

Succession Planning for Cultural Institutions

Part 2: Resource Roadmap

Conservation Center for Art & Historic Artifacts Webinar
July 10, 2024





Conservation Center for Art & Historic Artifacts



In a typical year:

- Preservation Services specialists complete over 50 survey projects.
- Approximately 60 CCAHA-sponsored workshops, conferences, webinars, and training sessions are presented.
- The Digital Imaging Services staff digitizes thousands of pages of fragile archival documents, books, and photographs.
- Conservators assess and treat more than 6,000 individual artifacts, from over 400 clients.
- Housing & Framing Services house approx. 75% of the artifacts treated (folder, sleeve, box, mat and frame, or sealed package).



The Performing Arts Readiness Project



www.performingartsreadiness.org

PAR Resources

Services to Reach:

- Producing and presenting organizations
- Organizations with and without facilities

Outreach and
Community
Engagement

Information
Resources

Circuit Rider
Project

Templates and
Tools

Training and
Conference
Programming

Disaster Networks
& Disaster
Planning \$

Special Focus since 2020 on:

- Festival Safety
- Arts Administration Programs
- Emergency Management Programs (2023)





CCAHA

@cacha3300 · 1.88K subscribers · 133 videos

CCAHA is a nonprofit conservation center in Philadelphia. Our conservators repair and sta...more

cacha.org

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Home Videos Playlists



Conservation Center for Art & Historic Artifacts

2,578 views · 4 years ago

When April Chatman-Royce's grandmother gave her a collection of family documents—photographs, books, and patents—she didn't know where to begin. A friend told her about the Conservation Center for Art & Historic Artifacts (CCAHA). This film tells the story of the treatment of her family archive, from the initial accession appointment to the final pickup.

...
[READ MORE](#)

