

Abstract

Archaeologists have been early adopters of digital technologies relative to other heritage-related professions. But how often are their online communications initiatives informed by audience-based strategic intention? The pervasiveness of online tools makes engagement ever easier, and as a result, a less meaningful measure of influence. Conversely, planning for digital communications is often an uncomfortable and intensive process that results in more effective online initiatives by clarifying audiences and expectations. The following pages will illustrate effective strategic planning approaches for organizations that seek to advocate for heritage resources through the web. Methods examined will include the development of measurable tactics to gain internal buy-in, leverage online partnerships and determine appropriate engagement tools.

Emerging Strategic Approaches

In 2013, strategic planning for the web and digital media is still a rarity among heritage organizations. Often, the preferred approach is to nurture innovative ideas ahead of audience needs, or the sustainability of the approach over time. The web, digital libraries social media and mobile tools provide effective platforms for heritage advocacy, but truly leveraging these technologies means continually re-anchoring them with strategic context over the course of time. At the core of strategic concerns for digital heritage on the web are considerations of audience outreach, providing authentic interpretive experiences online, and establishing foundations for future “born digital” data. While these concerns are frequently addressed as separate issues, the effectiveness of each is highly dependent on sustainably the systems interrelate. Ultimately, digital strategy is by, and for, people—from planning to consumption. The key to successfully translating good ideas and intentions for outreach through the web and digital media is to develop them into more defined goals, objectives and tactics that can be measured for mission-based results among audiences. Illustrative elements from the strategic plans of the following heritage organizations and programs will be examined:

- Chemical Heritage Foundation, a non-profit organization focused on the history of chemistry. CHF houses a library, archives, oral history program, public museum, gallery of historic art, and visiting scholars program.
- National Center for Preservation Technology & Training, a U.S. National Park Service research and granting agency. NCPTT advances the use of science and

technology in historic preservation with programs in archaeology, architecture, landscapes and materials science.

- The Society for Historical Archaeology, a professional organization that promotes scholarly research and the dissemination of knowledge concerning historical archaeology. The society focuses on the identification, excavation, interpretation, and conservation of sites and materials on land and underwater.
- Michigan State University Campus Archaeology, a program that works to mitigate and protect the archaeological resources on MSU's campus.
- Royal Commission on the Ancient and Historical Monuments of Scotland (RCAHMS), Scotland's national collection of buildings, archaeology and industry.

STRATEGIC PLANNING COMPONENTS

The strategic planning process for heritage organizations generally evolves into three levels of focus: goals, objectives and tactics. This approach can be effectively executed regardless of the size, scope or resources of an organization.

Goals

Goals are simple, general statements that are rooted in mission. They are based on changing your organization's position in reputation, relationships or the work of accomplishing mission-based directives. They are vision statements about an organization's perfect world. They are also often the most difficult for organizations to articulate because they are impossible to ever quantifiably achieve. Because of their layered meaning, they remain evergreen and rarely need to be refashioned. Stating goals in present tense also serves as a motivational function.

Objectives

While goals function as an organizational compass, objectives define a time and place for recognizing a successful interim stop on the journey. Objectives are a critical success factor in strategic planning for digital planning for heritage organizations, but are rarely articulated because of the discomfort their specificity implies. They focus on inspiring measurable action, acceptance or awareness that make organizational goals a practical pursuit (Smith, 82-84). Eleven criteria define the ideal objective:

1. They support mission-based organizational goals for the organization.
2. They are focused on a specific audience.

3. They emphasize impact, not products.
4. They are rooted in research.
5. Their wording is semantically clear.
6. They are measurable.
7. They are time-defined.
8. They focus on one result from one audience.
9. They challenge the organization.
10. They are attainable.
11. They are accepted throughout the organization.

Objectives accomplish one of three outcomes. The first is awareness, or what audiences understand about an organization through simple transmittal of information. Objectives can also influence acceptance, or the emotional response felt by publics, which can foster advocacy, particularly in controversial situations. Finally, objectives can be used to inspire action for changing an existing behavior or adopting a new one.

It's easy to report web page hits and time spent visiting a site. Establishing if that is a value and then putting a number to it is critical to establish momentum. These numbers can be determined through evaluation of an organization's existing audience interactions or results achieved by similar organizations online. As the plan is updated and iterated over the course of time, a truer understanding of audience will develop and more targeted numbers can be assigned.

