

## Managing Through Hard Times

By Thomas M. Costello and Patricia E. Williams

**D**irectors of museums and historical organizations across the country continue to face some of the most difficult decisions in their careers, and in the history of their institutions, with even budget-savvy professionals experiencing situations completely out of their control. It will be a watershed for many institutions.

A recent article in *The Chronicle of Philanthropy*, “Fewer Nonprofit Groups Expect Job Cuts in 2010,” suggests in an online survey of 1,000 nonprofits that only nine percent expect to be cutting more positions. Yet, the number of institutions making staffing adjustments and other program reductions this year continues to grow. Some city and county governments and other educational and cultural organizations are not projecting a return to past peak revenue levels before 2013. State governments are wondering where additional general funding will come from once the Recovery Act funding is spent. Governors have made all the easy adjustments, and they will now have to cut agencies to the bone. Local organizations whose budgets include significant public funds will be especially hard hit. In addition, private support is slow to rebound, and endowments remain substantially lower in value and unable to fill the gap.<sup>1</sup>

**D**irectors and senior staff, along with their boards, must take action now to rethink their organization and operations creatively yet with discipline. There is no one simple formula to be followed. Each museum or historical organization is unique, with circumstances special to it. Questions must be addressed and answered that will affect the institution to its core.

This technical leaflet offers strategies and tools that have worked successfully restructuring museums in downturns. Museums are used to thoughtful planning, taking sometimes a year or two, but this crisis comes without the advantage of time. Some institutions may have to make and implement those decisions in a matter of weeks or days. This requires a focus on leadership (staff and board), decision-making, effective communication internally and to external audiences and constituencies, and determined implementation of a set of actions affecting the institution from top to bottom, and straight to its heart.

The goals of this leaflet are to:

1. Establish a framework for crisis decision-making in history organizations, what steps to take.
2. Outline the potential levels for change in adverse circumstances, don't think of cutting back, cut through your institution to the future.
3. Balance mission with extreme stresses on budget and audiences, engaging boards as well as visitors and other community segments on the way to the future.
4. Implement change and prepare for additional change, make sure your action plan addresses personnel, programming, marketing, fundraising, facilities, and finance.
5. Provide directions for marketing and public relations in turbulent times, get the word out, and educating everyone who will listen.

The recommended actions are based on the experience of the authors. Also, polls taken from program sessions at the 2009 AASLH Annual Meeting provide insight as to how the field was coping as of last August.

## It Begins

You receive a call from your program officer at the state arts and humanities council with some really bad news. "We thought we had made it through the state budget crunch with a fifteen percent reduction last year. We just got word from our department that we have to cut our program grants by eighty percent for the coming year. Sorry to tell you this with only a few months to go before the start of your fiscal year, but we are lucky that we can provide funding even at this low level, and not lose the grant program completely."

Calls like this are coming to museums and cultural organizations of every size and scope, in every cor-

ner of the United States, from local governments, county commissions, and other state agencies as well as from individual donors and corporate and foundation supporters. These calls may well reflect a second cycle of public funding reductions coming on the heels of last year's challenging reductions when endowment or other investment income dropped, and many companies simply have stopped making contributions. Individuals have also seen their discretionary income decrease. Perhaps members or annual donors find themselves out of a job for the first time in their careers. People may have been forced to reduce their visits to museums, further impacting budgeted revenues.

What is a museum to do when it is being hammered from nearly every direction?

## Responding to the Crisis

First step back, maybe walk around the block. Then, you move forward without hesitation.

The first calls you, the director, make are to your board chair and to your principal staff person. In the series of meetings organized from the calls, your first order of business is to summarize the likely budget impact in financial terms, and at several levels of operation. It is not unreasonable to consider budgets at twenty, forty, or even sixty percent below your current budget level. You should be cautious in making statements about program impact at each level because you will only know the magnitude of the impact following greater analysis.

