Gulf Coast Heritage Association, Inc.

**Technology Improvements for Visitor Services and Staff Productivity at
Historic Spanish Point**

1. Statement of Need

Gulf Coast Heritage Association (GCHA) is committed to connecting people of today with the rich and fascinating history of southwest coastal Florida. Those people are comprised of both local residents and tourists who are connected to our area's history primarily through their museum experiences at Historic Spanish Point. Open to the public since 1982, this accredited institution features environmental resources (Florida native gardens and nature trails), archaeological exhibits (the museum's *A Window to the Past* exhibition is the only place in the country where visitors go *inside* a prehistoric shell midden), Florida pioneer era structures (house, chapel, and citrus packing house), and formal gardens from the winter estate of Mrs. Potter Palmer. Please see the Historic Spanish Point site brochure attached to this application (Supporting document #1).

Every visitor enters the 30-acre museum through the Historic Spanish Point Visitors Center housed in the 1927 Osprey School that was renovated in 1996 for this purpose. It features introductory exhibits and orientation video, meeting and program space, and the museum shop. This *Building Institutional Capacity* project is designed to serve every visitor so that their interactions with museum staff and volunteers are efficient, informative, secure, and pleasant.

Three goals from the 2005-2010 strategic plan are the nucleus of this *Museums for America* grant request: 1) Insure that the administration and delivery of programs are professionally carried out by an adequate number of qualified staff members who are compensated appropriately; 2) Establish financial stability and insure high levels of accountability; and 3) Maintain and/or upgrade equipment to insure staff productivity and efficiencies in museum operations including administrative, curatorial, fundraising, site maintenance, and visitor services.

The first goal has been addressed in that the GCHA board continually strives to maintain staff compensation at competitive levels. It is well known, however, that professionals in all walks of life need more than just a paycheck to be fulfilled in their work. It is also essential that they have up-to-date tools and equipment so that they can accomplish their work efficiently and in line with modern expectations. At a staff workshop to discuss possible projects that might merit an IMLS *Museums for America* grant, it was unanimously decided to request funding for *Technology Improvements for Visitor Services and Staff Productivity at Historic Spanish Point.*

The second goal focuses on financial stability and accountability. Trained volunteers supervised by the Visitors Services Coordinator handle admissions, membership sales, and museum shop purchases. Cash registers are used to ring up admissions and sales, however, the current equipment does not produce reports or manage inventory. Volunteers must invite guests to sign a guest book in order to collect data on where people are from, and fill out sales reports in the shop at the end of each shift to document sales. Cash drawers are balanced by the bookkeeper at the end of each day, and data is then entered manually into the museum's QuickBooks accounting software. These processes are time consuming and subject to human error. Plus, the current system does not capture critical data such as whether a visitor is local or a tourist, or how many times a year a particular member may visit Historic Spanish Point. The proposed new "Point of Sale" system described in this proposal will efficiently manage admissions, membership

purchases, museum shop sales, and program registrations, plus produce essential reports for all of these functions.

Other visitor services improvements are designed to greatly enhance our first communications with visitors. Currently, the front desk volunteers, along with small posted signs, are responsible for informing visitors about tour times, special programming, membership benefits, and even current site conditions, such as a slippery boardwalk after a rain or the chapel closing early because of an evening wedding. The redesigned Visitors Center will feature two large LCD monitors where the museum will display information on rates, tour times, on-going exhibits, educational programs, and important safety tips for the outdoor site. This easy communication of basic information will free up our front desk volunteers to streamline the admissions process. Visitors waiting in line will have information delivered in an easy to follow format while also learning about the museum from the moment they step into the Visitors Center. Staff can easily program the engaging signage with software and equipment specifically designed for education facilities, libraries, and museums.

