

Recruiting the World

Mobile Strategy **at the Smithsonian**

December 2011 edition

Changes in the December 2011 version:

There are no changes to the Smithsonian's vision or strategic goals for mobile as of December 2011, but the key tactics have been updated as a result of the previous year's developments. In particular, a seventh key tactic has been added to help scale up mobile initiatives at the Smithsonian by securing resources for an expanded SI Mobile central team and support services.

The achievements of Stage 1 (through FY 2011) have also been added to this document, along with an overview of the mobile governance plan and business model developed in July 2011. These are detailed in the appendices of the plan.

Finally, collaboration with the Institution's Assistant Secretary of Education and Access and her team on Stage 2's "mLearning" objectives, planned for FY2012, has begun, and yielded clarifications of the Mobile Strategy's goals that are reflected in this revised text.

Nancy Proctor, Head of Mobile Strategy and Initiatives

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I. Executive Summary: The Smithsonian's Mobile Strategy

Mobile offers the Smithsonian an unprecedented opportunity and critical tools for “recruiting the world” to help realize its potential as a leading Institution in the 21st century. Today there are more than 4 billion mobile phones in use around the world, and within the next three years, the majority of Internet use is expected to come from mobile devices rather than desktop computers.¹ This rapid increase in the power and adoption of mobile platforms leaves no doubt that mobile technologies are radically changing not just what the Web means to us, but also the way we work, play and learn in an increasingly connected world.

Mobile is also transforming what the Smithsonian is, and how it works. Hundreds of thousands of people already connect with the Smithsonian through their mobile devices: downloading our apps and digital content, surfing our websites and engaging with our social media platforms. With a mobile strategy firmly in place, the Institution is poised to direct and focus the impact of mobile, rather than simply react to the momentous cultural changes happening around us.

There are two main facets of SI's mobile strategy:

1. First, **integrate mobile technologies** into everything we do at the Smithsonian: linking platforms and initiatives, connecting communities and conversations, and crossing boundaries between disciplines to create a whole greater than the sum of its parts;
2. And as a result, **transform the Institution** into a ubiquitous network of people, conversations and communities that span disciplines, generations and geographies.

This strategy will enable the Smithsonian to achieve six key goals:

1. **Engage audiences where they are**, both on-site and beyond SI's walls.
2. **Open access to our data, content, collections and research** and support new uses of it through collaborative structures, platforms and initiatives.
3. **Create new opportunities for learning**, creativity and shared discovery within and beyond the museum and classroom.
4. **Equip SI staff with new tools** to work at the leading edge of their fields.
5. **Transcend disciplinary boundaries** by **connecting** communities, conversations and initiatives with both public and private partners.
6. **Update the Smithsonian experience**, its content and its brand as more relevant, accessible, and accountable to constituents.

¹ Gartner, “Gartner Highlights Key Predictions for IT Organizations and Users in 2010 and Beyond.” January 13, 2010 <http://www.gartner.com/it/page.jsp?id=1278413> Consulted January 27, 2011 and Sarah Kessler, IBM Infographic “Mobile by the Numbers” 23 March 2011 http://mashable.com/2011/03/23/mobile-by-the-numbers-infographic/?utm_source=feedburner&utm_medium=feed&utm_campaign=Feed:+Mashable+%28Mashable%29 Consulted 3 April 2011.

II. SI Mobile's Vision: **Recruit the world** to increase and diffuse knowledge



Founded on James Smithson's democratic ideals, the Smithsonian has been "crowdsourcing" since its first Secretary, Joseph Henry, recruited "citizen scientists" across North and South America to telegraph in daily weather reports, creating the first National weather map and service. Today the Institution has more volunteers than staff, and increases its reach and research exponentially by collaborating with individuals and communities globally after an example set by its second Secretary, Baird.²

Following in this time-honored tradition, the aim of SI's mobile strategy is to *recruit the world to further the increase and diffusion of knowledge*. The pursuit of this vision accelerates the Institution's transformation from a "Web 1.0" Institution that uni-directionally broadcasts knowledge to its audiences, into an interactive and distributed network of people, conversations and communities that extend and sustain the Smithsonian across disciplines, generations and geographies.

Mobile technologies have a multiplying effect on the capacity of the Smithsonian to make these connections and crowdsource in the 21st century. Mobile initiatives at the Smithsonian can create stakeholders in the Institution's success and future around the world by encouraging participation in the real and urgent work of the Institution. The objective of SI Mobile, therefore, is to put the Institution – its collections, research, programs and resources – not just literally onto people's handheld devices, but also metaphorically "in their hands." Those who build the Institution by doing its work also become stewards of the Smithsonian experience: the brand is in the hands of the people who produce it.

