Reopening the Cultural Sector in U.S. Cities

Photo: Matthieu Joannon/Unsplash
CULTURE IS A SIGNIFICANT DRIVER OF ECONOMIC ACTIVITY, DIRECT AND RELATED EMPLOYMENT, TOURISM AND NEIGHBORHOOD IDENTITY IN THE U.S.

IN 2017, THE PRODUCTION OF ARTS AND CULTURAL GOODS AND SERVICES:

• Contributed $877.8 billion to the U.S. economy or 4.5% of GDP, more than construction, transportation and warehousing, travel and tourism, mining, utilities, and agriculture as industries

• Employed over 5 million wage-and-salary workers across the country with earnings of more than $405 billion

• Exported $72.6 billion, roughly $30 billion more than imported, providing a positive trade balance

REOPENING CULTURE: WHAT’S THE PROBLEM?

• Early reopening guidance was not sector-specific and did not acknowledge differences in cultural venues, grouping indoor exhibit-based venues (museums), fixed-seating venues (theaters and concert halls) and outdoor facilities.

• While sector-specific reopening guidance is now more widely available, much of it requires significant changes to operations in response to directives that are still in flux.

• In addition, overlapping layers of authority and expertise are not being coordinated around reopening including:
  o State and local regulations and related public health guidance
  o Recommendations from industry associations and advocacy groups
  o Local networks of affected venues
RESEARCH SHOWS CONSUMERS INTEND TO VISIT CULTURAL INSTITUTIONS WHEN THEY REOPEN:

- Higher demand - Outdoor attractions and venues that allow greater freedom of movement (e.g., museums, botanical gardens, zoos, outdoor performances)
- Lower demand - Indoor spaces with fixed seating (e.g., cinema, theaters, concert halls)

TO FEEL SAFE, CONSUMERS WILL EXPECT TO SEE SIGNIFICANT OPERATIONAL CHANGES. AMONG THE MOST FREQUENTLY CITED WERE:

- Ability to socially distance at the venue
- Limitation on number of visitors
- Requirement for visitors and staff to wear face masks
- Observable cleaning protocols including availability of on-site hand sanitizer

Source: Studies of consumer sentiment by colleendilen.com, Association of Leading Visitor Attractions (ALVA) UK
REOPENING CULTURE: INTERNATIONAL PRACTICES TO DATE

Source: World Cities Culture Forum and public reporting

**Capacity Limits**
- Entrance quotas
- Timed ticketing for staggered entrance
- Time limited visits (e.g., two hours)
- Extended opening hours to stagger visits
- Restricted access for small rooms/spaces
- Distanced seating for household groups

**Venue Hygiene**
- Frequent cleaning regimen, particularly for high-touch areas/items
- Placement of no-touch hand sanitizer dispensers at all entrances/exits
- Limited usage of high-touch amenities (e.g., water fountains, revolving doors)

**Ticketing & Reception**
- Shift reception services outdoors
- Build plexiglass shields for all visitor services
- Online-only ticketing
- No-touch scanning for tickets
- Designate 6-foot spacing for queues

**Visitor Requirements**
- Require face masks
- Require 6 ft distance from non-household members
- Temperature checks / thermal scanning
- Visitor registration to assist with contact tracing
- Registration of health information via smartphone app in coordination with local health officials
- Clear signage warning against visitors entering with symptoms

**Activity Adjustments**
- Suspend or adjust group tours and tour routes
- Limit and guide movement through exhibits to a single direction
- Eliminate audio guides and replace with smartphone app
- Close interactive program elements with high touch surfaces
- Close or restrict concessions and gift shops

**Special Considerations**
- Special policy or opening hours for at-risk visitors
- Special policy for at-risk staff or staff who fall ill
- Temporary quarantine areas on every floor for visitors that fall ill
# Reopening Culture: Venue Considerations

<table>
<thead>
<tr>
<th>Conditions</th>
<th>Indoor Exhibit-Based Venues (museums, galleries, historic sites, aquariums, etc.)</th>
<th>Indoor Fixed-Seat Venues (theaters, lecture/concert halls, cinemas, etc.)</th>
<th>Outdoor Venues (concerts in parks, street festivals, etc.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ability for patrons to socially distance</td>
<td>HIGH</td>
<td>LOW</td>
<td>HIGH</td>
</tr>
<tr>
<td>Ability for patrons to avoid touching surfaces</td>
<td>HIGH</td>
<td>LOW</td>
<td>HIGH</td>
</tr>
<tr>
<td>Ability to control patron flow</td>
<td>HIGH</td>
<td>HIGH</td>
<td>MEDIUM</td>
</tr>
<tr>
<td>Ability to minimize patron contact with staff</td>
<td>HIGH</td>
<td>MEDIUM</td>
<td>HIGH</td>
</tr>
<tr>
<td>Ability for staff to clean frequently during programming</td>
<td>HIGH</td>
<td>MEDIUM</td>
<td>MEDIUM</td>
</tr>
<tr>
<td>Financial viability w/ conditions above</td>
<td>MEDIUM</td>
<td>LOW</td>
<td>MEDIUM</td>
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</table>
# Reopening Culture: U.S. Museum Practices to Date