For You



Succession Planning for Cultural Institutions, Part One: Research Findings



Legal Issues in Collections Care: Abandoned Property



Glove Actually: Confident Decision Making in Artifact Handling

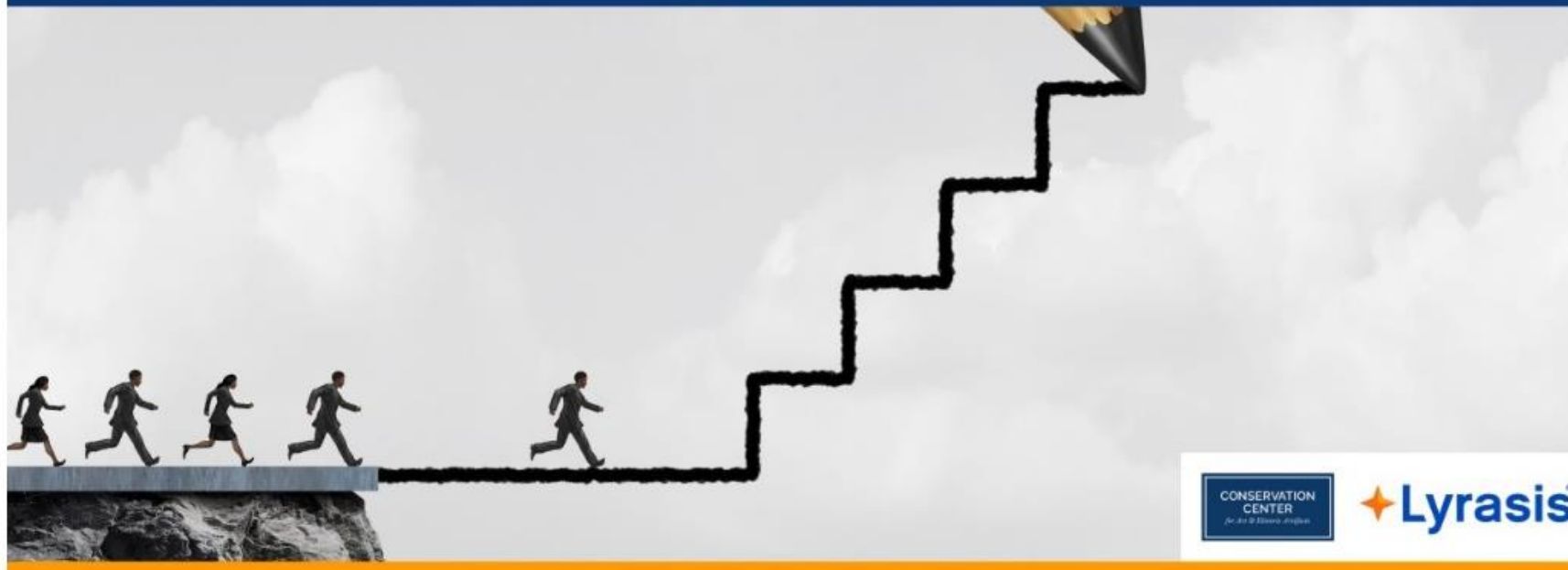
Project Recap

- The Conservation Center for Art & Historic Artifacts (CCAHA) and Lyrasis are serving the country's museums, historic sites, archives, libraries and arts organizations by creating a **suite of resources** focused on succession planning for collections care staff and arts administrators.
- CCAHA and Lyrasis will also offer educational programs to present “**good practice**” strategies to prepare for inevitable staffing and volunteer transitions in the area of arts administration and collections care.
- Work completed includes **listening sessions** and a **project survey** to learn about the nuances of succession planning strategies that have—and have not—achieved positive results at arts and cultural institutions.
- A **National Advisory Panel** has supported the project team. **Reviewer volunteers** are testing the draft resources.

Timeline

- ❖ February-October 2023: listening sessions
- ❖ September 2023: Survey distributed throughout the field to collect data on current succession planning practices
- ❖ November 2023: Survey and listening session analysis
- ❖ Fall 2023/Winter 2024: Resource development & testing
- ❖ 2024: Webinars, conference presentations to disseminate results/resources
- ❖ 2024: Website devoted to the project launched
- ❖ 2024: Continuing Development of Resources

