National Portrait Gallery

Inspiring People

Connecting People

Digital Strategy

Public Digest – November 2016

Oliver Vicars-Harris
Connecting Culture
w w w . o - v - h . n e t

Contents

1   Introduction

What does it mean to be a public facing organisation in the digital age, or should we now be thinking 'post-digital'? How are audience expectations continuing to change? How can we respond in a way that meets the challenges of the evolving landscape and exploits the opportunities presented by digital to deliver our mission?

As part of its *Inspiring People* project, the National Portrait Gallery (NPG) is confronting these questions in its first formal Digital Strategy.

1.1   Background

The National Portrait Gallery is about to embark on significant future planning, mapping out its approach for the next ten years and needs a sound digital strategy to underpin this.

The ambition is to open up access to its remarkable collection of portraits and transform its appeal to the widest possible audience. It will take a creative and inclusive approach to sharing its collection and expertise as widely as possible through digital content and publications as well as national and international collaborations.

Through all of this, and with people at its heart, the Gallery will have a new reach and relevance and be fit to reflect Britain on a world stage.

1.2   Objectives

The Digital Strategy provides a strategic framework for digital development between now and 2020, although it is not anticipated that all of the ambitions set out will have been achieved by then. It offers a set of directions rather than a detailed roadmap to development over the next five years. Any such map could only be misleading, since success depends on being able to respond to the fast-changing digital and cultural landscape.

The emphasis is on how the Gallery communicates and delivers services to its audience, rather than how it uses digital to support its back of house operations. The focus is on digital development principles, rather than the information systems and technology that underpin delivery. This Strategy needs to be aligned with an IT strategy alongside others around Content, Digitisation, Interpretation and Audience Engagement. It is designed to inform not replace the need for deeper digital thinking as part of the strategies drawn up by individual departments, for example around online trading or online learning.

Given the opportunities for digital learning and the significant proposed investment in a new Learning Centre, it is recommended that the separate Digital Learning Strategy be developed. This would enable an in-depth review and plan for the future use of digital tools for learning and participation at the Gallery. It would sit within the overall principles of this Strategy and provide an outline of the principles and proposed content for a new digital learning offer for specific audiences.

Perhaps most importantly, the principles of the Digital Strategy need to form part of the overall Organisational Strategy and one of the objectives for 2020 is that the two should be woven together.

1.3 Approach

The Strategy sets out how the Gallery's physical and digital vision should be intertwined and how this feeds into the digital brand proposition. It takes a horizon scan of the digital and cultural landscape and the opportunities this presents. It assesses the current position in terms of the Gallery's digital offer, together with benchmarking the Gallery alongside its peers. Very importantly, it looks at the culture change needed to deliver on the Strategy.

Following on from this, the Strategy sets out some key Aims and Principles around digital content and product development. It looks at the needs of the different audiences, investigating appropriate platforms for delivery. It then identifies some potential projects, placing emphasis on finding a balance between quick wins and major developments, and sets out a methodology for prioritising investment. It presents some guidelines for effective implementation, together with the infrastructure required to support this.

Lastly, it tackles the critical issue of sustainability by examining potential models for supporting necessary investment in the Strategy, and looks at business intelligence in terms of essential processes for measuring and learning from digital development.

This Public Digest version of the Digital Strategy has been shortened for publication but contains the central sections as well as all the key recommendations.

RECOMMENDATION

The Gallery should align this Strategy with those in other areas and aim to ensure that the Digital Strategy becomes an integral part of the overall Organisational Strategy.

2 Executive Summary

This Strategy represents the National Portrait Gallery's commitment to developing its digital offer as a key component of its overall ambitions moving forward. In the future it is expected that 'digital' will become an intrinsic part of what the Gallery does and that this thinking will be interwoven into the overall strategy for the organisation.

Digital has matured to the extent that it is 'everywhere' and a fundamental conduit to connect with audiences. The Gallery's digital vision flows from its overall vision and directly supports its strategic objectives. Its online presence offers an important opportunity to flex the brand in an open and playful way to emphasise the focus on 'people'.

Although the Gallery has achieved a lot with a little to date, the pace of change around digital means that it urgently needs to invest in order to keep in step with its peers and satisfy audience expectations. It also needs to make firm decisions on some existing digital products and services in which to cease investment.