In your first meeting, determine a framework for crisis decision-making, involving principal staff and selected board members, based on discussion with the assembled board and staff members. This group should probably not exceed six people, half from the board and two to three staff. In a small museum with not more than two or three staff, call the next most responsible staff person to you. In a large organization, the principal business manager or head of finance would participate, plus the assistant or associate director. Beyond this working group, there may be a few others internally to keep informed and possibly help in their areas. Externally, these may include the mayor, county executive, governor's representative, and one or two major donors/stakeholders.

Recommend taking the following or similar actions, presenting them over a series of meetings, possibly two per week, with a target date for presentation and board approval:

1. Determine a range of budget scenarios, in the form of revenue reductions from current budget, stating your assumptions, but also clearly outlining your worst-case scenario in terms of funding and three to four levels in between the worst case and current budget.
2. Analyze the impact of varying budget levels on

programs and services, facilities, collection—again focusing on the numbers at this stage.

3. Develop a short narrative, maybe a paragraph, describing what the museum’s programs would look like at each level of operation in terms of hours open, services provided, exhibitions, and programs, size of staff, etc.
4. Rank your programs, services, operations, and collections in terms of your mission.

The first big challenge is that these steps, and others that follow, may be required to be completed in days or weeks. You are faced with some of the most critical decisions you may have to make and you have no time to mull them over.

### Cutting Through, Not Cutting Back

We assume that the challenge you face involves decisions about staff, the continuation of some programs and services, even the viability of your institution going forward as a completely independent organization, or even if your institution can continue. Wherever your institution falls on this continuum, the process remains the same—you must make decisions that cut through your organization to shape a future vision for it in the coming decades. Trimming budgets here and there is not an option. As you work through this process following this mantra of “Cutting through, not cutting back,” taking programs that are strong, and setting aside pieces that aren’t, a picture will start to emerge of something new that is your institution going forward. Only those leaders who take advantage of the current situation to ask hard and perhaps long-overdue questions about what their museum is doing, and why, will establish a strong strategic roadmap for success.

### Identifying Expense Reductions

There will be several iterations of the next steps, because you will likely discover that you won’t balance the budget on the first attempt. You have to make further reductions, often suspending or eliminating specific programs and services. You must look past the pain to the future, developing strategies for moving forward, and thinking in terms of a three- to five-year plan beginning with 2010. Strategies are

defined as a specific set of actions selected to achieve a clearly defined and measurable institutional goal that will build and/or strengthen your organization. These strategic goals are externally oriented. Measurement of success is based on the renewal and growth of one or more external audiences, the sustaining and improvement of your collections and/or facilities to improve audience access to collections, programs and services, and/or the improvement of the public perception of the institution.

Create a table like the listing below (adjusting column width to allow for information entry) to complete your evaluation. Include every program, service collection, and core activity of the organization in the summary. Depending on if you have a long-range or strategic plan and how you have organized that plan, you may have much of this completed already. It is important, however, to go through this process now from the program or activity back up to the mission, rather than the reverse. Also, it is essential to identify your audiences in specific terms (no general audiences anyplace in this analysis). Calculate your net cost/revenue from the program/service, and include that in your summary. Do not distribute overhead, only include direct costs. Finally, offer your own assessment of the value of the program or activity or function within the museum—impact on and importance to external audiences, serving a core mission role, age and flexibility of the activity, etc. Be tough. Be very realistic in your performance expectations. Recognize the dead wood. No sacred cows allowed!

It is best to do this step with your ad-hoc crisis committee. Members of the committee can help in presenting the plan to the board, or help in your presentation of the proposed overall program. In larger organizations, department heads should be involved as the activity relates to their area. Involvement is important, but when dealing with human resources, you must embrace confidentiality and sensitivity. You will be making difficult and probably not crowd-pleasing decisions concerning some part of your staff, board, or community. Nevertheless, you will need to keep your several audiences or stakeholder groups informed as to the general process and time frame you are working within, via email or other broadly

INSTITUTIONAL EVALUATION											
Program, service, core activity, and/or collection	Staffing		Other resources required		Direct Revenues	Net \$\$	Special donor/sponsor/board interest	Audiences		Activity cycle (ongoing, annual, quarterly, seasonal, one-time, part of a series)	Relation to Mission
	#s	\$\$ incl fringe benefits	Describe (matls., space, collections, tech, etc.)	\$\$				Type (members, recurring or one-time, diversity, age, etc.)	#s		

distributed memo. You do need to share with your ad-hoc crisis committee your progress on this and every task. Your meetings should not be so frequent that you have to constantly report on what you have gathered until you have something from which you can draw conclusions and your committee can see the proposed results of your work. The committee should run interference for you with board members who may like to get too involved in the details. You need to have time to get this analysis done.