Although ambitious, this aim is also pragmatic. Like most cultural and educational organizations, the Institution will never have enough money, time and staff to do all that it could, should, and wants to accomplish. In this age of information on demand – a demand that is accelerating exponentially with the increasing penetration of Internet-enabled mobile devices – the Smithsonian can play a central role as a platform for the increase and diffusion of knowledge on the scale of Google, Wikipedia, Flickr, YouTube, Twitter and Facebook. But it cannot do this alone. Partnerships both large and small will be essential to the viability and success of the Institution in the 21st century, and mobile tools will be a primary means of both forging and fulfilling these alliances.

² Pamela M. Henson, "Spencer F. Baird's Vision for a National Museum," Smithsonian Institution Archives, <http://siarchives.si.edu/history/exhibits/baird/bairdc.htm>

III. What is mobile at the Smithsonian?

Today apps and smartphones probably come to mind first as the iconic representatives of “mobile,” but in fact mobile technologies have been part of the cultural landscape for over 60 years since the introduction of the first audio tours in museums. Since then, the number and kind of mobile devices used at the Smithsonian has proliferated. Nearly every museum at the Institution has at least one podcast series, and all provide other kinds of portable, downloadable content ranging from PDFs to eBooks and videos. Meanwhile, the majority of the Smithsonian’s actual and potential audiences still use phones that are limited to voice and text messaging. As we leverage all these mobile platforms to broaden access to the Institution as widely as possible, we need also to think about content in new ways, understanding that mobile is not just a consumer platform but also an interactive, geo-spatially-aware toolkit that supports dynamic research, communication and collaboration.

With today’s new networked devices – smartphones, tablet computers and wifi-enabled media players – multi-modal and asynchronous mobile communications are now easier and on the rise. Not just “narrowcast” audio tours but responsive mobile multimedia, including multi-player games, crowdsourcing activities, and social media, can be delivered via apps to participants’ own Internet-enabled phones and media players, instead of or to supplement devices provided on-site by the museum. The term “mobile” has come to encompass an ever-expanding field of platforms, players, and modes of audience engagement. Mobile today means both one-way broadcast delivery of media and interpretation, and two-way and networked conversations that take the Smithsonian from “we do the talking” to “we help our audiences do the talking” as Chris Anderson put it³ – whether or not Smithsonian staff are part of the conversation. In technologies and platforms, mobile at the Smithsonian comprises both:

- **Pocketable** (phones, personal media players, gaming devices) *and* **portable** devices (tablets and eReaders);
- **Smartphones** that run apps and access the Internet, *and* older “**feature phones**” that do little more than make voice calls and send text messages;
- **Podcasts** of audio and video content, *and* other **downloadable content**, including PDFs and eBooks;
- **Mobile websites**, optimized for the small screen and audiences on the go, *and* ‘**desktop**’ **websites**, designed for large, fixed screens but visited by a rapidly increasing number of mobile devices;
- **BYOD** (bring your own device) mobile experiences, designed for visitors’ personal devices, *and* traditional **on-site device distribution** for visitors who do not have or do not care to use their own phone or media player

³ Chris Anderson, “The Smithsonian’s Long Tail”, presentation at the Smithsonian 2.0 conference, 23 January 2009 http://smithsonian20.si.edu/schedule_webcast2.html Consulted 7 June 2011.

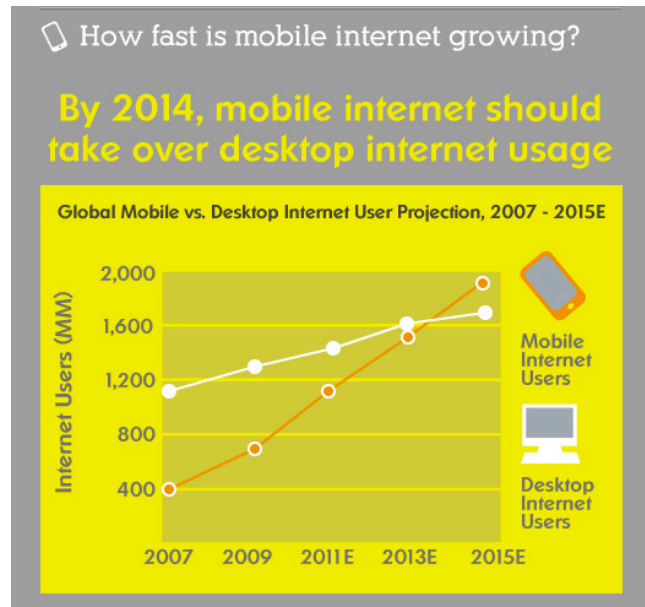
Although mobile is fast becoming the primary means of accessing the Internet, it is a profoundly different medium from the web as we have known it on desktop and laptop computers, with greatly divergent interfaces, content, interactivity, and contexts in which it is used. For many, mobile devices are now their main or only experience of web-based content and functionality. Mobile defines the nature of the web experience and web properties for these users, and will have an enormous strategic and practical impact on how the Smithsonian presents itself online. It is likely that within the next five years, web