The final component of this *MFA Building Institutional Capacity* project addresses the third strategic plan goal to maintain and/or upgrade equipment to insure staff productivity and efficiencies in museum operations. Historic Spanish Point administrative staff would see higher efficiency of file sharing, data transfer, and communication by the installation of a network for Internet and internal connectivity. Improving the speed, and in some cases accuracy, in which museum staff function on a daily basis would benefit visitors in terms of better application of programs, membership information storage and retrieval, bookkeeping and calendar sharing, management of the museum store inventory, and collection of admissions totals and visitor demographical data.

The three goals addressed by this project are from the Historic Spanish Point Strategic Plan, 2005-2010. Its development was directed by a team of professional non-profit consultants with the process funded by a grant from a local foundation that was matched by private contributions. The three month long process included interviews with key stakeholders, focus groups, and two full day Board workshops. The GCHA Board approved the plan in February 2005 and, through annual Board workshops, evaluates progress and makes adjustments to strategies.

The proposed project components will collectively provide a significant improvement to museum operations, directly benefiting staff and volunteers and, through the efficiencies achieved, museum visitors. Historic Spanish Point is located in Sarasota County on the southwest coast of Florida. The area's population is nearly 400,000 people, of which 31% are over the age of 65 (compared to 17.6% statewide) and only 16% under 18. A large majority of residents are white (89.8%), with 4.2% Black, 4.3% Hispanic, and less than 1% Asian. The area is fairly affluent, with the 2000 Census documenting a median income of nearly $42,000 (compared to $38,819 statewide).

These demographics support research done for GCHA by Museum Assessment Program (MAP) reviewers, who stated that the vast majority of people in this community are "well-educated, familiar with museums, and eager learners." In addition, the Sarasota County Convention and Visitors Bureau actively markets the area as "Florida's Cultural Coast" and reports that four million tourists visit each year. The community supports a first rate symphony, opera company, ballet, several professional theaters, and many art galleries. Sarasota County is also home to four

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accredited museums: the John and Mable Ringling Museum of Art (Florida's state art museum), Marie Selby Botanical Gardens, Mote Marine Aquarium, and Historic Spanish Point. The professionals from these museums and other museums throughout Florida work together through local and state museum associations. Recommendations from several of these institutions helped Historic Spanish Point staff research the best vendors for this project.

GCHA proactively evaluates and measures progress on all Strategic Plan goals. It also is committed to understanding the museum's current and potential audiences and their needs. For example, in 2007-2008, the museum participated in the Performance Management Program offered by the American Association for State and Local History and the Center for Nonprofit Management. Over 300 visitors completed detailed surveys with the data compiled, analyzed, charted, and compared to other museums and historic sites. The resulting report outlined five key factors of the museum experience that were the most significant to the vast majority of visitors: Overall Impact, Better than Expected, Feeling Welcomed, Interesting Presentation, and Quality Exhibits. The "feeling welcomed" attribute, along with high rankings from visitors that Historic Spanish Point staff and volunteers are helpful, friendly, and knowledgeable, underscores the importance of this project. Efficient systems will allow visitor services staff to fully focus on people instead of paperwork concerns.

2. Project Design
The GCHA strategic plan identified three institutional goals, described above, that would be served by this *Technology Improvements for Visitor Services and Staff Productivity* project. With significant input from the visitor services volunteer staff – those who work at the Admissions Desk and Museum Store – the project team has outlined specific activities, outputs, and outcomes for this project.

Activity #1: Upgrade and interface point of sale software and equipment into one system that will handle all visitor and member related financial transactions so that visitors and members are promptly and professionally served. The Microsoft Dynamics Retail Management System (RMS) will feature three workstations, each with a monitor, receipt printer, bar code scanner, credit card reader, and cash drawer. The software will provide real-time tracking of member and visitor demographics, manage store inventory data, and produce daily reports on sales, attendance, visitor demographics and program registrations.