## QUESTIONS TO ASK WHEN REVIEWING THE ORGANIZATION'S PROGRAMS

**How can you extend your program/service schedule?** Stretch out your plans so that you do fewer things each year, making a three-year plan into a four- or five-year plan. This has particular relevance for the collections area. Are there projects that would be good to do, but really can be deferred for a year or two? Is it a priority for funders or for direct audience involvement in comparison with other programs/services/activities?

**How can you adjust your open hours in ways that will save both personnel and utilities expense?** Some organizations find real utilities and security savings require being closed a greater number of days due to the time it takes to adjust temperatures.

**What are the programs or services that can be completely set aside?** Perhaps a program or service is marginally productive. Don't simply amputate, eliminate. If it is worthwhile, it can be picked up again.

**How can you reassign staff to handle additional responsibilities?** This will require eliminating programs/services or reducing their volume to allow for consolidation.

**Are there functions that, realistically, can be handled by volunteers?** Remember, it is not what volunteers think they can do, it's what you feel volunteers can do in the near term.

**Are there important functions that have been overlooked, and is now the time to address them, as you are making other adjustments?** It may seem odd, but this can be the perfect situation to introduce a new position, such as human resources, to improve management.

**Are there specific functions that you can consolidate with other organizations in the community?** This can save each organization money, but the delineation of time spent on each organization must be explicit. See Next Steps on page seven.

**Can some staff be outsourced to other organizations for a fee?** Accounting, IT, custodial services, even curatorial staff can be shared.

## POLL RESULTS

Attendees at the *Managing in Hard Times* session at the 2009 AASLH conference in Indianapolis indicated that they had done the following within their organizations:

Reduced number of exhibitions	1
Kept exhibitions up longer	5
Cut programs	5
Increased admission	4
Reduced hours	2
Closed portions of the museum or site	0
Used more volunteers	7
Restructured/consolidated administration	3
Restructured/consolidated program departments	3
Restructured/consolidated operations	1

How do your decisions compare? Remember, not all organizations are the same.

## Reducing Personnel Expense: The Most Important and Challenging Step

With few exceptions, personnel costs are the largest component of the budget. In the median history-related museum budget (including historic houses and sites, historical museums and societies) personnel costs (salaries, benefits and payroll taxes) account for fifty-one to fifty-six percent of the budget. The median personnel costs for public (i.e., government-owned) museums is sixty-three percent (in some museums, the personnel costs are as high as seventy percent of the total budget). In severe financial conditions, avoiding reductions in staff is virtually impossible.<sup>2</sup>

Temporary layoffs lasting a couple of months only make sense if there is a certain renewal of funding, but they can be cruel if they are made with wishful thinking of a return of funding. Furloughs keep all staff together, but the financial sacrifice in furloughs for the director and senior management is much less than for lower level personnel. Introducing a salary freeze is a normal response to a tight financial situation. At least it keeps the status quo, but it encourages the best talent to consider making a change to an organization that can reward their capabilities. A salary reduction is essentially the same as a furlough but distributed throughout the year, and the burden also falls on lower paid personnel. Most compensation in the museum and historical organization field is low, so salary cuts are especially harsh. Also, once a

salary level is cut, the return to previous levels takes much longer.