Tactics

Tactics are the tools, platforms and approaches identified in a plan that most efficiently interface with targeted audiences to accomplish organizational objectives. In social media, these may include Pinterest, YouTube, Facebook or Twitter.

CASE STUDIES

Michigan State University Campus Archaeology

The MSU Campus Archaeology Social Media Action Plan combined vision-oriented goals with an aggressive schedule of posting procedures for reaching targeted audiences.

Among its goals were to be seen as "the go-to authority for MSU's history" and "innovators and the authority on Campus Archaeology." Its targeted audiences included

Alumni, students, faculty, staff, and Lansing/East Lansing community. The plan emphasized integration of social media and including everyone who worked on any aspect of the program so that a consistent and frequent message was delivered to core audiences, while seeking to expand them as well, especially among staff and alumni. As a result, the program was recognized for its field school work with an AT&T Award for innovative teaching for combining digital and traditional media. The University subsequently reclassified the program as critical and recently made its budget a permanent line item. (Goldstein, 2012)

Society for Historical Archaeology (SHA)

The Social Media Subcommittee of the Society for Historical Archaeology created an outreach plan in 2011. The subcommittee sought to provide a resource for membership to interact regularly with the organization, and offer non-members insight into both SHA and the world of historical archaeology. The subcommittee's central tactic was development of collaborative blog that was supported by an aggressive community-building campaign on Facebook and Twitter. During 2012, 50 people contributed 125 posts. Followers on Twitter more than doubled to more than 2,800. Additionally, most of its 1,365 followers on Facebook liked the SHA page during that same period. (Brock, 2012)

The foundations for SHA's strategic plan were established by spring, just in time for the premiers of "National Geographic's Diggers" and Spike TV's "American Diggers." The blog and social media channels became the launchpad for SHA's response. President Paul Mullins proactively issued a public response to the shows, stating:

"These shows are disappointing, but we can continue to approach them as teaching moments and acknowledge that even thoughtful viewers may not immediately grasp the ethical shortcomings of such methods or understand what they risk losing in the hands of a haphazard metal detector survey. We do not need to surrender our preservation ethics or scholarly rigor, and while we may not transform everybody we can reach many thoughtful people who respect precise fieldwork, community scholarship, and responsible preservation." (Mullins, 2012)

SHA shared follow-up posts from its Ethics committee regarding the organization's conversations with National Geographic. It furthered the opportunity for "teaching moments" by featuring a Current Topics post from Matt Reeves, director of archaeology at Montpelier Foundation, who runs a workshop with metal detectorists. The post discussed his program and provided materials for working with this community in more proactive ways. By prioritizing the development of its digital platforms, SHA was positioned to take advantage of a media controversy to raise awareness, foster advocacy and inspire action among its identified publics. It provided members with instant, two-way communication

about how the organization was responding to an important issue while it supplied resources they could apply to their own work as it relates to a hot topic. At the same time, it presented the organizational position on these issues and promoted its available resources to the public and potential members. Four of SHA's top five blog posts them covered this issue, accounting for 15 percent of the blog's traffic for the year.

National Center for Preservation Technology & Training (NCPTT)

NCPTT's plan was developed in 2007, just as social media began to enter the popular mindset. Among agencies for the U.S. National Park Service, NCPTT is very small and remotely located in the small town of Natchitoches, Louisiana. Moreover, it's congressional mandate extended well beyond the National Park Service to include historic preservationists in general, giving the research it fostered in the technologies of preservation a global audience. The organization applied the Hoshin Kanri model of strategic planning to its digital efforts. It categorized its goals under the 11 focus areas of the Hoshin method: Content, Tools and Vehicles, Structure, Processes, Leadership, Partnership, Metrics, Internal Communication, Reputation/Impact, Role and Global.

Because so few of its peers were on the social web at that point, NCPTT's priority was to develop its internal savvy and build a library of digital media content that would engage early adopters in its audience and establish its authority in this area when the rest of its audiences followed. This goal was articulated under the Structure focus area as "A streamlined process empowers NCPTT staff to rapidly deliver media content directly to the web." The objectives under this goal included regular training by digital media experts, more autonomy for staff members posting content, and implementation of digital tools and platforms to make the posting process as simple as possible.