<table>
<thead>
<tr>
<th>Reopen Date</th>
<th>Museum</th>
<th>Reduced Capacity</th>
<th>Social Distancing</th>
<th>Require Face Masks</th>
<th>Visitor Temp Check</th>
<th>Timed Tickets</th>
<th>Online-Only Ticketing</th>
<th>Hand Sanitizer Stations</th>
<th>Deep Cleaning Measures</th>
<th>Limited Interactive Elements</th>
<th>One-Way Routes</th>
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<tbody>
<tr>
<td>15-May</td>
<td>Houston Museum of Natural Science (TX)</td>
<td>25%</td>
<td>✓</td>
<td>✓</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>?</td>
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<tr>
<td>23-May</td>
<td>Museum of Fine Arts Houston (TX)</td>
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<td>x</td>
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<td>✓</td>
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<tr>
<td>5-Jun</td>
<td>Anchorage Museum (AK)</td>
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<td>✓</td>
<td>✓</td>
<td>x</td>
<td>✓</td>
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<td>✓</td>
<td>✓</td>
<td>✓</td>
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</tr>
<tr>
<td>5-Jun</td>
<td>Children's Museum Houston (TX)</td>
<td>20%</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td>10-Jun</td>
<td>Crystal Bridges Museum of American Art (AR)</td>
<td>30 per 15 min</td>
<td>✓</td>
<td>✓</td>
<td>x</td>
<td>✓</td>
<td>✓</td>
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<td>✓</td>
<td>✓</td>
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<tr>
<td>16-Jun</td>
<td>Arizona-Sonora Desert Museum (AZ)</td>
<td>✓</td>
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<td>✓</td>
<td>x</td>
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<tr>
<td>17-Jun</td>
<td>Louisiana Children's Museum (LA)</td>
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<tr>
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<td>Kimbell Art Museum (TX)</td>
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<td>✓</td>
<td>x</td>
<td>x</td>
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</tr>
<tr>
<td>20-Jun</td>
<td>National Gallery of Art Sculpture Garden (DC)</td>
<td>Max 271</td>
<td>✓</td>
<td>✓</td>
<td>x</td>
<td>✓</td>
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<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>x</td>
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<tr>
<td>22-Jun</td>
<td>International Spy Museum (DC)</td>
<td>✓</td>
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<tr>
<td>22-Jun</td>
<td>Museum of the Bible (DC)</td>
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<td>✓</td>
<td>✓</td>
<td>X</td>
<td>X</td>
<td>✓</td>
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<td>✓</td>
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<tr>
<td>23-Jun</td>
<td>High Museum of Art (GA)</td>
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<td>✓</td>
<td>✓</td>
<td>X</td>
<td>X</td>
<td>✓</td>
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<td>✓</td>
</tr>
<tr>
<td>23-Jun</td>
<td>Museum of Discovery and Science (FL)</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
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<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>25-Jun</td>
<td>Gettysburg Military Park (PA)</td>
<td>50%</td>
<td>✓</td>
<td>x</td>
<td>X</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>?</td>
<td>✓</td>
<td>?</td>
</tr>
<tr>
<td>27-Jun</td>
<td>Eiteljorg Museum of American Indians and Western Art (IN)</td>
<td>50%</td>
<td>✓</td>
<td>✓</td>
<td>X</td>
<td>X</td>
<td>¥</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>?</td>
</tr>
<tr>
<td>1-Jul</td>
<td>Frist Art Museum (TN)</td>
<td>40 per 30 min</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
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<td>✓</td>
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<td>?</td>
</tr>
<tr>
<td>1-Jul</td>
<td>Knoxville Museum of Art (TN)</td>
<td>25 per hour</td>
<td>✓</td>
<td>✓</td>
<td>x</td>
<td>✓</td>
<td>x</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td>1-Jul</td>
<td>Modern Art Museum of Fort Worth (TX)</td>
<td>?</td>
<td>✓</td>
<td>✓</td>
<td>x</td>
<td>x</td>
<td>X</td>
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<td>✓</td>
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</tr>
<tr>
<td>5-Jul</td>
<td>Speed Art Museum (KY)</td>
<td>Max 625</td>
<td>✓</td>
<td>✓</td>
<td>X</td>
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<tr>
<td>6-Jul</td>
<td>Grand Rapids Public Museum (MI)</td>
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<td>✓</td>
<td>X</td>
<td>X</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
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</tr>
<tr>
<td>7-Jul</td>
<td>Kansas Children's Discovery Center (KS)</td>
<td>✓</td>
<td>✓</td>
<td>X</td>
<td>x</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>X</td>
</tr>
<tr>
<td>9-Jul</td>
<td>Henry Ford Museum (MI)</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>X</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>X</td>
</tr>
<tr>
<td>15-Jul</td>
<td>Storm King Art Center (NY)</td>
<td>✓</td>
<td>✓</td>
<td>x</td>
<td>x</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>X</td>
</tr>
</tbody>
</table>