redesigns at the Smithsonian will begin with the development of the mobile web site, which will then be expanded to create the larger-screen portal. We must prepare for what the dominance of the small, portable screen will mean for an Institution invested in online research and the presentation of large quantities of data and digital assets including high resolution images, video and immersive digital environments.

Mobile's disruptive potential also comes from its ability to combine intimate, immediate and ubiquitous access to the individual with an unprecedented power to connect people with communities and conversations globally: mobile is both private and public, both personal and political. Understanding that many of the mobile devices available today are handheld computers challenges us to think beyond the audio tour and use mobile programs to connect initiatives in both the digital and the analog worlds. It also inspires us to reinvent the Smithsonian's relationship with its publics by conceiving content and experiences that operate across devices and disciplines, both at the museum and beyond.

At the same time that the rise of mobile reshapes the Smithsonian's digital interfaces, it broadens access to the Institution exponentially. Not only are more people able to connect with the Institution's collections, research, communities and activities through their mobile devices, but they can also personalize their Smithsonian experience whenever and wherever they like, integrating collections, exhibitions and other offerings into a broader range of use-case scenarios than ever imagined. The Smithsonian can not only enter people's homes and classrooms, but also be part of their commutes, their travel, their work and leisure activities as never before. How will the Institution understand and cater to this huge range of contexts and demands for cultural content?

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Sarah Kessler, IBM Infographic "Mobile by the Numbers" 23 March 2011 <http://mashable.com>
See footnote 1 above.

IV. SI Mobile's Strategic Goals

Mobile is a key enabler of the strategic plan's priorities to support the Grand Challenges, broaden access, revitalize education, and forge collaborations across disciplines and other boundaries that both strengthen our collections and our organizational excellence. SI Mobile's strategic goals are formulated to support the Institution's strategic priorities as well as the development of the Smithsonian brand.

1. **Engage audiences where they are**, both on-site and beyond SI's walls.

Mobile will broaden access to the Institution by "meeting people where they are" in order to "take them some place new."⁴ This means developing mobile products and services that respond not just to people's geographic locations and expectations for information on demand, but also their attendant cultural and linguistic context, and needs in terms of sensory access and comprehension.

2. **Open access to our data, collections and research** and support new uses of it through collaborative structures, platforms and initiatives.

Enabling others to use Smithsonian data, content and digital collections will stimulate innovative new uses of our research both inside the Institution and beyond, strengthening our collections and their care through an extended network of contributors and collaborators.

3. **Create new opportunities for learning**, creativity and shared discovery within and beyond the museum and classroom.

Mobile will help revitalize education at the Smithsonian by connecting classrooms, educational providers and learners around the world. Mobile enables the coupling of on-demand information and knowledge with hands-on experiences to create unprecedented learning opportunities and collaborative potential in both formal and informal learning contexts.

4. **Equip SI staff with new tools** to work at the leading edge of their fields.

Mobile will enable organizational excellence through mobile learning tools that enhance staff's flexibility in response to new challenges, and demonstrate measurable outcomes from the Institution's use of technology to grow and share its knowledge and collections.

5. **Transcend disciplinary boundaries** by connecting communities, conversations and initiatives with both public and private partners.

⁴ Michael Edson, Director of Web and New Media Strategy at the Smithsonian Institution, quoting Kathy Halayko, a principal in the city of Falls Church, VA public school system on this instructional approach.

Mobile platforms will support the integration of the work of the Grand Challenges and other initiatives within the Smithsonian, and enable external connections with both individuals and organizations in new and perhaps unexpected ways, such as bringing together artists and scientists, educators and entrepreneurs, poets and politicians.

6. **Update the Smithsonian experience**, its content and its brand as more relevant, accessible, and accountable to constituents.

Mobile will help the Institution “think beyond museum”⁵ roles, opening up new ways to broaden its appeal, keep its content up-to-date and relevant, and attract new forms of funding, partnership and collaboration that create a positive impact on the world.