Fairway Marketing Group, the expected vendor for this activity, will provide expert support and training so that the new system will be tailored to the specific retail and visitor data required at Historic Spanish Point. RMS will network with GCHA's finance office so that the bookkeeper can easily input data into the museum's general financial reports.

With a five-year contract for system support, Fairway Marketing Group will be available to insure accurate use of the new system and to help implement changes that project evaluations may recommend. This activity will be managed by the Visitors Services Coordinator and Bookkeeper.

Activity #2: Install two 46" LCD monitors in the Visitors Center, one in the introductory exhibits area and one in the Museum Shop, that will provide general museum information with colorful photographs and text so that every visitor may easily learn what is going on at Historic Spanish

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Point that day and in the future. These will be operated by two AIS digital signage players that can be programmed daily by museum staff.

Evaluation of the usefulness of the monitors will be conducted through visitor surveys and front desk volunteers so that appropriate or needed programming changes can be made. This activity will be managed by the Deputy Director and Marketing Coordinator.

Activity #3: Purchase professional staff computers and implement a network that will connect ten work stations in the administrative and program offices of Historic Spanish Point. The new system will include the addition of four personal computers with minimum 160gb storage and 2gb RAM with Windows XP Professional operating system and full internet and file sharing capabilities, four 19"-23" flat panel monitors to coordinate with the new PCs, and ten surge protectors with battery backups to prevent loss of data through power loss or fluctuations. Networking will require one 10-port Ethernet network internet switch with minimum 1gb transfer speed, four 4-port Ethernet network internet switches or routers with minimum 1gb transfer speed, and new Ethernet cables. All ten computer workstations will be downloaded with Microsoft Office Professional 2007 software and Adobe Acrobat Pro software. In addition, GCHA will purchase ten portable USB drives of minimum 8gb with 16gb preferred to be used for data transfers, storage and security in the event of disaster plan activation. These devices will be used to back up important files on a weekly or monthly basis as well as used for temporary storage and transfers to allow for more secure file sharing. With technical support assistance from Computer Advocates, the Marketing Coordinator will manage this activity.

3. Project Resources: Time

In preparation for this grant proposal, GCHA staff and visitor services volunteers created a master list of information that most museum visitors want when they first arrive at Historic Spanish Point. The list was built on visitor responses to surveys, frequently asked questions (from visitors in person as well as phone inquiries), and program activities. In addition, GCHA has redesigned traffic flow in the Visitors Center to maximize the efficiencies of the new equipment, information monitors, and staffing. Please see the attachment showing current and proposed floor plans associated with this project (Supporting document #2).

In September, 2010, traffic flow renovations to the Visitors Center will be completed, work that is funded outside the scope of this grant request but essential to successfully upgrading visitor services and meeting the project's goals. At the same time, the project team will contact qualified vendors and equipment retailers to get information and prices for the most current equipment available within the project budget.

In October the new point of sale system will be ordered. Installation and system programming, plus staff training will take place in October and November. The Visitor Services Coordinator will be responsible for continual training of volunteers who work in visitor services at Historic Spanish Point. With the assistance of the vendor, the project team will conduct quarterly assessments to evaluate the system and provide enhanced training for the system users.

In November the Marketing Coordinator will purchase the large screen information monitors for installation and programming by mid-November, 2010. The project schedule has been designed so that both the point of sale system and the information monitors are operational no later than

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early December so that we are ready to serve museum visitors during the busy Florida tourist season of December through April.

In January, 2011, GCHA staff will purchase four new computers, then install a new network system that will connect ten work stations of the administrative and educational programming staff of Historic Spanish Point. Computer Advocates will train the museum staff in effectively using the network capabilities so that the museum will operate more efficiently and accurately. The museum's IT manager is the Marketing Coordinator who also will conduct periodic assessments.

The time schedule is designed for all technology upgrades to be completed by February 2011. During the following three months, these improvements will be monitored and evaluated by staff and volunteers with necessary improvements made as required. Visitors will be surveyed to discover if their front desk experiences were stress free and enjoyable. The final project report will be produced by the Project Team in June 2011.