One of the biggest challenges in achieving the necessary 'digital transformation' is that of culture change within the organisation. There are a number of sticking points which need to be resolved in areas such as relaxing control over publishing information, taking a more open approach to content sharing and offering multiple voices. Digital also needs to be better positioned with stronger advocacy in terms of ambition and attitude to risk.

This Strategy sets out some clear digital aims in line with the Inspiring People aims of transforming Access, Understanding and Sustainability and some robust principles for digital content and products. These need to be closely adhered to in order to take a more strategic approach to development on appropriate delivery platforms, informed by organisational rather than individual interest and ambition.

Along with serving the traditional Gallery audience, digital presents a unique opportunity to reach the much larger proportion of public who may never visit. There is currently a significant gap in intelligence about the non-visiting audience appetite for digital cultural content and a need to experiment with new ways of connecting people to it.

The Gallery has a multitude of ambitions in terms of projects but needs to develop these into a strategic portfolio spanning its aims and including a mixture of quick wins alongside more major developments. Some 'big ideas' resonating with the overall vision will help to inform project emphasis and investment needs to be prioritised through a clear balance of effort to reward in relation to aims, audience and income.

More professional and flexible processes for project planning and management need to be put in place with a more robust infrastructure to underpin them. Alongside user-centred design, a rigorous culture of analysis is essential to inform a continuous development practice based on genuine digital product and audience insight.

Sound technical choices need to be made along with building effective supplier relationships. Strong leadership is required as are more appropriate skilled resources in terms of staffing. The Gallery needs to build digital capacity within the central team alongside competency across the wider workforce.

The Gallery currently has no annual budget for digital development and this clearly needs to change if it is to deliver on its digital ambitions. As well as making provision for ongoing revenue funding around digital, the Gallery needs to be entrepreneurial in its approach to raising capital funding. Very importantly, it needs to think laterally in terms of developing the right partnerships to attract future investment, both within and beyond the sector.

This is a summary of the individual recommendations set out **in bold** throughout the full Strategy

Introduction

1. *The Gallery should align this Strategy with those in other areas and aim to ensure that the Digital Strategy becomes an integral part of the overall Organisational Strategy.*

Vision

2. *The Gallery should review its Digital Vision regularly in line with its overall Vision and measure progress in relation its Digital Strategic Objectives.*

3. *It should see digital as an opportunity to extend and flex its brand to emphasise the focus on 'people' as the point of connection between its portraits and its audience.*

Horizon scan

4. *The Gallery needs to continue to scan the digital and museological horizon and capitalise on current opportunities and emerging ones moving forward.*

Current Position

5. *The Gallery should commission an independent external audit of its digital products and services every 4-5 years to assess whether they remain fit for purpose.*

6. *It should continue to invest in the digital products and services that are 'working well', stop investing in those identified as 'cease investment' and prioritise instead those that 'need development'.*

Organisational Culture

7. *The Gallery needs to implement a culture change in terms of how digital is perceived and where responsibility for digital content development sits within the organisation.*

8. *It needs to devolve responsibility for creating digital content across the organisation, while putting a range of clear Digital Content Guidelines in place.*

9. *It should maintain an open approach to promoting use of its content in other contexts beyond its own websites, consider publishing higher resolution images online and keep its Creative Commons license under review.*

10. *It should adopt a 'shared authority' approach to presenting multiple perspectives around its collections, including those of the audience.*

11. *It needs to be bold and entrepreneurial in its digital ambitions in order to present an attractive proposition for funding and partnerships.*

12. It needs to seize on digital as an opportunity to experiment by encouraging projects designed to test new ideas and be adapted in response to audience reaction.

Digital Aims

13. The Gallery should review its Digital Aims around Access, Understanding and Sustainability on an annual basis and reference them as key criteria for investment.

Digital Principles

14. The Gallery needs to ensure that its Digital Content and Product Principles are referred to and adhered to for all future digital developments.

Audience

15. The Gallery needs to develop greater understanding of the needs of its different audiences and set some clear priorities in terms of digital audience development.

16. It should consider placing particular emphasis on using its digital presence to connect with new and more diverse audiences, less well served by the physical gallery.

Delivery Platforms

17. The Gallery should make more use of passive digital displays to provide information in the building, together with interactive kiosks to provide in-gallery interpretation.