SI Mobile’s Metrics of Success

Mobile projects aligned with these strategic goals will literally put the Institution in the hands of our staff and constituents: volunteers, citizens, and collaborators of all skill levels and interests. The future of the Smithsonian brand in this mobile, networked world is dependent on our ability to project and live a truly open and interactive partnership with “the people formerly known as the audience.”⁶ The motivation here is to develop new and better ways of doing business, as articulated in the Institution’s core values. But engaging broad participation in the work of the Institution also increases the quality and relevance of the Institution’s collections, research and educational programs, and helps build a Smithsonian experience that is both accountable to and sustained by its constituents.

The metrics of success by which the Smithsonian’s mobile projects will be evaluated are quality, accessibility, relevance, sustainability, and accountability. When the work of the Smithsonian is **accessible** to our collaborators it also becomes more **relevant** as they engage directly in developing and executing initiatives. Our constituents are better able to champion the work of the Institution with their communities and leaders when they feel it is *their* work – when they have a personal investment and stake in the goals and outcomes of the Smithsonian. At the same time, creating a distributed network of contributors involved in the work of the Institution cultivates communities and conversations that **sustain** the Smithsonian and its discourses even when and where no Smithsonian staff can be directly involved. And as we have seen since the formation of the Institution’s early collections by citizen scientists, broader participation by a global public increases the size and **quality** of the Institution’s collections and expertise, as well as its visibility and **accountability** to its many publics.

⁵ Unpublished report of the Smithsonian brand experience workshop, Wolff Olins December 2010.

⁶ Jay Rosen, “The People Formerly Known as the Audience”, *Pressthink* 27 June 2006 http://archive.pressthink.org/2006/06/27/ppl_frmr.html Consulted 7 June 2011.

VI SI Mobile Key Tactics: *share, collaborate, standardize, enable*

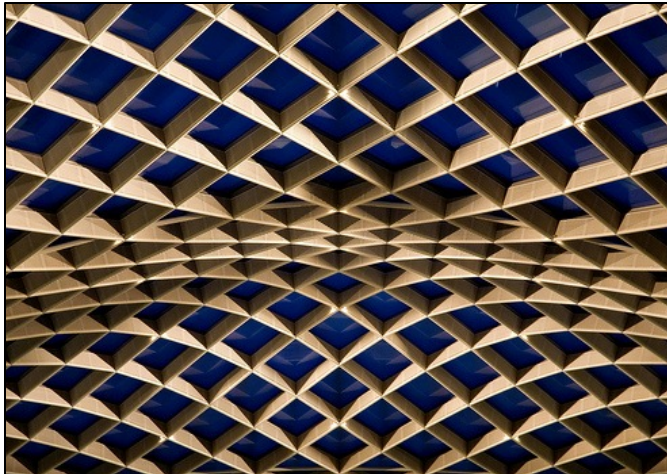
1. **Collaboratively write the principles and guidelines that govern** SI Mobile to enable excellence through personal responsibility and critical, strategic thinking;
2. **Develop an internal commons** of shared and opensource tools, **resources** and training for rapid, responsive best-in-class mobile development;
3. **Realize economies of scale** through shared **infrastructure** and systems that support the core needs of mobile initiatives, products and services across the Institution;
4. **Adopt standards** for interoperable, easily updateable mobile content and cross-platform data management;
5. **Connect SI Mobile initiatives** in a flexible, scalable **framework** that ensures navigability, findability and quality of user experience in both individual mobile products and the SI Mobile ecosystem in aggregate;
6. **Embrace mobile metrics**, audience research, product testing and evaluation to support iterative development and **quality assurance** in SI mobile products;
7. **Expand the SI Mobile team** through fundraising and a business model to create a **sustainable central resource**.

An engaged and empowered community of practice is the foundation for world class mobile initiatives at the Smithsonian. The governance model (Appendix A) reflects the spirit of SI Mobile's overall strategic goals, and aims to enable excellence rather than control creativity or restrict innovation. By embracing the mobile product development principles (Appendix C) they write as a community of practitioners, staff take personal responsibility for projects' quality and success against the Institution's strategic goals, rather than requiring permission and policing from a higher or central power.

An open standards-based approach supports SI's move towards more iterative and agile development processes, away from inflexible waterfall methods and opportunistic projects that may look innovative and garner attention in the short term but rapidly become orphans or dead-ends for investment. Similarly, a flexible information architecture and publishing policy allows units to add mobile guides, games and other content features to pan-Institutional mobile services, while simultaneously creating stand-alone apps and/or mobile websites. As described in the Institution's Web and New Media Strategy, "The use of these shared resources should be voluntary for Smithsonian units, but should be highly desired because the tools and services provided are well conceived, well supported, and make critical work easier and cheaper for participants."⁷ Through tactical openness, collaboration, sharing and standardization, the internal resources of SI Mobile and its shared infrastructure create a whole greater than the sum of its parts, and enable the Institution to realize important economies from the number and scale of its mobile initiatives.