✓ Museum has included measure in their public reopening plan
X Museum has not included measure in their public reopening plan
? No public information available
REOPENING CULTURE: U.S. MUSEUM PRACTICES TO DATE

CONSISTENTLY INSTITUTED MEASURES ACROSS MUSEUMS
- Limiting visitor numbers
- Mandating social distancing & face coverings
- Visible cleaning protocols including hand sanitizer stations

VARIABLY INSTITUTED MEASURES
- Hands-on interactive elements limited by many, though some choose to increase cleaning regimen instead
- Timed ticketing & online-only ticketing instituted by some but not all
- Outdoor-only exhibits & one-way routes instituted by some where space permits
- Visitor temperature checks & symptom surveys instituted by few
• Adopt sector-specific guidelines on reopening that acknowledge differences in cultural venues and visitor experiences at:
  o Indoor exhibit-based venues (museums, galleries, historic sites, aquariums, etc.)
  o Indoor fixed-seat venues (theaters, lecture/concert halls, cinemas, etc.)
  o Outdoor venues (concerts in parks, street festivals, etc.)

• Support consistent, effective messaging to the public about COVID-19 measures at cultural venues

• Develop clear protocols in the event subsequent closures are needed

• Consider the creation of a mark or seal to certify venues that adhere to applicable regulations and public health guidance around reopening

• Include culture in long-term recovery planning recognizing its impact on local economies, identity and quality of life
REOPENING CULTURE
CASE STUDIES
LOCAL CONTEXT

• The Association of Brandenburg Museums allowed its museums to reopen on April 22 with guidelines, but left decisions to the individual institution.

• Most cultural institutions reopened in German states on May 6.

• The Association Guidelines are based on local law which:
  o Prohibit queues in entry spaces
  o Limit 10 people to waiting areas
  o Require a minimum social distance of 1.5m
LOCAL CONTEXT

Highlights from the Brandenburg Museum Association Guidelines include:

Social distancing
• Markings to define the maximum walkable floor space
• Timed electronic ticketing
• Plexi-glass at entry
• Card payment only where possible

Limiting services
• No cloakrooms, only free-standing cloak stands and lockers
• No food or drink provision

Communication
• COVID-19 regulations posted at entry points and in numerous locations inside the museum
• Personnel training on visitor management and COVID-19 measures

Minimum distance of 1.5m is marked out on the museum’s foyer floor © Blmk

Visitors in pairs can each take one end of a selection of poles and ribbons exactly 1.5m long © Blmk
Wiesbaden State Theater is the first major European concert hall to reopen since the pandemic. Hygiene and safety measures include:

- **Personal data and identification**
  - Name, address and phone number of patrons recorded to enable contact tracing
  - Patrons required to have identification

- **Face covering**
  - Masks required for entry, but may be removed once seated

- **Seating**
  - 200 of 1,000 seats available in main theater
  - No fixed seats, only guarantees for particular row
  - One empty row and three empty seats between patrons

- **Facilities and services**
  - No cloakroom
  - One person at a time in the restroom
  - Limited restaurant service
LOCAL CONTEXT

On March 13, the Shanghai Museum and Shanghai Power Station Museum reopened to the public. Both had been closed since late January, when all of mainland China was put under lockdown to contain COVID-19.

Among the measures taken by Shanghai museums include:

• Advance bookings via smartphone apps
• Limits of 2,000 visitors per day and 300 at a time (Shanghai Museum)
• Visitor temperatures checks
• Two-hour limits on visits
RELEVANT GUIDANCE
Since the reopening of cultural venues in Shanghai, Hong Kong and Singapore, the International Committee for Museums and Modern Art (CiMAM) developed guidelines based on the approaches of several Asian cultural venues.