The best approach to adjustments in personnel costs is to make clear decisions about what programs and services are to continue, and to lay off those individuals whose position is eliminated by the suspension or closing of a particular program. It seems harsh, but psychologically it is the best approach for all personnel. The volume of layoffs can be cushioned in several ways including:

1. Holding positions vacant when there is a departure, then going through reorganization (the weakness in this approach is that vacancies are random, creating some holes that must be filled but for which you have no one internally with the functional skills to fill the position).
2. Offering a retirement incentive for the employees with the longest tenure, who could be in a position to take early retirement.
3. Providing counseling and assistance in preparing resumes, letters, and making contacts for those laid off. Among the session attendees at the 2009 AASLH conference, four made permanent layoffs, nine furloughed staff, and four introduced salary reductions. None of the other options were used.<sup>3</sup>

No human resource decisions can be personal, targeting a specific individual or group for any reason other than that the adjustments are based on program decisions. Age, gender, race, personality, or other defining individual characteristics cannot come into the choices for what positions to eliminate. Even job performance should not be used as a reason for choosing a position, unless there is ample written basis for such an action that has been exchanged with the incumbent months or years prior to any personnel actions due to economics. If decisions made show a hint of being directed at a person rather than at structure and program, the door is opened for discrimination and other claims that can consume you and the organization.

Another potential personnel savings is in benefits. There can be a reduction in benefits, which means either or both health insurance and pension contributions. Some museums have found ways of achieving very creative cost savings in health insurance by looking at the individual needs among the employees who have similar characteristics and/or needs, then

using a combination of insurance tailored to those needs, plus payments to a health savings account, plus personal payments to the employees, which can save thousands of dollars. Larger organizations probably benefit more from savings in this area, but it is an area worth exploring.

### Building Revenue

It is always desirable to increase revenues instead of making cuts in expenses. The present challenge is that the current economic conditions impact every area of revenues. Revenues can be increased in the following ways:

► **Changing the formula for payout of endowment and investment funds.** It is possible through thoughtful adjustments that the level of reduction in endowment income can be cushioned in this manner. Eventually, however, the new formula has to bottom out, given the steep reduction in the value of investments in 2008-09. The climb back to pre-recession income levels will take several years.

► **Establishing or increasing the organization's line of credit.** This source of funding is by its nature short-term. Eventually it will have to be paid back, with interest. At a minimum, an improved line of credit can provide cash flow to counter the timing of poor payment of commitments from government or some private sources, but it remains a loan.

► **Borrowing from unrestricted endowment or investment funds.** This approach, like use of the line of credit, carries an internal cost in two forms. One is that there is interest lost that would have been paid to the institution. The second is that there really should be interest paid on the use of these funds since it is—or should be—considered a loan. The use of cash reserves is the one type of financial asset that would not be considered a loan.

► **Sale of assets.** Some organizations may have buildings, land, or other real assets that can be sold for cash. In most instances, these assets will be sold below the previous high value, perhaps making their sale less desirable. It is, however, a near-term source of cash.

► **Deaccessioning and sale of collections or of selected collections items.** While a source of cash, this also goes against the standards of the field.

Even with the exceptions, e.g., when an institution

PERSONNEL COST ADJUSTMENTS IMPACT		
TYPES	PROS	CONS
Temporary layoffs	Good if short-term	Too much false hope for staff
Permanent layoffs	Allows long-term adjustments	Loss of institutional memory
Furloughs	Keeps all staff temporarily	Tough on staff w/low salaries
Salary freeze	Keeps status quo	Talent may leave
Salary reduction	Keeps all staff temporarily	Tough on staff w/low salaries



has after much deliberation decided that it will no longer hold certain types of collections or objects, there is the expectation that the proceeds from the sale of these items will be reinvested in the collections. Again, sales of any assets at this time will be in a market well below previous high points. There is also the very real, extremely negative and long-lasting impact on the image, character, and trustworthiness of the institution.<sup>4</sup>

► **Increased fundraising:** Even this logical option for increased revenues has been hard hit by the recession. Corporate giving has dried up. Foundation support may in some instances, for some institutions, still be available. At this writing, perhaps the only area with possible increased funds availability is with family foundations and trusts, which require a specified payout as a percentage of its value. With the increase in the stock market, some of these family foundations may find they actually have to make more contributions.