Throughout 2008, NCPTT shifted its digital infrastructure accordingly. The organization tracked digital media conferences taking place in nearby metropolitan areas to draw blogging and experts to its facility for staff training on the principles of blogging, online media editing and search engine optimization strategies. It repositioned its intranet from a static system of document links to a social media learning and sharing experience. It did this by creating an NCPTT FriendFeed group, which was embedded on the intranet's homepage. Bookmarklets were installed on staff member's browsers to allow immediate sharing and conversation about news items without the need to broadcast links through email. This provided a safe place for them to acquire online posting and conversational skills. To reinforce the promise of the Web 2.0 revolution among the organization's laggards, communications staff continually posted news articles about social media's

burgeoning impact to the FriendFeed room. This tactic cost no money, required little time for implementation and readied staff members for engagement on then-emerging platforms like Facebook and Twitter.

A more celebrated objective under this goal in NCPTT's strategic plan was its migration from a proprietary CMS for its website to the open source version of WordPress. It was among the first U.S. government agencies to make such a leap. With the proprietary CMS, content had to be submitted to the webmaster to post. WordPress' intuitive interface and built-in search optimization functions allowed staff to post high-impact multimedia content directly to the site. By the end of 2009, NCPTT was featured as Government Video Magazine's "Website of the Week," citing the National Center's use of "photos, videos, podcasts and every other modern method to demonstrate [its research]." Additionally, tech blog Honeytech named the website number four on its international listing of "Top 10 Government Sites Powered by WordPress." The WordPress organization also chose NCPTT as one of eight U.S. government sites featured in its Showcase for outstanding implementation of the CMS (NCPTT, 2009). The success of this migration led to other agencies within the National Park Service's Cultural Resource Program to consult with NCPTT regarding their digital strategies.

Royal Commission on the Ancient and Historical Monuments of Scotland (RCAHMS)

RCAHMS began its digital media planning by embracing the promise of technological and social openness even while it undertook a frank examination of its limitations toward achieving that promise. The planning process started by a "challenge group" comprised of representatives from each department throughout the organization. The group first crafted a description of social media that would communicate its potential to others in the organization. It then set out to link that potential to Strategic Priorities previously identified by the organization. The group called for relaxed editorial guidelines in keeping with more authentic engagement on social media platforms and drafted a one-page common sense policy for using social media. It also emphasized principles of public interaction with its collection through crowdsourced content opportunities, user-generated tagging and integrated data systems. Notably, it also emphasized a spirit of fun and experimentation in approach not characteristic in the heritage field:

"We should be prepared to experiment before we get it right; this is a new way of working, and it will be new for some of our audiences too, we should be prepared to try a few things to get it right. As this is such a new and fast changing media we should be very responsive to change and constantly redevelop our strategies." (RCAHMS, 4)

One of its first initiatives was a user-centered photo sharing initiative in which it began accepting user-contributed content. RCAHMS began to allow direct public contributions to its MyCanmore online image collections database via the application programming interface (API) of the social media service Flickr. Within six months, more than 2000 images and 350 text contributions were added by users.

In a project funded by the Royal Society of Edinburgh, RCAHMS partnered with the University of Edinburgh, National Museums Scotland and the National Galleries of Scotland to hold a social media training series for the Scottish cultural heritage sector titled “Digital futures of cultural heritage education.” The collaborators worked to establish a research agenda for museum and gallery education for the digital age with the further goal to inform and align policy and practice in the use of social media. RCAHMS also sponsors the research program “Beyond Text” at the University of Edinburgh to explore the role of users in contributing to the public online presence of cultural institutions, the ways in which users might contribute to the ‘making’ and ‘unmaking’ of public archives, and the ways in which a global public learns and constructs meaning from institutions’ digital collections. Among the program’s current research projects is a study of how new online media environments are changing the way users engage with, and learn from, the collections of cultural institutions.

By articulating an audience-based vision at the outset of its digital and social media planning, RCAHMS established an internal mindset of open engagement, which attracted influential partnerships and led to internal technological evolution.

