobile platform

- Explore a "freemium" business model (offering some services for free while charging for special features/products) using the Smithsonian Commons as a test bed (see section IV. *The Smithsonian Commons: A Place to Begin*)

- Explore the feasibility of creating in-museum digital experiences (e.g., mobile tours, virtual-reality games) with appropriate fees

Goal 8: Governance

Design and implement a pan-Institutional governance model

Rationale

Governance is the kinetic exercise of management policies related to decisions that define expectations, grant power, or verify performance within an organization. The Smithsonian Institution operates in ways that are arguably unique and distinct due to its unique trust status, making direct comparisons with similar entities difficult, if not impossible. The Smithsonian lacks governance policies for many online and digital media issues and does not always exercise those policies it does have consistently across the Institution. Stakeholder governance concerns tended to group on three main topics: broadly felt ambiguity around questions relating to content in general (ownership, publishing approval workflows, etc.) and restrictions relating to usage and/or licensing of content for online distribution; concerns relating to the use of social networking tools in general, and restrictions for posting Smithsonian Institution content to platforms like Facebook or YouTube; and the absence of accurate measurement tools, metrics, and financial data relating to the use of Web and New Media technologies.

Web and New Media technologies that are supported by some level of centralized platform will require well-reasoned and well-articulated governance policies to ensure their ultimate success within the Smithsonian Institution's mission and government charter.

Successful governance and leadership are the keys to accomplishing *any* of the goals in this strategic plan.

Policy/Program Goals:

Policy: Create a policy and governance model that addresses roles and responsibilities for centralized and unit activities, and determines the means by which centralized technologies, support, and oversight are administered over time

Content Usage: Establish a pan-Institutional policy for sharing and using the Smithsonian's digital content, with particular focus on Copyright and Public Domain policies that encourage the appropriate re-use and sharing of Smithsonian resources

Budget: Coordinate inputs to pan-Institutional budgeting processes to ensure that Web and New Media activities are funded in accordance with their importance to the institution

Legal Compliance: Define policies and procedures to secure approvals for online publishing and participation in social networks

Tactical Implementation:

- Determine where in the Smithsonian structure the governance function should be housed and who should manage it. (See also "Recruit a pan-Institutional Web and New Media leader and give that person the decision-authority and visibility to lead change" in Goal 1: Mission)

- Develop a resource and staffing plan to lead and execute the Web and New Media strategy and ensure that adequate resources are included in budgeting at the centralized and unit levels

- Set intellectual-property policy with particular focus on Copyright and Public Domain. Review and approve the draft directive for Digital Asset Access and Use

- Review and approve draft Smithsonian Directive 950: *Web Management* (which describes internal policies for various aspects of Web operations)

- Review and approve draft policy for participation in social networks

IV. The Smithsonian Commons: A Place to Begin

Overview

A digital Smithsonian Commons unifies the themes and goals articulated in this strategy.

The Smithsonian Commons will be a special part of our digital presence dedicated to the free and unrestricted sharing of Smithsonian resources and encouraging new kinds of learning and creation through interaction with Smithsonian research, collections, and communities.

The digital commons movement is just a few years old but the concept of a commons is quite old. Commons are usually created when a property owner determines that a given set of resources—grass for grazing sheep, forest for parkland, software code, or intellectual property—will create more value if freely shared. Our understanding of research, education, artistic creativity, and the progress of knowledge is built upon the axiom that no idea stands alone, and that all innovation is built on the ideas and innovation of others. The Smithsonian community has always championed these ideals.

The initial Smithsonian Commons will be a Web site (also designed for mobile devices), perhaps http://www.si.edu/commons, featuring collections of digital assets contributed voluntarily by the units and presented through a platform that provides best-of-class search and navigation; social tools such as commenting, recommending, tagging, collecting, and sharing; and intellectual-property permissions that clearly give users the right to use, re-use, share, and innovate with our content without unnecessary restrictions.

The architecture of the Smithsonian Commons will encourage the discovery of content deep within Smithsonian unit Web sites and will expose connections and commonalities across Smithsonian projects. The Smithsonian Commons will also be a platform for formal and informal collaboration and content sharing inside and outside the Institution. Through these features—collection access, sharing, social tools, and user-generated content—the Smithsonian Commons will bring together the component pieces of the updated experience, updated learning model, and balanced approach to management and governance that are the foundational themes of this Web and New Media Strategy.

Incremental Development

The Smithsonian Commons will be developed incrementally through a series of prototypes and public pilot projects designed to test and refine business models and impact on mission and audiences. The first of these pilot projects has already taken place: The Smithsonian's participation in the Flickr Commons project demonstrated the potential of providing open access to multiple Smithsonian collections through a best-of-class social-media platform, and the SIRIS (Smithsonian Institution Research Information Service) cross-site search project demonstrates the power of providing a single point of access to Institutional collections and the increase in traffic that such utility creates. The Smithsonian's SharePoint project and intranet redesign are demonstrating the positive effects of an improved end-user experience and a shared collaboration platform on information access and internal collaboration.