⁷ Smithsonian Web and New Media Strategy, v1 (2009) p. 7, downloadable at http://www.si.edu/Content/Pdf/About/Web-New-Media-Strategy_v1.0.pdf

VI. Next Steps: SI Mobile Annual Objectives & Focus through 2015



The Norman Foster roof of the Robert and Arlene Kogod Courtyard at the Donald W. Reynolds Center offers a visual model of the network of platforms, initiatives, communities and conversations that mobile helps connect in the Smithsonian in the 21st Century.

In the 2010 mobile strategic planning workshops and ongoing work with the units, Smithsonian staff identified the main objectives that they hope mobile can help the Smithsonian achieve. As the workshop facilitators from Forrester pointed out, some of these lend themselves immediately to the capacity of both mobile platforms and the Institution, so should be considered stage 1 objectives for early mobile initiatives. The other objectives require the development of expertise, content, markets, and/or enhanced functionality of mobile platforms, so will evolve over a slightly longer-term. Regardless of the time horizon, SI mobile initiative will require investment both at the project level, and in central resources and infrastructure.

It should also be noted that the only constant in the mobile market is change; the Institution's priorities, objectives, and means available to achieve them will evolve with the changing platforms and technologies at our disposal. Both project and overall strategic planning should, therefore, focus primarily on the 2-3 year horizon, and include contingencies in both the budgeting and timetabling of initiatives.

Stage 1 (through FY 2011)

Objectives:

- Increase mobile engagement with SI
- Improve the quality of the visitor experience online and on-site
- Increase awareness of the Smithsonian's mobile offerings
- Enhance the Smithsonian's Brand

Activities: FY 2011 was our initial period of experimentation and saw a range of 20 mobile initiatives that began to map out the key strengths, weaknesses and potential of the various mobile platforms, as well as enhance both the mobile experience of the Smithsonian, its visibility and its brand. With seed funding from generous Smithsonian National Board members, early projects yielded important experience and learnings that have both informed the strategic plan for mobile at the Institution, in particular by refining our key tactics (section VI above), and laid the cornerstones for SI Mobile's infrastructure, tool kit and best practice library – all primary resources for achieving the strategic goals. Most importantly, a tightly-knit community of mobile practice formed among SI staff in this period, sustained by weekly informal meet-ups, an internal and external wiki for information sharing and collaboration, quarterly classes and an end-of-year review of key learnings from our mobile projects to date.

Ten Notable Achievements in Stage 1 of SI Mobile:

1. Seven mobile websites and thirteen mobile applications have been launched across the Institution, with dozens more in development. These have tested a wide range of mobile content and approaches, from games and highly specialized “point apps” to museum and exhibition mobile sites to the pan-Institutional guide that is developed collaboratively with our visitors: the *Smithsonian Mobile* cross-platform app and mobile website.
2. Mainstream international and technical press have widely reported on and celebrated the Smithsonian’s early mobile achievements.
3. The Institution’s legal and working relationship with Apple developed into a highly productive partnership that led to all of the Smithsonian’s iOS apps published in 2010 and 2011 being featured in iTunes, dramatically increasing their visibility and download numbers. The Institution was also able to negotiate an Enterprise-level license, that makes developing apps and publishing mobile apps for internal use easier. OFEO was the first of the Smithsonian units to take advantage of the Enterprise license, developing a mobile app for use by staff.
4. In addition, a central iTunes U account was established for the Smithsonian and Apple’s team worked with Smithsonian staff to develop workflows and resources for making the Institution’s use of iTunes U more effective and visible to the public, both at the unit and central resource levels.
5. An opensource CMS and an opensource library of code for mobile crowdsourcing were developed as part of the Smithsonian Mobile and Access App initiatives. This resource can now be reused and further developed by future mobile projects at the Institution and beyond, affording great cost and time savings while enabling flexibility and innovation.
6. A vision, strategy and mobile product development principles (Appendix C) were developed and adopted by practitioners at the Institution, and became a referent for mobile strategic planning at other cultural organizations around the world.
7. A plan for using mobile to increase accessibility at the Institution was developed in collaboration with the Department for Accessibility and was presented to the Secretary’s Committee on Accessibility.
8. A governance model (Appendix A) for mobile was developed by the community of mobile practitioners at the Smithsonian.
9. A business plan (Appendix B) was created to sustain the Institution’s early mobile projects and scale up support with the increasing number and ambition of initiatives.
10. A tightly-knit and mutually-supportive community of practitioners developed around mobile at the Smithsonian and spread throughout Washington DC cultural organizations and beyond. Meeting regularly in person and online, this community consists of museum professionals, students and volunteers and at the Smithsonian taps into related groups, including the Outreach Skunkworks, the Webmasters, the Web and New Media Strategy group, and the Social Media meet-ups. A “hard-core” of mobile leaders at the Smithsonian named themselves the “SI Mobilizers” and share best practices and ideas through collaborative wikis, Twitter, and courses and talks. The SI Mobile community proves the sustainability and power of non-hierarchical, distributed networks by supporting one another and advancing the quality of mobile initiatives at