Chemical Heritage Foundation (CHF)

The Chemical Heritage Foundation is unique among heritage organizations in the diversity of its heritage preservation and outreach programs. It crafted its emerging media plan to help it re-imagine itself as a platform for telling the story of chemistry using its extraordinarily broad collection of heritage content (i.e. art and object collections, oral histories, archives, rare books) that span the entire historical narrative it supports. These assets provide rich material for digital storytelling. The challenge the organization has begun to address in the past year is to find ways to make its high-quality event programming and collections data more accessible to online audiences.

CHF’s strategic planning approach advocates a high level of collaboration that is focused on “the organization” telling stories, rather than individual programs. It focuses on the creation of digital assets that meet measurable, audience-based needs in the near term; retain ongoing relevance through vigilant curation in the longer term; and provide it in consistently updated formats that will allow the next storytellers of chemical heritage to

readily continue the narrative. To this end, CHF adopted the following seven goals for its digital media strategy in the summer of 2012:

1. CHF publishes its digital products in formats optimized for search (SEO), sharing and exploration.
2. CHF tells the story of chemistry in human context—stories by people, for people.
3. CHF provides timely, relevant engagement opportunities for its audiences.
4. CHF's content is available whenever and wherever our audiences need it.
5. Digital strategy is a core consideration in CHF's public-facing processes and initiatives.
6. CHF facilitates active and enlightening dialog with its audiences.
7. CHF's staff members are savvy, empowered digital advocates for chemical heritage.

These vision statements were each supported by approximately three objectives and an appropriate number of tactics. For example, under Goal 3, the following objectives and tactics were among those articulated:

Objective: Increase audiences for CHF events by 35% in FY 2013 through a program of interactive online livestreaming.

Tactics:

- TriCaster device for portable in-house production of livestreamed events.
- Social discovery with simulcast tie-in using Google Hangouts
- Create a Vimeo channel as platform for a high-quality online archive of event footage
- Measure views through YouTube Insights, Vimeo analytics and streaming logs

Objective: Establish mobile interactive tour in FY2013 to increase average visitor engagement in CHF's permanent collections space by 10 minutes.

Tactics:

- Toursphere Mobile Application Service for museums
- Virtual docent tour video for six cases
- iPad Checkout Station for Visitors with pre-loaded tour
- Museum promotional signage and postcards incorporating coded links/QR code
- Launched in phases of six cases per iteration.
- Testing by CHF staff members and random visitors.

- Measure with Toursphere analytics and built-in survey feature

By the end of the 2012 calendar year, CHF had achieved its objectives for livestreaming through the broadcast of four events. Online audiences for these events more than doubled total attendance with views from around the world. Content for CHF's mobile app was developed during the fall of 2012 and will launch by February of 2013. It has spurred a broader interpretive multimedia program that has enhanced its social media channels as well. Through these objectives, the organization has enhanced existing audience engagement experiences and opened them up to much a much wider array of audiences with relatively few additional resource requirements.

COMMONALITIES IN PLANNING APPROACH

Collectively, these organizations mentioned above represent a wide range of perspectives related to the preservation of heritage. Their digital strategies reflect that diversity, yet these also share common themes in approach. Here are similarities that can inform other digital planning processes related to the preservation of heritage.

Write an Honest Situation Analysis

Defining goals, objectives and tactics for digital strategy is a process that requires a realistic evaluation of organizational position and responsibilities, whether perceived or actual. This typically examines events and circumstances in the organization, professional fields or among affected publics (including internal ones) that can be leveraged for acting on these results. This should also include threats, including heritage resources the organization is currently charged to protect, or situations it commonly finds itself in when online engagement could make a difference. It should also include a frank look the organization's existing technology in comparison to emerging platforms.

Root Digital Planning in Existing Organizational Priorities

The critical leap to success depends on tactics being rooted in a larger strategic vision for the organization. In many cases, this has been articulated to some degree with a mission statement and a five-year outlook. While having these directives makes the social media strategic planning process much easier, many heritage organizations either don't have such a document, or it's severely out of date, or more likely lacks measurable specificity. Additionally, pre-existing commitments, politics, and infrastructure may not allow a direct route to an articulated plan based purely in mission. In these cases, a

strategic plan for digital media can spur a grass-roots recognition of the value of defining audiences and measurable expectations of work.