CULTURAL STEWARDSHIP SUCCESSION PLANNING INITIATIVE



CULTURAL STEWARDSHIP SUCCESSION PLANNING INITIATIVE

<https://ccaha.org/succession>

Tools and templates

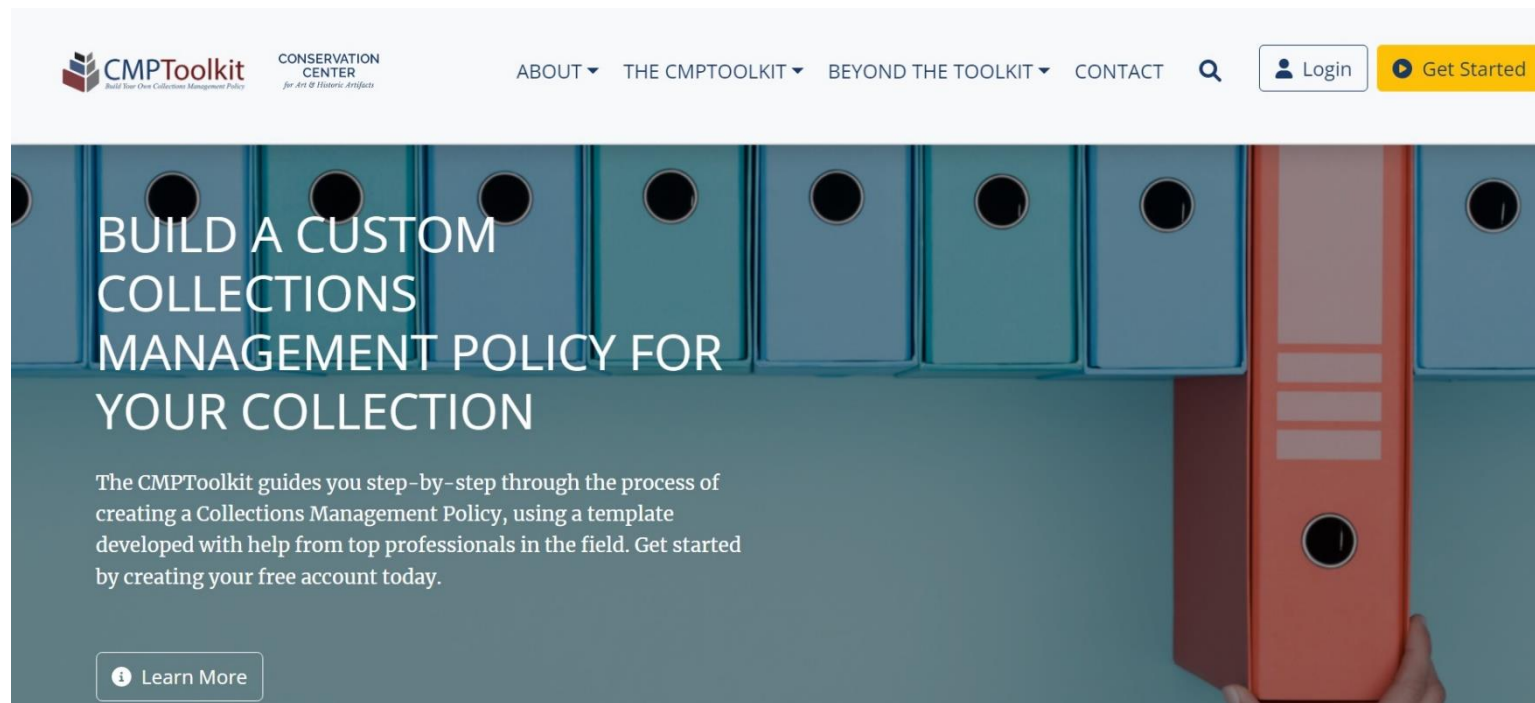
- [RACI Chart for Succession Planning](#)
- [Job Analysis for Succession Planning](#)
- [Succession Risk Advocacy Matrix](#)

Guides and written resources

- [5 Key Questions Board Members Should Ask About Staff Succession Planning](#)
- [Top 10 Things You Can Do NOW To Support Succession Planning & Staff Transitions](#)
- [Oral History Knowledge Transfer Guide](#)
- [Calendar for 30-60-90 Days After Starting a New Job](#)
- [File Naming Strategies to Aid in Succession Planning](#)
- [Essential Written Plans, Policies, and Procedures for Collections-Holding Institutions](#)