3. Project Resources: Personnel
The project team is comprised of Linda Mansperger, GCHA Executive Director, Mike Sprout, Deputy Director, Tess Herschman, Visitor Services Coordinator, Laura Dean, Marketing Coordinator, who is the museum's IT manager and webmaster, and Marilyn LaBallister, Bookkeeper. Collectively, these professionals have over 60 years of museum and teaching experience, which are described in detail in the attached resumes.

Ms. Mansperger will serve as project director and will be responsible for coordinating all activities, managing the time schedule and budget, and producing the final report. Responsible for all museum programming, Mr. Sprout will provide content for the information screens and manage visitor surveys. As Visitor Services Coordinator, Ms. Herschman trains and schedules the volunteers who work in admissions and museum shop. She is also the museum store manager responsible for retail purchasing and inventory control. Ms. Herschman will be the staff liaison with the Fairway Marketing Team. Another essential project team member is Laura Dean, Marketing Coordinator, who also serves as the museum's webmaster and IT manager. She will work with Computer Advocates on the new staff computers and networking, plus produce the programs for the LCD monitors for visitors. Ms. LaBallister, the museum's Bookkeeper, is the final member of the project team and is responsible for accounting for admissions, memberships, and shop sales. The project will improve her ability to provide accurate reports to the staff and GCHA Board on all museum finances.

Working with the project team are Fairway Marketing Team, the expected provider of the RMS admissions and store equipment and software, and Computer Advocates, a museum partner for all computer management activities. Located in Tampa, Fairway Marketing Team works with Florida retail stores, museums and gift shops, including the Morse Museum of American Art in Winter Park, the gift shop at the St. Joseph Children's Hospital in St. Petersburg, and the for-profit store The Hay Exchange in Plant City. (Please see supporting document #3) Computer Advocates is located in Sarasota, Florida and has worked on Historic Spanish Point computer needs for many years. The company also works with area churches, medical offices, and other small businesses.

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3. Project Resources: Budget
The total budget for this project is $86,443 and will include the purchase and installation of point of sales, visitor information, and staff computer equipment and software that will collectively improve each visitor's interaction with the museum and professional staff productivity. With this project based on GCHA strategic plan goals and considered a priority by professional staff, GCHA is committed to matching MFA grant funds through operating funds and staff time, additional grants and donated services.

GCHA is an accredited museum in operation since 1982. It receives a "clean" audit annually, owns its facilities, has no long-term debt, and operates each year under a realistic budget with staff and board oversight. GCHA has successfully managed previous MFA grants as well as funding from the state of Florida, Sarasota County, and numerous private foundations. The project will be managed by the executive director, a seasoned professional with over 30 years of experience.

4. Impact
The three major elements of this MFA *Building Institutional Capacity* project – point of sale system, visitor information monitors, and computer upgrades and networking – are designed to serve every visitor, member, volunteer, and professional staff member at Historic Spanish Point. Visitors will find that their interactions with museum staff and volunteers are informative and pleasant, and that their financial transactions handled professionally, securely, and efficiently. Volunteers will find it easier to meet visitor needs. Staff will achieve greater productivity, GCHA will operate more professionally, and the GCHA Board will benefit from greatly enhanced reporting capabilities that will result in a better understanding of visitor demographics, information that will be used to improve marketing and program outreach.

The proposed point-of-sale system will generate specific written and accounting reports, including daily, weekly, monthly and annual attendance reports, credit card usage, and inventory. These reports will help direct volunteer scheduling and merchandise ordering. Visitor demographics through zip code entries will be collected, supporting future marketing plans designed to attract both local residents and tourists. The new system will also track how often and when each member visits the museum, information beneficial to the program staff for planning future programming and to the GCHA Board for cultivating renewals, upgrades, and long-term contributions to special projects and the museum's endowment.