Thoroughly Define and Prioritize Audiences

The principles of social media in particular will often engage naturally when you are using the social tools while intentionally remembering who your audience is and what drives them. The “World” is not an audience. Neither is “The Public.” This will make participation from the staff and publics much easier as well. Measurable success in digital strategy depends on articulating every potential audience for the organization, and prioritizing those by importance. This will help focus appropriate digital platforms as well.

Monitoring and Management

There must be someone responsible for social media execution, and they must be supported by an interdepartmental team. They must also have appropriate tools to accomplish this job. Milestone check-ins are critical to the success of each project. Commit wholeheartedly and integrate these functions into job descriptions of a full-time individual, but be realistic about what they can accomplish in a given period of time. Google Analytics is used by virtually every organization evaluation. The free service provides a deep level of data on how visitors access and interact with websites. Google has recently begun to focus on increasing its capabilities for measuring social media’s impact on website traffic. For social media monitoring and posting, Hootsuite is also widely used by each organization that engages on multiple platforms. Hootsuite allows subscribers to collaboratively schedule posts, monitor social engagement and respond to audiences through one web-based interface. Once an account is setup, Facebook, Twitter, Google Plus and LinkedIn streams can be organized into tabs. Information from those tabs can be further organized into columns, providing a comprehensive social media dashboard.

Costs and Content Development

Costs for digital media initiatives vary as widely as the content standards of the organization, and the greater the time put into crafting this plan, the more efficient it will be in the long-term. Online audiences value consistent, authentic connection with individuals at an organization over higher production values with a corporate voice. Agreed-upon posting schedules and suggested best practices for documenting field work will keep the short-term costs for the public engagement side of digital strategy low. Based on outcomes of the situation analysis, investment will go toward adopting or sustaining storage systems for heritage data that can interface with web-based platforms.

Heritage organizations routinely partner to protect the resources they care about. That spirit of partnership is effective online as well. NCPTT collaborated with the local university journalism program, other National Parks and National Heritage Areas to accomplish some of the tasks in the development of its plan. It also shared its expertise in helping partner organizations like the Association for Preservation Technology launch their digital initiatives.

Be Your Own Platform

Digital media services and platforms will come and go. They are all ultimately tools. It is critical that heritage organizations own their data and take responsibility for continually growing its accessibility. While this is especially important for metadata related to memory collections, it also applies to the organization's collective voice, a critical part of which should be its blog. Unlike social platforms whose fates are controlled by their parent companies, most blogging platforms allow back up and migration of data through open formats. With their multimedia capabilities, blogs are the most effective means for dynamic digital storytelling. As was demonstrated with SHA's response to the "Diggers" television shows, it can also be a place to centralize thought leadership and mobilize audiences. Additionally, its built-in syndication capabilities make automating direct feeds to social media and mobile applications possible.

Internal Participation

Seek organizational buy-in the long-term, but start initial planning with an interdepartmental group of influencers that are most enthusiastic about heritage outreach. Identify the digital interests of staff members, and then encourage that through training by people with those areas of expertise. Provide the opportunity to apply those skills with internal engagement opportunities that are internal or to a limited audience. For written posting procedures, one page is ideal for a social media policy. Legalistic guidelines discourage internal participation and lessen the effectiveness of online conversation.

While day-to-day engagement is a critical component in gaining trust, a much more effective strategy is to use time-limited digital outreach campaigns. Use the organization's long-term activity calendar to align planned projects with potential campaigns, involving as much of the organization as possible over the course of each year. A project lead and team are assigned to keep these time-limited campaigns on track. But other willing staff must be empowered with awareness and proper equipment so they know how to look at a situation and capture engaging content as it presents itself.

Conclusion

Defining goals, objectives and tactics digital planning facilitates a proactive approach for organizations. It ensures that strategic directives can be sustainably accomplished in a world that demands digital accessibility. This goes beyond the traditional archival responsibilities of such organizations to address the current expectation among audiences for ever-present engagement. For any historical narrative, people are both the catalyst and the audience. Much like the digital landscape, these audiences are also diverse and complex. The strategic planning process simplifies focus for both these areas so that professionals in fields such as archaeology, archives, preservation, conservation, landscapes and oral history can be more effective in advocating for heritage resources.

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