18. It should repurpose the Portrait Explorer in the longer term and replace it with onsite access to the Online Collections area of the redesigned website.

19. It should consider issuing VSAs with tablet devices to provide a bridge to in-gallery interpretation.

20. It should look for opportunities to develop its Audio-visual Guide into a more sophisticated multi-platform solution.

21. It should continue to trial solutions for in-gallery digital content delivered through people's own devices.

22. It should prioritise investment in redesign of its main website and aim to make this the core delivery system for all online content.

23. It should cease investment in microsites to deliver programme content unless they have a specific short-term strategic partnership objective or audience focus.

24. It should actively seek to deliver its content through a range of other third party online channels and platforms.

25. It should develop its social media strategy, responding to this fast-changing array of channels for reaching audiences while continually assessing their effectiveness.

26. It should make better use of social media embedded into the main website and use it to give the site more currency.

27. It should be wary of investing in the development of commercial mobile apps, unless as part of a content licensing partnership.

28. It should continue to look for low cost ways of repurposing its content into free apps to add value around the gallery visit.

29. It should consider carefully which platforms are most fit for purpose in terms of digital service delivery.

30. It should carry out further periodic online surveys to gauge evolving audience appetite in relation to digital service development across the range of platforms.

Projects

31. The Gallery should establish an ongoing development programme of digital projects, ensuring a good mix between quick wins and more major developments.

32. These projects should sit beneath a 'big idea' in relation to each of the Aims of Access, Understanding and Sustainability.

33. The Gallery should use the 'project investment balance' as first stage filter for determining the effort to reward ratio for digital development.

34. All new projects should be submitted through a formal Project Proposal process and assessed by the Digital Strategy Group.

Implementation

35. The Gallery should ensure digital projects are planned properly and that a Project Initiation Document is signed off by the Digital Strategy Group.

36. All projects should have a responsible Project Manager and Steering Group (for more complex ones) with the Head of Digital Programmes overseeing the roster.

37. The appropriate project management methodology should be used in relation to the nature of the project in development.

Infrastructure

38. The Gallery should position digital leadership as a critical and more visible component of the directorate and consider introducing a new Director of Digital role.

39. It needs to put more adequate digital staffing provision in place and take steps to rationalise the focus of the Digital Programmes Team.

40. It needs to make a clear distinction between revenue funded 'digital programme' staffing and capital funded 'digital project' staffing.

41. It should develop technical capacity within the Digital Programmes Team and digital competency across the gallery workforce.

42. it must ensure robust technical choices underpin this Strategy through an IT Strategy with attention to sound principles for an open approach to delivering content.

43. It should pay particular attention to systems integration to enable effective Customer Relationship Management.

44. It should balance the necessity of cultivating sustained core system supplier relationships with the need to bring fresh inspiration through new partnerships.

Insight

45. The Gallery should take clear steps to gather the necessary ongoing intelligence around breadth and depth of engagement with its digital offer.

46. It should put a 'digital dashboard' in place for ongoing monitoring together with producing an annual report on 'digital performance'.

47. It should continue to benchmark itself against other organisations and develop its audience segmentation and research.

48. It should develop a set of Digital Key Performance Indicators reviewed on an annual basis by the Digital Strategy Group.

49. It should ensure that the intelligence gathered is used to inform ongoing digital development as well as continuous development practice for the organisation overall.

Investment

50. The Gallery needs to ring-fence an annual revenue budget for digital alongside a 'Digital Challenge Fund' to enable it to take advantage of new opportunities.

51. The Gallery needs to be entrepreneurial in its approach to packaging projects to attract capital funding.

52. The Gallery needs to think laterally in developing the right partnerships to attract investment, both within and beyond the sector.

3   Horizon Scan

The National Portrait Gallery's Digital Strategy is set within the context of an evolving landscape, in terms of both the museum world and digital universe it now finds itself operating within. Ability to navigate this landscape is key to unlocking future opportunity.

This view of the landscape presents ten clear opportunities for the NPG:

1. The digital appetite for culture is growing rapidly and there is an opportunity to reach target audiences who may never come to the physical gallery.

2. Digital offers tools for engaging with the Gallery's audiences in ways that go far beyond what can be delivered through the physical programme.