The first iteration of a Smithsonian Commons could be as simple as images of a few carefully chosen Smithsonian artifacts with links back to their collecting units and labels that clearly give the public permission to use and share the images however they see fit, as long as the Smithsonian is properly credited. Additional features such as commenting and collecting, and experiments with micro-donations, e-commerce and sponsorships, would be added one at a time and designed so that they could be used not just on the commons but independently throughout Smithsonian Web sites. Some tools would be developed to help non-Smithsonian bloggers, researchers, educators, and enthusiasts expose Smithsonian content on their own Web sites.

Precedents

Though the Smithsonian's unparalleled collections and expertise would make the Smithsonian Commons unique, there are several important precedents to this initiative. These projects have proven the positive influence of open-access and community dialogue on engagement, learning, creativity, and knowledge creation.

- The Creative Commons and related Science Commons and ccLearn organizations encourage new kinds of sharing and reuse by providing alternatives to traditional copyright
- The Flickr Commons increases engagement with public photography collections around the world
- The Internet Archive creates and aggregates free, reusable content of all kinds, including 1.2 million digital books
- The National Institutes of Health PubMed Central publishes publicly funded research results in a public domain archive
- MIT Open Courseware provides free access to over 1,800 courses from MIT's curriculum
- IBM's Patent Commons initiatives encourage scientists and engineers to develop the unrealized potential of a large group of IBM's technology patents

These precedents, and a detailed rationale for the commons, are described in
Imagining a Smithsonian Commons: http://www.slideshare.net/edsonm/cil-2009-michael-edson-text-version

Benefits

Reshaping our digital identity around the concept of a Smithsonian Commons addresses many of our fundamental challenges.

Brand: The concept of a commons brings cohesion and clarity to the Smithsonian's vast online offerings.

Audience Growth: Through the Smithsonian Commons we can seed the Internet with high-value content and use social networks to increase the relevance and value of our work. Audiences—especially digitally savvy audiences and younger visitors—will immediately understand and respond to the idea of a free Smithsonian Commons. Improved content, features, and clarity can drive audience growth.

Unified Operations: A voluntary Smithsonian Commons built on transparency and trust—and supporting rather than competing with the works of the individual units—provides an excellent alternative to working in silos.

Education: Planning next-generation learning programs is an Institutional priority. A commons can serve both as a collaborative workspace used to create learning programs and a clearinghouse to distribute and improve them.

Research: Smithsonian researchers need private, semi-private and public collaboration and information-access platforms to advance and share their work. Aggregating these services into a commons provides a stable base and opens the door to new kinds of cross-disciplinary investigations.

Revenue Generation in Harmony with Mission: Attempting to directly monetize access to, and use of, museum content does not appear to be a sustainable business model. Through these low-margin business practices, we alienate users, perpetuate the practice of institutions charging each other, discourage research and publications, and undermine our civic mission. The commons presents an alternative: gradually reduce our dependence on access and use fees by aggregating larger number of visitors under a strong brand supported by sponsorships and other value-added products and services. It is likely that the Smithsonian will make more money by promoting "free" resources to a large audience than it can make charging small amounts for small transactions to a small audience, and it is a much better fit with the mission.

Leadership and Legacy: Championing free and open content and asserting the critical role of public institutions in stimulating innovation and knowledge creation would define the Smithsonian as a leader. Science, education, creativity, and civic discourse are all headed towards a participatory commons model.

Policy/Program Goals:

Findability/Connections: Demonstrate a model that improves the findability of Smithsonian resources and allows learners to expose and explore contextual/thematic relationships across the Smithsonian

Democratize Access: Demonstrate the power of democratizing access to information through a shared commons platform that encourages personal exploration, creativity, and innovation

Brand: Assert the relevance/excitement of the Smithsonian brand by highlighting the depth and vitality of our work and collections

Learning: Demonstrate the ways in which open access and shared tools support formal education and facilitate self-directed learning for people of all ages

Balance: Demonstrate that a shared platform, developed through a trusted partnership among stakeholders (and the public), can successfully balance internal concerns about authority and control

Funding: Use the commons to attract the funding necessary to update the Smithsonian's Web and New Media operations and business models

Tactical Implementation:

- Seek informational meetings with leading foundations (that have supported commons and open-access initiatives in the past) to gauge interest in supporting a Smithsonian Commons and new models of learning and engagement

- Evaluate current revenue streams derived from digital image access/use and develop an evidence-based business plan for a commons

- Develop a prototype of the Smithsonian Commons to test assumptions and provide a tangible demonstration of the concept for fundraising and evangelization

- Solicit input from our Smithsonian 2.0 "digerati" and develop a core group from a variety of disciplines to help shape and build external support for the commons

- Explore the connection between the digital Smithsonian Commons and the emerging program goals for the Arts and Industries Building, National Museum of African American History and Culture, and other Institution initiatives

Appendix

1. Committees

This strategy was reviewed by the Smithsonian Web and New Media Steering Committee