the Institution with a minimal central organizing team (SI Mobile's paid staff is currently limited to a single person) and no dedicated annual budget.

Stage 2 (FY 2012)

Objectives:

- Further develop SI Mobile communities and collaboration
- Foster education and create new learning opportunities on mobile platforms
- Fundraise to put in place an expanded SI Mobile team, business model and sustainable resources for SI Mobile initiatives and core infrastructure and activities
- Advocate and facilitate the installation of a free, public wifi network throughout the Smithsonian's galleries and public spaces

Activities: In FY 2012 the Smithsonian can build on its mobile experience to undertake more and more ambitious mobile initiatives with greater professionalism and efficacy. In 2012 an expanded SI Mobile team can provide quick and efficient mobile design, development and project management services to SI units at below market rates, enabling mobile to scale up at the Institution. The installation of free public wifi throughout the Institution's galleries and public spaces is also critical to enabling continued mobile innovation and quality of on-site visitor experiences. Collaboration and community-building tools initially forged in Stage 1 can be honed for greater ease and diversity of use with the help of investment, partnerships and improved infrastructure. Key among the communities that can be expected to emerge in this period are new mobile learning collaborations that help reinvent education at the Smithsonian for the 21st century and connect formal and informal learning communities globally.

Stage 3 (FY 2013)

Objectives:

- Offer services to support staff
- Roll out on-site mobile device services and distribution systems in Smithsonian museums
- SI Mobile business model begins to yield significant subsidies for running costs

Activities: By Stage 3 (FY 2013) the infrastructure, resources and know-how of technical staff should be developed to a degree that will directly support and enable the research and other work of Smithsonian employees and volunteers. With an expanded core SI Mobile team in place, the Smithsonian's mobile projects will enjoy greater speed and economy in their development. Internally-generated revenues from these initiatives both represent a cost-savings for project budgets and defray the SI Mobile team's overheads. In stage 3, mobile devices will be available on-site in the Smithsonian's museums for visitors who do not have their own.

Stage 4 (FY 2014-15)

Objectives:

- Acquire new audiences
- Increase revenue

Activities: By Stage 4 (FY 2014-2015) SI Mobile reaches full maturity as a community of practice, realizing “network effects” from investment in mobile resources and expertise. At this stage, the Institution will be in a position to undertake the enormous but rewarding tasks of using mobile to attract both new audiences to the Institution, and regular direct revenues from mobile products and services.

In Conclusion: Mobilizing the Smithsonian

The Smithsonian has always been “the people’s Institution”, built through partnerships with citizen scientists, volunteers and others since its founding days. The Smithsonian’s five-year plan prioritizes broadening access to the Institution worldwide through “next-generation technologies that speak to ‘digital natives’ who expect to be reached online.”⁸ Mobile is integral to the Institution’s Web and New Media Strategy and a key means of delivering the value of the Smithsonian’s Digitization and Brand Experience Initiatives.

At the end of its first phase of development, momentum is strong behind mobile at the Smithsonian and the Institution is recognized globally as a leader in mobile best practice and strategy. We have gained important experience and cultivated supportive networks both internally and with other cultural institutions and mobile developers. Productivity with a limited team and resources has been maximized with excellent results. In order to continue and build on this success, we look forward to recruiting critical financial support and investment in the SI Mobile business model in FY 2012.

This strategic plan for mobile aims to unlock the limitless potential of the Smithsonian when its assets are blended with the innovations that mobile technologies make possible. It recognizes that the impact of mobile is not limited to playing a connective or supporting role for existing platforms and initiatives. Much less is mobile a simple translation or re-presentation of the Institution’s content and resources on mobile devices: a rebroadcasting of existing messages through new channels. Rather, mobile is a disruptive technology that is already fundamentally shifting how the Institution does business, how its global audiences connect to the Smithsonian and what it means to them. With mobile as the connective tissue uniting its initiatives, communities, and conversations, the Smithsonian will fulfill its mission for the increase and diffusion of knowledge in the 21st century as a whole much greater than the sum of its parts.