The installation of two 46" LCD monitors in the Visitors Center, one in the introductory exhibits area and one in the Museum Shop, will provide general museum information with colorful photographs and text so that every visitor may easily learn what is going on at Historic Spanish Point that day and in the future. The Marketing Coordinator and Deputy Director will develop and implement content to insure that the monitors are providing current information and answering the questions most often posed by visitors.

Specific outcomes will be developed and measured through the use of visitor surveys conducted on a quarterly basis and feedback from the Visitor Services volunteers. For example, previous evaluations documented that 93% of visitors feel welcomed and find staff and volunteers to be very helpful and knowledgeable. The target goal for this new information center is to increase that percentage to 97%.

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The third activity of new computers and networking administrative and program staff work stations will greatly build capacity for Historic Spanish Point, improving staff efficiency and boosting morale as the museum's professional staff have improved tools to successfully complete their duties. Formal evaluation will be done periodically at staff meetings.

As noted earlier, the administrative and program staff enthusiastically support all aspects of this project. Along with the GCHA Board, they have identified it as essential to achieving greater efficiency of file sharing, data transfer, and communication. Improving the speed, and in some cases accuracy, in which museum staff function on a daily basis also will benefit visitors in terms of better application of programs, membership information storage and retrieval, bookkeeping and calendar sharing, management of the museum store inventory, and collection of admissions totals and visitor demographical data.

The mission of GCHA is to connect people of today with 5,000 years of human history in southwest coastal Florida. That connection frequently begins when the visitor enters the Historic Spanish Point Visitors Center. With funding from the Institute of Museum and Libraries Museums for America grant program, GCHA will successfully achieve strategic plan goals and better serve our audiences.

BUDGET FORM: Section B, Summary Budget

	$ IMLS	$ Cost Share	$ TOTAL COSTS
1. Salaries and Wages	$0.00	$23,600.00	$23,600.00
2. Fringe Benefits	$0.00	$5,192.00	$5,192.00
3. Consultant Fees	$0.00	$0.00	$0.00
4. Travel	$0.00	$0.00	$0.00
5. Supplies and Materials	$37,783.00	$0.00	$37,783.00
6. Services	$5,437.00	$9,363.00	$14,800.00
7. Student Support	$0.00	$0.00	$0.00
8. Other Costs	$0.00	$0.00	$0.00
TOTAL DIRECT COSTS (1-8)	$43,220.00	$38,155.00	$81,375.00
9. Indirect Costs	$0.00	$5,068.00	$5,068.00
TOTAL COSTS (Direct and Indirect)	$43,220.00	$43,223.00	$86,443.00

Project Funding for the Entire Grant Period

1. Grant Funds Requested from IMLS	**$43,220.00**
2. Cost Sharing:	
a. Applicant's Contribution	**$43,223.00**
b. Kind Contribution	**$0.00**
c. Other Federal Agencies*	**$0.00**
d. TOTAL COST SHARING	
3. TOTAL PROJECT FUNDING (1+2d)	$86,443.00
Percentage of total project costs requested from IMLS	**49.9 %**

*If funding has been requested from another federal agency, indicate the agency's name:

Schedule of Completion - Gulf Coast Heritage Association

Project Activity	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
Complete reception/shop renovations**	XX									
Validate project components & budget	XXXX									
Activity #1										
Purchase Point of Sale equipment		XXX								
Installation of Point of Sale equipment			XXX							
Staff and Volunteer Training			XXX							
Measure and evaluate				XX			XX			X
Activity #2										
Purchase Information Monitors			XX							
Program monitors			XX							
Measure and evaluate				X	X	X	X	X	X	X
Activity #3										
Purchase computer equipment & software					XXX					
Installation of network system					XXXX					
Staff training						XXX				
Measure and evaluate								X		X
Produce final project report										XX

**Renovations are separate but complementary to this MFA project.