3. Digital presents a genuine opportunity to involve the audience in questions they are passionate about and harness their input into extending knowledge and awareness.

4. The Gallery's works on display present an opportunity for becoming 'digital devices' in their own right which people can interact with both on and off site.

5. The in-gallery audience is becoming increasingly digitally adept and equipped with their own sophisticated devices for engaging, contributing and sharing content.

6. Complementary audience appetite for the digital and the physical means the two can be developed in tandem by the Gallery with a virtuous circle between the two offers.

7. As an owner of quality content the Gallery has increasing opportunities to raise revenue by repackaging its intellectual properly across a range of publishing and broadcast contexts.

8. Digital presents the Gallery with opportunities for developing a range of powerful new partnerships and sponsorships, both in terms of technology and content.

9. The data generated through digital interaction has potential to revolutionise the way in which the Gallery designs its services and promotes itself.

10. The move towards becoming a more digitally adept organisation has potential to enable a shake up of the status quo in the Gallery and develop new ways of working.

RECOMMENDATION

The Gallery needs to continue to scan the digital and museological horizon and capitalise on current opportunities and emerging ones moving forward.

4   Digital Aims

The National Portrait Gallery has three clear transformational aims in terms of its future strategy to be realised through the *Inspiring People* project and these translate directly into its digital aims:

- **Access** – to enable use of its collections and related content

- **Understanding** – to encourage participation and engagement

- **Sustainability** – to ensure revenue streams to support its activities

4.1   Access

Digital will support the Gallery in transforming access to its Collections as follows:

- Increasing the breadth and depth of the online **Collections catalogue**

- Improving the ability to **browse and search** the catalogue

- Improving the **discoverability** of the Collections through social media, SEO, etc.

- Extending the range and ways of viewing **digital images** of the Collections

- Promoting the ability to **cross-reference** works in the catalogue

- Presenting **multiple levels** of interpretation within the catalogue

- Presenting the outputs of ongoing **research projects**

- Promoting the Collections through **other portals**

- Promoting links to works in **other collections**

- Providing a **gateway to the physical** Collections in the gallery

- Promoting **national and international programmes** beyond the gallery

4.2   Understanding

Digital will support the Gallery in transforming engagement with its audiences as follows:

- Promoting the **gallery programme** in a clear and appealing way onsite and online

- Offering **gallery guides** onsite and online to inform the visitor experience

- Providing **in-gallery interactives** in relation to individual displays

- Developing **narrative-based** routes into the collections and portraiture

- Implementing and evaluating **trial interpretive initiatives** for the Collections

- Drawing on the collections to encourage contemplation around **individual identity**

- Offering a variety of **digital activities** for children and families

- Offering **digital engagement platforms** for young people

- Providing a range of **digital learning resources** for schools and colleges

- Providing a platform for distribution of **audio and video content**

- Providing **specially tailored content** designed to increase access to target audiences

- **Showcasing events** to promote and complement live activity in the gallery

- **Showcasing projects** to encourage and reflect participation

- Developing digital content to complement **national programme initiatives**

4.3 Sustainability

Digital will support the Gallery in transforming sustainability through helping to raise revenue as follows:

- Promoting the Gallery to **members** and followers

- Presenting an appealing **prospect for support** and involvement

- Encouraging general and specific **online donations**

- Providing simple registration/payment processes for public art **competitions**

- Providing effective booking and **ticketing** for exhibitions and events

- Promoting the onsite **catering offer** with ability to book online

- Promoting opportunities for **venue hire,** filming and loans

- Promoting the sale of a profitable range of merchandise through the **online shop**

- Offering simple **print-on-demand** services both onsite and online

- Providing an effective online mechanism for **image licensing**

- Exploiting opportunities to repurpose content through **digital publishing**

- Assessing appropriate opportunities for developing **digital products**

- **Cross-promoting** the various elements of the commercial offer online

- Building **customer intelligence** by gathering data across a range of systems

RECOMMENDATION

The Gallery should review its digital Aims around Access, Understanding and Sustainability on an annual basis and reference them as one of the key criteria for investment.

5   Digital Principles

The National Portrait Gallery has a clear set of content and product development principles[1].