For any institution thinking that its solution is increasing fundraising, ask yourself, why would a prospect want to make new or increased contributions to your institution now, and not two years ago? The answer suggests the donors you *might* be able to solicit for increased support now, like *current donors*, with an established relationship and interest in the organization. Another group might be prospects who may have been cultivated prior to the crash of the market and who are close friends of board members. In this climate, it is most important that fundraising *focus on renewal of support* by the greatest number of past donors, to stabilize the donor/funding base, and position the institution for future growth.

The key to an institution's success from this point forward is that it has a well-thought-out and articulated strategic plan of action for the future, based on successful adjustments of the institution's budget to bring its revenues and expenses into line (if not completely balanced), and is positioned for future success in clearly defined areas. Success rests on strategic direction, not on past glories or current needs. Strategic direction means that audiences are identified to be engaged, and that these audiences hold potential for future involvement and support of the institution. The biggest donors are giving for the organization's future, not simply to fill a financial hole.

## Implementation and Management

The review, evaluation, analyses, and choices made above bring you to a point where a (hopefully strategically) selected mix of programs and services is presented and approved by the organization's board in a balanced budget. Now comes implementation.

Keep the following points in mind when you implement your new program plan:

► **Move ahead quickly.** You must organize an action

## SOURCES OF INCREASED FUNDING

Of the AASLH session attendees, the following were cited as sources of increased funding:

Cash reserve	6
Setting up or increasing line of credit	3
Borrowing	1
Changing endowment payout formula	5
Deaccessioning objects in the collections	1
Consolidating some operations with other organizations	2
Outsourcing your staff to other organizations for a fee	2
Increasing fundraising	14
Other	2

Again, these options are not mutually exclusive. A lot of hope is pinned on fundraising.

plan to quickly implement the changes. A lethargic, hesitant implementation is not sensitive to staff or institutional needs at this point, but drags out the pain and can increase inertia against change.

► **Move ahead positively.** Equally important is that you move ahead with assurance and confidence. Remember that most directors have never had to make these kinds of adjustments, so we can take heart that we are not alone. Your demeanor must be strong, outgoing, and positive. Now is not the time for "Woe is us," but instead to say that this is the right course for the institution at this time, and say it with confidence. You are the leader, even if you have long practiced a team approach. Even teams need leaders. For personnel changes, the most humane action is to tell the person that their position is being eliminated and that they are being let go. Escort them from the building. They return at an arranged time in the next two days to collect their personal items/materials from their work space, and possibly receive career counseling. An alternative approach, giving notice and having affected staff remain on the job for a time, has a much more negative effect on the institution. The choice is yours, but experience is speaking here.

Changes in operations take more management time. While you must implement your plans with speed, realize that changes take time to work, and that there are many details of the changes that will require full team involvement. The director must manage the team to sustain its adaptation to new ways. Depending on the size of your organization, it could take up to a year for all of the changes to settle into new routines. You need to plan to spend a lot more

time in meetings than you probably have in the past, working through details, then personally checking on people and progress, monitoring how things are going, and keeping in touch with your staff and board so that you can quickly learn of any issues that are developing that could affect the changes.

► **Increase marketing and public relations into the community.** Simultaneous with the announcement of your actions internally, communications must go out to the organization's several stakeholders including board members, visitors/clients/customers, donors, government agencies and/or representatives, vendors, as well as public users who comprise the organization's community and who will be important in shaping the broader public opinion about the organization. This is marketing, but it is in the form of good public relations.

The communication you send to your stakeholders should be in the form of a letter signed by the executive director and the board chair to signal that this is not simply a management action but has the endorsement and weight of the board. This correspondence is likely the first of several giving people updates on progress and anecdotal successes with changes.

For the most important stakeholders, the major public and private donors, set up personal meetings with them so that greater detail can be shared as it relates to their particular interests. The more public the support, the more that the government agency or elected officials should be represented at board meetings prior to and following the changes, and be kept informed through the process of change. Meet with local media print and broadcast editors. Secure interviews in each medium to get the word out, and so the community can see you as the human leader making the adjustments necessary to preserve and strengthen an important community resource with the increased involvement and support of the community. If you have several staff members, you will want to encourage them to be engaging with individuals and groups they closely associate with, so that the organization has an increased and unified public presence.