⁸ The Smithsonian Institution’s Strategic Plan 2010-2015, Digitization Strategic Plan, and Web and New Media Strategy can all be downloaded at <http://si.edu/About/Policies>

Appendix A: SI Mobile Governance

The proposed governance framework for mobile at the Smithsonian builds on the strong community of practice already engaged at SI and the communications platforms in place, including the Welcome Wednesday weekly meet-ups, the Smithsonian Webstrategy wiki, the internal Sharepoint wiki, as well as an array of courses, talks and related resources. This model aims to create new, more professional structures for implementing the Smithsonian's mobile strategy and guiding mobile initiatives without losing the collaborative nature and nimbleness of SI Mobile's early community and initiatives. Reflecting the spirit of SI Mobile's overall strategy and vision, this model enables excellence rather than controlling creativity or restricting innovation. The community of practitioners jointly agree the guidelines and product development principles against which SI mobile products and projects will be measured. This approach develops critical thinking and strategic planning skills, and encourages staff to take personal responsibility for projects' quality and success against the Institution's strategic goals, rather than requiring permission and policing from a higher or central power. Coupled with the SI Mobile business model (Appendix B), this framework is more flexible and low-cost in terms of time, overheads and processes in order not to slow down individual initiatives and unit strategy while achieving economies of scale and network effects for mobile across the Institution.

SI Mobile Governance Meetings

Three kinds of meetings throughout the year convene stakeholders to make policy recommendations, decisions, and review projects to capture and disseminate best practice in mobile design and development:

- 1. Annual mobile strategy summit (2 days at SI) includes:**
 - a. Webcast presentation of annual report on mobile achievements and the year ahead by Head of Mobile Strategy and Initiatives;
 - b. Day-long meeting with SI mobile practitioners to discuss and develop recommendations for the mobile road map, mobile policies, standards, tech notes, best practices, and any revisions required to the overall mobile strategy. Mobile practitioners volunteer to attend this meeting on the model established by Welcome Wednesday and the Mobile Governance workshops.
 - c. Half-day meeting of Head of Mobile Strategy and Initiatives with designated senior leaders and stakeholders to review proposals developed by Practitioners on Day 1. Head of New Media Strategy and Initiatives is responsible for follow-up and answering any questions the arising from this meeting.
- 2. Quarterly mobile project reviews:** In a half-day session led by the Head of Mobile Strategy and Initiatives, mobile projects from the preceding quarter are reviewed and discussed by SI mobile practitioners with an eye to deriving best practice, offering advice, and sharing tips and experience to improve the overall quality of SI mobile

products and initiatives. The Head of Mobile Strategy and Initiatives is responsible for capturing, archiving and disseminating the learnings from the quarterly reviews.

3. **Regular mobile meet-ups (Welcome Wednesdays):** Two to four times per month, the Head of Mobile Strategy and Initiatives convenes informal meet-ups for SI mobile practitioners to share information and brainstorm new projects. Practitioners are encouraged to convene their own meet-ups and other opportunities to collaborate and continue the mobile conversation outside these regularly-scheduled events as well.

SI Mobile Governance Team

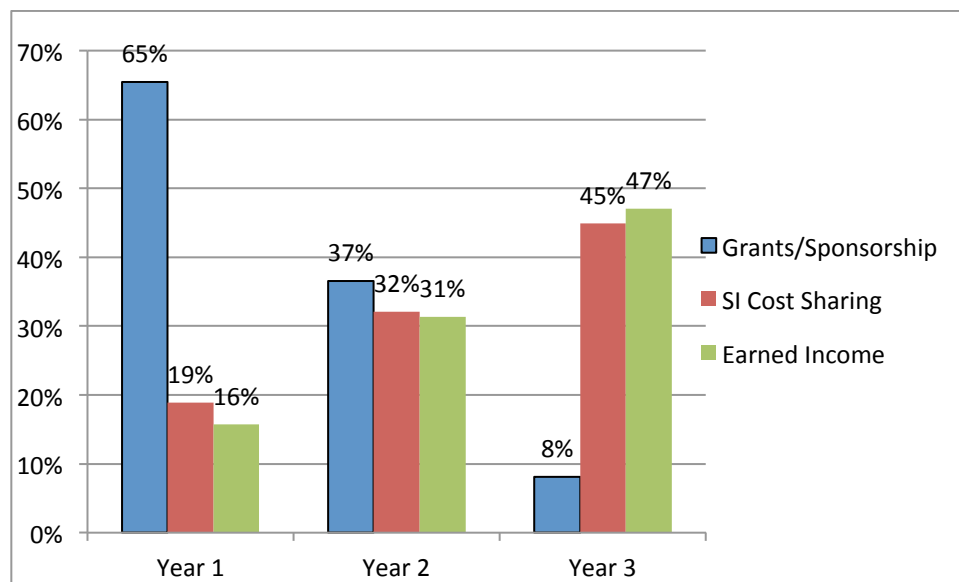
Instead of top-down governance, SI Mobile aims to draw on the power of peer networks to create a more agile and responsive grassroots support structure for mobile initiatives at the Smithsonian. With this increased flexibility comes increased responsibility: SI mobile practitioners who volunteer to be part of the SI mobile governance processes are expected to participate in the following ways:

