
SHARING RESOURCES: Expertise To Go

3. PEER ADVISOR NETWORK

Fairfield Museum & History Center

Wed. March 16, 2016

MEETING NOTES

Introduction & Overview

John Cusano, CT Office of the Arts' *Community Development Coordinator*, who runs PAN in CT, spoke of how he was one of the first 14 peer advisors trained by the state, before he was hired to *run* the network in CT. He praised the quality of the advisors, all of whom are fully committed to working their best for \$300/day (of which the client pays \$100/day). The value, he said, was often in getting outside expert opinion and advice in an area where you are not so confident. Today there



are some 30 arts and heritage advisors, all eager to share their experience and expertise. Cusano said PAN advising can help set a new course for an organization. The 2 days maximum engagement can stretch out for many months, as the advisors consult with board members and stakeholders. He pointed out the 145 bullet-pointed areas of expertise they can help with (see last page of online brochure [here](#)). Each advisor self-assesses their skill levels after training and these abilities are entered onto a master-grid.

Cusano assured his audience that the application was simple, and advised focusing the request with a small group of staff, board and other stakeholders. Applications are reviewed quickly and are very rarely turned down. Once the application has been approved, staff at the local and Hartford offices consult the master grid of advisors, call the top choices and, when they agree, advisor and organization are put together and, if they agree on a scope of work, they complete a **Memo of Understanding**, which serves as the contract for the engagement. From then on, the engagement is between organization and advisor. Cusano said “almost

every contract (of the 200+ he has seen in the last 4-5 yrs) has been a home run.” He said the final reports are simple to do - and often, especially when a peer advisor has helped set a new direction for an organization, the organization will go back to continue that forward motion.

Stamford Museum and Betsy Fox

Following John Cusano’s introduction, we heard from two sets of engagements. The first was between the Stamford Museum and Nature Center (Kirsten Brophy, curator) and peer advisor



Elizabeth Pratt Fox, museum and historic site consultant, to create a searchable database and archive of Gutzon Borglum’s papers. Kirsten praised the ease and simplicity of the application process: “within two days we were matched with the ideal advisor... and we got exactly what we needed.” The assessment form on the application helped her, a fairly recent employee, get a good understanding of how her museum operated. Her challenge was that, although the

museum is one of the largest repositories of the works of Gutzon Borglum, there was no archival organization to help sort the papers and respond to requests. With an intern at her side, who was about to go to graduate school as an archivist, she had an idea that she needed a retrievable archive with a database. When she saw the PAN brochure she jumped at the opportunity, and within 2 days was talking to Betsy, who did a wonderful job asking questions, developing a system and recommending other tie-in archival best practices. Now, when the requests come in, instead of rifling through bankers boxes, Kirsten has a simple system enabling her to easily retrieve the documents she needs. For her part, Betsy praised Kirsten for doing excellent preparation - gathering together all the relevant material that would be needed for such an archive. She spoke to how often projects change, and at Stamford, when she realized there were other collections, she also gave advice on the archives as a whole, talked about preservation, having important papers registered online with the National Archives and the Archives of American Art, and about cataloging systems. She concluded saying all the PAN engagements have been great learning experiences for her too.

Norwalk Symphony and Richard Scaldini

The second case study was with the Norwalk Symphony Orchestra working with nonprofit organization consultant, Richard Scaldini, on board re-organization and strategic plan development. Louis Pietig, was the executive director hired at the end of the process. On the overall Peer Advisor Network, Scaldini attested to the enormous care taken to find the exactly right peer advisor for a project. He



found the NSO an exemplary project: an organization “with new blood, its feet in cement, but

with a new determination to move forward.” The projects he works on typically fall under board governance or strategic planning. Overall, he's found it important to focus on **process** and to nudge people to follow the process. It's important to define your desired outcome, the goals you can live with for 3-5 years, and to translate that into a **work plan** (boards need to have work plans, with metrics and clear responsibilities, as well as staff). Louis attested to how easy his job was after Richard's work. He had had some engagement with the old board and saw how it had been transformed since Richard's engagement. Previously, although there was a strategic plan, there was resistance to change and little interest in implementing the plan. With a new board chair and half the board leaving, the situation was improved. He discussed the value of using a board self-assessment questionnaire to help the board see for itself where the gaps were. In conclusion, Louis commented that the 16 hours of the PAN engagement was “the least expensive thing the board has ever done, with the greatest benefit.”

Questions

To the question of how much could be done with an 8-hour engagement, Betsy Fox responded that there's often a lot of prep beforehand that's not included in the 8 hours - so often the consultant will put in more than the time they are being paid for. John added that he thought 90% were for 16 hours and that that could be repeated one more time during the fiscal year. He also commented that the relationship built during a consultancy will sometimes lead to an organization hiring the advisor as a consultant.

David Green is happy to take calls about the Peer Advisor Network. The brochure, guidelines application and other PAN forms are available at the Cultural Alliance website at: <http://culturalalliancefc.org/pages/panforms.html>