If your organization has an active website, use interactive Internet tools such as emails, blogs, tweets, bulletin boards, etc., to help get the word out. If your organization hasn't been using the Web, this would be the ideal time to begin, for much of its use is free, and perhaps you can engage young(er) people in your organization online via this most contemporary of media. If you have glossy publications, it may be time to consider a more modest format, demonstrating prudence and economy.

► **Fundraising:** The first letter described above should not involve fundraising. The next piece should be a fundraising letter. As discussed above, the letter needs to emphasize the future, where the organization is going, not the hole it is in presently—

your recent set of decisions should have taken care of that hole for this year—but where you see the institution going, your strategic goals. Describe how the involvement of individual users, members, and donors will make the critical difference in achieving these goals, sustaining and strengthening the institution and its programs. Their involvement financially as well as in terms of continued use of the institution is essential, as is their role as voices for the institution among their friends, colleagues, and contacts. Now is the time for their increased or at least renewed support. You would be pleased to speak with them if they have questions. Any major donors, i.e., \$1,000 and above, and possibly lower (depending on your donor base), should receive a personal contact from you and/or a board member, and a visit, based on their importance as a current or prospective donor. Depending on the size of your donor base, a personal call from you, a board member, or a volunteer to every donor is good public relations and builds a powerful connection.

### Next Steps: And Then What Are You Prepared to Do?

You have made it this far, but you are not at the end, only the beginning, of your journey. You need now to consider the following:

► **Changes in your board.** You have now seen how your board works under stress. Hopefully you have a strong and supportive board chair with whom you have only strengthened your relationship. How did other board members respond? Are they stepping up to the plate with financial gifts? Are they opening doors for you in the community? Now is an excellent moment to discuss bringing new blood on your board, emphasizing financial capability and connections, fresh thinking, and talents. Is it also time to set up one or more advisory committees, or strengthen your board committees, including new faces who can help extend the organization's reach into the community, and perhaps become board members in the future? Take advantage of this moment while everything is in a state of fluidity to address these concerns, but only if you have support from key board members.

► **Build relationships with sister institutions in the community.** After taking action to meet your own organization's needs, discuss (again, with approval of at least some board members and your chair) creating new relationships within your community, including:

- **Cooperative agreements** on services, programs, exhibitions, operations—anything that could offer mutual savings and benefits to the organization and greater visibility in the community. Lending expertise or trading services is one possibility.
- **Consolidating operations** that may have been hard to think about in a short period of time, but

following the initial round of changes, the organization can plan ahead for economies of scale in joint operations with other organizations.

- ***Is a merger possible with another organization?***

Would it be a good thing for your organization? Which organization is the lead, and which is merged into it? There is never a merger of equals, but some mergers can be good for the community. They are, however, neither easy nor fast.

► **Build new constituencies.** You will have seen where your stakeholders are strong and weak in the process you have just gone through. Are there new community segments you see as good to have on your organization's side in the future? Why? Because you have to...

► **Be prepared for the next round of adjustments.** Hopefully, you will not have to go through this process again, but odds are that you will have to make at least two or three more adjustments. Each of the next step actions above helps to get you there. Also, make sure you take a good vacation: it is essential for yourself. You deserve it. Good luck!

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## Resources

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## Endnotes

<sup>1</sup> Heather Joslyn and Chris Thompson, "Fewer Nonprofit Groups Expect Job Cuts in 2010," *The Chronicle of Philanthropy*, XXII: 2, 10.

<sup>2</sup> 2009 Museum Financial Information, American Association of Museums, passim.

<sup>3</sup> A single institution could have used all three forms of personnel expense reductions.

<sup>4</sup> Visit the AASLH website, [www.aaslh.org/ethics.htm](http://www.aaslh.org/ethics.htm), for more information on ethics and the selling of collections.