The guidelines are based on four pillars:
• Ensuring the security of visitors
• Ensuring the security of personnel
• Management of infrastructure
• Constant communication with the public

Visitors to Shanghai museums must have their temperatures checked, wear masks and may stay no more than two hours © Power Station of Art, Shanghai
FOCUS ON DOMESTIC TOURISM

• Launch of Visit Shanghai app with nine sectors represented including sports, healthcare, arts and transportation, with incentives and discounts aimed at getting locals to return

• Shanghai Disneyland reopened on May 11 after 107 days of closure

• Starting at 20% capacity, increasing to 5,000 per week until the park reaches 30% capacity
MUSEUM OF FINE ARTS, HOUSTON (MFAH)

- After a two-month closure, MFAH became the first fine arts museum in the U.S. to reopen its doors on Saturday, May 23
- Texas Governor Greg Abbott lifted the state’s stay-at-home order on May 1, which allowed businesses to reopen
- Reopening protocols include:
  - Limiting museum capacity to 25%
  - Face masks for visitors older than 2, and all staff members
  - Temperature checks upon entry
  - Social distancing
  - No food or beverage service
  - Cashless payment only
  - No large bags or coat check service

REOPENING CULTURE CASE STUDY: HOUSTON, TEXAS
SEALS TO CERTIFY SAFETY

- Some governments, local municipalities and tourism bureaus are beginning to offer certifications to businesses that commit to following government regulations and public health guidance as part of reopening.

- Specific requirements vary by jurisdiction, but many rely upon self-certification from businesses that have:
  - Reviewed the relevant state and local guidelines
  - Submitted a formal business reopening plan
  - Provided a written commitment to continue to follow applicable guidance post-reopening
REOPENING CULTURE: INTENT TO VISIT

“PEOPLE INTEND TO RETURN TO ‘NORMAL’ VISITATION PATTERNS WITHIN THREE MONTHS, AND INTENTIONS TO VISIT WITHIN ONE MONTH ARE QUICKLY RECOVERING.”

- 16 weeks of monitoring adult public’s intention to visit 84 unique cultural institutions in the U.S. including museums, theaters, aquariums, and symphonies, shown in two-week intervals
- Starting sample size of 5,892, has grown over the 15-week period to 8,000+ participants
- Values on the Y axis represent the certainty of their intent to visit, with “4” representing no intent to visit and “100” suggesting that they cannot wait for the doors to open

Source: colleendilen.com
“PEOPLE INTEND TO VISIT CULTURAL ORGANIZATIONS AGAIN … BUT DEMAND FOR ORGANIZATION TYPES IS BEING REDISTRIBUTED.”

- Outdoor attractions and institutions that allow greater freedom of movement will be in high demand.
- Closed spaces with minimal visitor movement - concert halls and theaters - will have far less demand.
- Values on the X axis represent likelihood to resume visitation with "50" representing no change – i.e., intent as if COVID-19 never happened.

Source: colleendilen.com
"What would make you feel safe and comfortable going to a museum, aquarium, theater, zoo, or concert again?"

Multiple choice, select all that apply, choices populated by lexical analysis

<table>
<thead>
<tr>
<th>Survey Date</th>
<th>Availability of Coronavirus vaccine</th>
<th>Mandatory face coverings</th>
<th>Seeing others visit</th>
<th>Ability to be outside/outdoors</th>
<th>Availability of treatments/therapies</th>
<th>Government lifting travel, movement, access restrictions</th>
<th>Organizations choosing to re-open</th>
<th>No significant changes necessary - I feel safe and comfortable</th>
<th>Availability of hand sanitizer</th>
<th>Limits on crowds (e.g. limit attendance)</th>
<th>Avoiding long lines of people</th>
<th>Excessive hours for vulnerable populations</th>
<th>Antibody testing/immunity passport program</th>
<th>Knowing facility cleaning procedures</th>
<th>Onsite health monitoring (e.g. taking guest temperatures)</th>
<th>Elimination of onsite food service</th>
</tr>
</thead>
<tbody>
<tr>
<td>June 8</td>
<td>28.7%</td>
<td>53.8%</td>
<td>44.8%</td>
<td>48.5%</td>
<td>39.5%</td>
<td>21.9%</td>
<td>32.7%</td>
<td>15.8%</td>
<td>24.1%</td>
<td>21.7%</td>
<td>23.5%</td>
<td>27.3%</td>
<td>11.9%</td>
<td>7.2%</td>
<td>10.5%</td>
<td>7.1%</td>
</tr>
<tr>
<td>June 29</td>
<td>27.1%</td>
<td>52.4%</td>
<td>44.8%</td>
<td>46.6%</td>
<td>35.5%</td>
<td>21.9%</td>
<td>32.7%</td>
<td>15.8%</td>
<td>24.1%</td>
<td>21.7%</td>
<td>23.5%</td>
<td>27.3%</td>
<td>11.9%</td>
<td>7.2%</td>
<td>10.5%</td>
<td>7.1%</td>
</tr>
</tbody>
</table>