5.1   Content development

The Gallery's digital content will be developed drawing on the following set of principles:

- **Audience-focussed**, rather than mirroring the organisation

- **Different routes in** appropriate to a range of audiences

- **Accessible** to its target audience

- **Personalised presentation** based on audience interest

- **Collection at the core** of the website experience

- **Accurate and authoritative** in terms of scholarly research

- **Playful and fun** in terms of modes of engagement

- **Presenting multiple perspectives**, including those of the audience

- **Involving the audience** through tools for creation and contribution

- **Multilingual** key priority content areas to reach international audiences

- **Interactive** rather than passive modes of engagement

- **Cross-promotion** of content across the website

- **Content distributed** across multiple platforms

- **Content redistribution** through partnerships

- **Open licensing** for non-commercial use by the public

---

[1] 'Product' in this context refers to a distinct digital development, rather than a commercial product.

5.2 Product development

The Gallery's digital products will be developed under the following set of principles:

- **User-centred** and insight-driven

- **Well designed** and architected

- **Iterative development** through prototyping and testing

- **Start simple and scale** progressively through continuous deployment

- **Accessible** conforming to standards of best practice

- **Responsive** or mobile-first by design

- **Platforms appropriate** to audience and objectives

- **Technically robust** in terms of underlying systems

- **Seamless user experience** across different systems

- **Well integrated** and database driven

- **Open and sharable** in terms of software and data standards

- **Sustainable and scalable** in terms of future development

RECOMMENDATION

The Gallery needs to ensure that its Digital Content and Product Principles are referred to and adhered to for all future digital developments.

6 Projects

The National Portrait Gallery has identified a number of potential projects set out in an appendix to the Strategy as examples of the kinds of initiatives needed to deliver on its three Aims: Access, Understanding, Sustainability.

These fall into two different development categories:

- **Major developments** – requiring large investment to deliver significant results
- **Quick wins** – which can be delivered for minimum effort to maximum effect

Each of the Aims is headlined by a '**Big idea**' in terms of what the Gallery's future digital offer sets out to achieve.

6.1 Access

BIG IDEA: *The Portrait Portal*

The Gallery will become the destination for British portraiture, revealing the inspiring people within and beyond its collections…

6.2 Understanding

BIG IDEA: *The People Portal*

The Gallery will become the go-to place for exploring personal identity, connecting people through links between the sitters in our Collections and our audience…

6.3 Sustainability

BIG IDEA: *The Customer Portal*

The Gallery will develop a deep connection with its supporters and customers, following their journey through multiple motivational and transactional touch points…

RECOMMENDATION

The Gallery should establish an ongoing development programme of digital projects, ensuring a good mix between quick wins and more major developments. These should sit beneath a 'big idea' in relation to each of the Aims: Access, Understanding, Sustainability.

Acknowledgments

Authorship

This Strategy has been put together by **Oliver Vicars-Harris**, an independent consultant specialising in helping cultural organisations connect with their audience. He has a background in digital, having championed many digitisation and online initiatives, and has played a key part in a number of major museum transformation projects. He has spent over 20 years working with a wide range of arts venues, often during periods of major change, and has a good understanding of the challenges facing the National Portrait Gallery.

Specialist input on the changing expectations of the Gallery's range of audiences has been provided by **Shaun Romain**, an independent consultant with over 20 years experience in the sector. He is an expert in measuring and understanding how culture is consumed, analysing the appeal of onsite and online products. He has a particular focus on cultural and creative business growth and sustainability.

Involvement

This Digital Strategy has been commissioned and led on behalf of the National Portrait Gallery by **Sarah Tinsley**, Director of Exhibitions and Collections. Essential background information and insight has been provided by **David Saywell**, Head of Digital Programmes, together with his team.

Invaluable external peer review has been provided by **John Stack**, Director of Digital for the Science Museum and former Head of Digital for Tate. Further external input has been received from **Matthew Cock**, Chief Executive of VocalEyes and former Head of Web for the British Museum.

Helpful comment has been received from a number of National Portrait Gallery Trustees, in particular: **Stephan Shakespeare** (CEO and Founder of YouGov), **Kim Evans OBE** (Cultural Strategist and Chair of Clean Break), **Augustus Casely-Hayford** (Joint CEO of Zamyn).

The Inspiring People Project Coordinator **Holly Reed** has provided ongoing support and a range of further internal and external Gallery contacts have also been essential in providing input (see over).