- Betsy Broun
- Zully Dorr
- Michael Edson
- Lauryn Guttenplan
- Evelyn Lieberman (co-chair)
- Carolyn Martin
- Thomas Ott
- Cristián Samper
- Ann Speyer (co-chair)

A working group of Web and New Media practitioners helped write the strategy and provided guidance, oversight, and support during the strategy-creation process

- Riccardo Ferrante
- Vanessa Harbin
- Dennis Hasch
- Martin Kalfatovic
- Effie Kapsalis
- Matthew MacArthur
- Carolyn Martin
- Michelle McMahon
- Darren Milligan
- Jennifer Northrop
- Victoria Portway
- Nancy Proctor
- Jennifer Rossi
- Dennis Smoot
- Sara Snyder
- Katherine Spiess
- Cheryl Wilson

Michael Edson directed the strategy-creation project. Leo Mullen (CEO, Navigation Arts) was the principal external consultant.

Appendix

2. Inputs from the Pan-Institutional Strategy

Insight from the pan-Institutional strategy process (thanks to David Allison) confirmed many themes and directional shifts expressed by participants in the Web and New Media strategy workshops:

What's Out	What's In
Stability/stodginess	**Change**
Scholarly independence	**Strategic direction**
Increase and diffusion is enough	**Must add relevance, wisdom, inspiration**
Corporate orientation	**Educational orientation**
Focus on buildings	**Focus on programs**
Curators as experts	**Curators as collaborators and brokers**
Monographs	**Stories**
Web 1.0	**Web 1.0, 2.0, 3.0**
Unit or discipline orientation	**Pan-Institutional orientation**
Growth and expansion	**Sustainability**
Diversity based on single identities (black, white, Asian)	**Complex-identity diversity (multi-racial, multi-ethnic)**
Boomers and their issues	**Millennials and their issues**
Brand promotion	**Brand respect and trust**
Control	**Collaboration**
National identity and pride	**Global identity and humility**
The real thing	**The real thing plus digital representations**
Our Smithsonian	**Everyone's Smithsonian**
Federal government as dominant sponsor	**Public-private balance**

Appendix

3. Web and New Media Business Requirements

In conversations with more than 294 Smithsonian Institution (SI) stakeholders representing 55 units, the following were identified as crucial for the success of the Web and New Media strategy:

- Strengthen the overarching SI brand and its relationship to unit brands
- Clarify Institutional priorities and reflect them online
- Better support the goals and needs of SI audiences
- Support the core mission to increase knowledge and become much better at diffusing knowledge
- Increase the availability of SI's knowledge to audiences worldwide
- Provide better connections between researchers and those who use research
- Increase the relevance of SI to younger audiences
- Strengthen the Institutional focus on education (and better define what that means)
- Provide new learning experiences that make education fun and engaging
- Provide means and opportunities for SI to facilitate communities of learning and the *learning journey*
- Provide new tools and techniques for telling compelling stories related to our collections and research
- Make available more of SI's artifacts and assets in digital format
- Make SI-wide content easier to find, understand and share
- Make SI available to audiences through mobile devices
- Extend and enrich the in-museum experience with online interaction
- Stimulate greater levels of funding and staff resources to support Web and New Media initiatives
- Enable SI staff to create new online experiences more easily and inexpensively
- Leverage online technologies to create new revenue sources
- Get the bureaucracy out of the way of doing business
- Clarify the rules of operation and governance around online initiatives
- Provide a core platform that can easily and effectively support the creation of innovative programs
- Develop comprehensive, pan-Institutional data to measure investments in and use of digital technologies
- Make the cost of IT infrastructure and operations more visible to senior management
- Provide better metrics and analytical data about how audiences interact with SI

Appendix

4. Project Methodology

This Web and New Media Strategy was created collaboratively through a series of facilitated workshops with representative stakeholders of the Smithsonian Institution. Stakeholders were invited to participate in one or several of the workshops depending on their area of expertise and or interest. Each workshop had a specific theme that served as the basis for discussion and debate. The workshop themes included:

- Education

- Business Model

- Technology and Operations

- Curatorial and Research

- Directors' Perspective

Each of the workshops and planning sessions were documented by a real-time transcription of the proceedings posted to a wiki established for this purpose (http://smithsonian-webstrategy.wikispaces.com). The main intent of the workshops was to move relevant information to the wiki where it could be openly evaluated, sifted, weighed, and considered by all. The wiki was the platform on which this strategy was sketched, discussed, debated, refined and finalized, all within the view of those who care most about the Smithsonian.

The inputs from these discussions were filtered to inform both the long-term "aspirational" goals of the Institution, as well as to identify the most achievable short-term tactical implementation of the new strategy. Ideas were evaluated by comparing them to the project goals and prioritized by their perceived impact on Smithsonian audiences, level of effort to execute, and their potential to stimulate transformational change across the Institution.

The workshops included more than 294 Smithsonian stakeholders from 55 museums, research centers and business units.