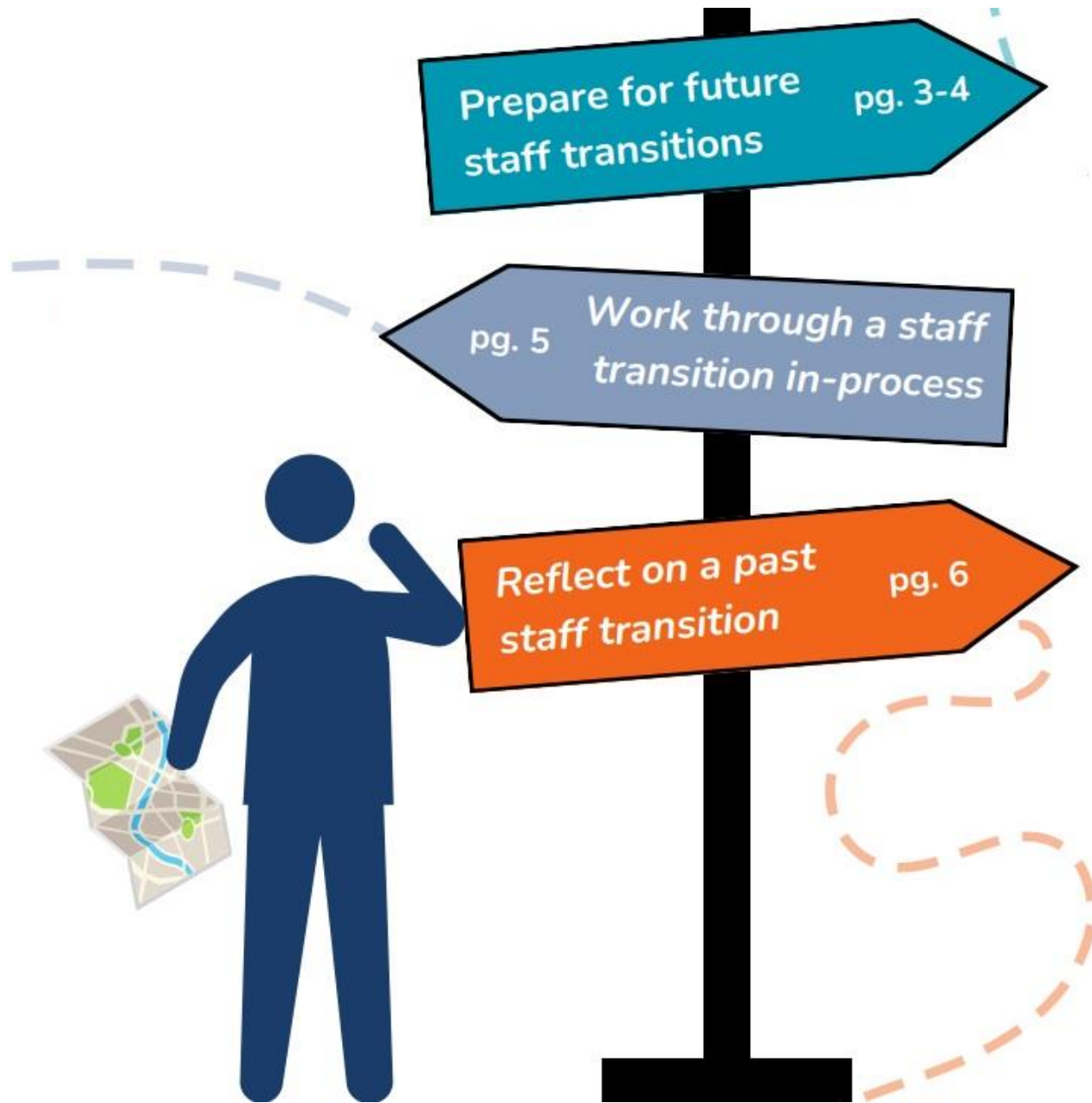
Additional resources

- [Cultural Succession Planning Bibliography](#)
- [Collections Management Policy Toolkit](#)



The screenshot shows the homepage of the CMPToolkit website. The header includes the logo for CMPToolkit (Conservation Center for Art & Historic Artifacts) and navigation links: ABOUT, THE CMPTOOLKIT, BEYOND THE TOOLKIT, CONTACT, a search icon, a Login button, and a yellow Get Started button. The main content area features a background image of teal and orange binders. The headline reads "BUILD A CUSTOM COLLECTIONS MANAGEMENT POLICY FOR YOUR COLLECTION". Below this, a paragraph states: "The CMPToolkit guides you step-by-step through the process of creating a Collections Management Policy, using a template developed with help from top professionals in the field. Get started by creating your free account today." A "Learn More" button is located at the bottom left of the main content area.

Succession
Planning
Resource
Roadmap



Questions?

- How might these resources be helpful for your organizations?
- What additional sorts of resources might be useful?
- What information do you wish you had on succession planning? What networks of colleagues do you have, or wish you had, on this topic?

Contacts - www.ccaha.org/succession

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