Source: colleendilen.com

"SHORT OF A VACCINE, FACE COVERINGS ARE OFFICIALLY THE MOST IMPORTANT FACTOR TO MAKE PEOPLE FEEL SAFE AGAIN. IT’S ALSO THE HIGHEST RANKED FACTOR WITHIN AN ORGANIZATION’S CONTROL."

- More than 70% of potential visitors say that mandatory face coverings will make them feel safe
- Many will still take a “wait and see” approach
- Cultural institutions will have to prioritize safety measures and communicate about them effectively
CULTURE REOPENING: VISITOR PERCEPTIONS

Distancing and cleanliness measures strongly welcomed by the market, but attractions must be seen to be delivering and policing these effectively – notices alone are not enough. A quarter will feel less comfortable with introducing PPE, especially if compulsory for visitors.

<table>
<thead>
<tr>
<th>Measures</th>
<th>Much more comfortable</th>
<th>A little more comfortable</th>
<th>Would make no difference</th>
<th>Less comfortable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distancing measures in queues and around site</td>
<td>39</td>
<td>43</td>
<td>14</td>
<td>3</td>
</tr>
<tr>
<td>Limiting numbers of visitors on site at one time</td>
<td>38</td>
<td>41</td>
<td>16</td>
<td>3</td>
</tr>
<tr>
<td>Maximising distance from staff</td>
<td>26</td>
<td>48</td>
<td>24</td>
<td>4</td>
</tr>
<tr>
<td>Hand sanitiser at entrance and around site</td>
<td>41</td>
<td>41</td>
<td>17</td>
<td></td>
</tr>
<tr>
<td>Staff visibly cleaning surfaces</td>
<td>36</td>
<td>44</td>
<td>19</td>
<td></td>
</tr>
<tr>
<td>Notices on site reassuring visitors about cleaning etc.</td>
<td>24</td>
<td>47</td>
<td>27</td>
<td></td>
</tr>
<tr>
<td>All staff wearing masks or gloves</td>
<td>18</td>
<td>38</td>
<td>32</td>
<td>12</td>
</tr>
<tr>
<td>Compulsory for visitors to wear masks</td>
<td>16</td>
<td>29</td>
<td>31</td>
<td>23</td>
</tr>
<tr>
<td>Notices on website about measures on site</td>
<td>27</td>
<td>46</td>
<td>25</td>
<td>2</td>
</tr>
<tr>
<td>Taking temperature of all visitors on entering</td>
<td>24</td>
<td>31</td>
<td>31</td>
<td>14</td>
</tr>
</tbody>
</table>

Source: Association of Leading Visitor Attractions (ALVA), UK
CULTURE REOPENING: VISITOR ANXIETY

Toilets, indoor catering and interactives are in the ‘high use, high anxiety’ area – so need to be priorities for attractions in their pre-visit communications, as well as on-site actions.

Wave 3: Level of anxiety among those who would ordinarily use

Source: Association of Leading Visitor Attractions (ALVA), UK
MUSEUMS AND COLLECTING INSTITUTIONS

• American Alliance of Museums’ Preparing to Reopen: COVID-19 Resources for the Museum Field offers a resource guide on museum reopenings and sample reopening plans

• American Industrial Hygiene Association’s Back to Work Safely Museums offers guidance for small and mid-size museums with an emphasis on facility hygiene and employee and visitor wellness

PERFORMING ARTS AND THEATER

• American Repertory Theater & Harvard T.H. Chan School of Public Health’s Roadmap for Recovery & Roadmap for Recovery and Resilience for Theater has an emphasis on facilities and building infrastructure

• Event Safety Alliance’s Reopening Guide offers comprehensive guidance for event professionals and presenters of performing arts

• Performing Arts Consortium’s Guide to Reopening Theatrical Venues focuses on risk mitigation measures for performing arts centers

SMALL VENUES, STUDIOS AND REHEARSAL SPACES

• American Federation of Musicians’ Returning to Work Safely focuses on individual artists and operations at small live venues, studios and rehearsal spaces
REOPENING CULTURE: QUESTIONS?

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