- Knowing SI Mobile strategy, goals, standards, policy, best practice, and priority projects;
- Proposing, helping develop, and advocating mobile policy with leadership from the Head of Mobile Strategy and Initiatives;
- Proposing, helping develop, and ratifying mobile standards;
- Reviewing mobile projects and providing evaluation/advice both during the iterative development process, and at the project's end;
- Where warranted, recommending take-down of mobile products that don't meet SI standards or comply with policy;
- Referring projects to other policy/governance bodies and advisors, e.g. TRB, ITMC, OCON, OGC, SE, OP&A, OPA (for marketing, branding and press communications)
- Advocating SI Mobile inside and outside the Smithsonian in order to increase awareness with staff, senior management, funders, and potential partners.
- Teaching and sharing best practice with SI staff and others through conferences, workshops, online and in-person courses.

Appendix B: SI Mobile Business Model

Over the next three years, SI Mobile seeks to fund its central infrastructure and activities from a combination of grant, in-house (SI-funding), and income earned through internal sub-contracting and external consulting by an expanded SI Mobile team.

The business model aims to increase the percentage of earned income in the mix over the three years, creating central funds for building core mobile capabilities (a mobile “center of excellence”). Over the first three years of this model, the funding projections shift responsibility for fundraising from central sources to project initiators, replacing grants and sponsorship with a more entrepreneurial earned income source, as shown in the chart below:



As the need for central fundraising for mobile infrastructure and management diminishes, this effort may be redirected towards creating a central innovation fund to reward and encourage mobile projects that meet SI Mobile strategic goals and priorities.

In addition to technology infrastructure and management processes (TRB, IMTC, etc.) already provided, core services can be offered by SI Mobile to Smithsonian clients at world class quality but below-industry rates. These include:

1. Project management
2. Mobile product development
3. Mobile product design

The central SI Mobile team will lead by example and also help generate significant economies of scale by sharing and implementing mobile best practices and standards in projects across the Institution, creating reusable mobile assets, and maintaining code repositories. In addition to earned income, investment from SI in central mobile infrastructure will need to rise annually to support the maintenance of the rapidly growing number of mobile projects and products over the three-year period.

The benefits of this investment model support our overall SI Mobile strategic goals by:

- Broadening access and increasing audience engagement, including new opportunities for learning;
- Creating network effects among SI communities, platforms and initiatives;
- Improving the quality of Smithsonian mobile products and experiences;
- Enhancing Smithsonian organizational capabilities;
- Generating cost savings through collaborative efforts (standards, guidelines and reusable mobile assets).

Appendix C: SI Mobile Product Development Principles

The product development objectives are intended as a reference for specific SI Mobile development projects, providing principles that should guide both product and mobile experience design and architecture decisions.

1. Mobile products should be **accessible** and used to enable access to the Smithsonian experience and resources for people of all abilities.
2. Mobile projects should expand and create **new opportunities for engagement**, not seek to reproduce existing ones on mobile devices.
3. Mobile should be understood as **social media** and projects should leverage its ability to create conversations, communities, and collaborations both alone and in combination with other platforms.
4. Wherever possible, a **mobile website** built on a standards-based content management system should be at the core of every mobile application project.
5. Digital content should be conceived for **cross-platform** use and re-use according to mobile content standards, and delivered using quality metadata and central SI web services.
6. Wherever possible, existing mobile **code modules** should be reused from the SI Mobile repository: avoid writing new and/or dedicated code and using proprietary or dedicated systems.
7. Whenever possible, make code, tools, best practices and other learnings from SI Mobile projects **freely available** to others to reuse.
8. For quality and consistency of experience, SI mobile initiatives should use **standard interfaces** and include clear, easy routes to other SI mobile products and platforms.
9. Embed **metrics** and analytic tools in every mobile product, and include audience research and product evaluation in every mobile project to inform iterative development and ensure quality.
10. Every mobile project or product must include a commercial or other plan for its **sustainability** and maintenance.