

CASE STUDY: ASSET PLANNER FOR THE ARTS

STRATFORD PERTH MUSEUM

The Stratford Perth Museum has become a cultural hot spot in the community. From exhibiting the original written works of Shakespeare to hosting a “Hoptoberfest” craft beer festival, the museum has made a tremendous impact on arts and culture in the region.

But where does asset management “fit in” to the mix for this museum?

All the museum’s events are held within and around a unique building structure. The Stratford Perth Museum is made up of two different spaces: a Victorian buff brick house built in 1870 and a modern extension built in 2009. Mixing the old with the new, the extension onto the Victorian home provides more room for large displays while the heritage home echoes the rich history of the region. Managing these two separate building components, with new and old assets, presents its own set of challenges. Enter Asset Planner for the Arts.



Asset Planner for the Arts is a cloud-based asset management tool used by arts facilities across the province. [Read more about Asset Planner.](#)

Searching for an asset management tool

The Board of Directors and General Manager John Kastner were searching for an asset management tool that would meet the needs of the entire facility... but they didn’t really know where to start. “We were talking about who do you go to, do you go to an engineer? We spoke to a couple of home inspectors and were setting up appointments, and we said you know what, Asset Planner is the thing for us,” shares John. “Not to cut your grass, but this was exactly what we were looking for.” Knowing they would not have to seek out vendors to build their asset management software from scratch was an appealing part of the program for John. The Stratford Festival, who also uses the tool to manage their theatre spaces, referred the Stratford Perth Museum to Asset Planner.

Both Finance Committee Chair Randy Matthews and John have found Asset Planner helpful in supporting cases for funding and planning upcoming repairs. The tool allows them to see all their assets

in one place, which is something arts managers are not always able to glean from a simple site walkthrough in their facility.

Engineer walk through of the museum

One of the unique aspects of the program includes a site walkthrough from an engineer. John met with Bryn Jones, Director of Facilities Management with Walter Fedy, who conducted an in-person assessment of the facility. “We met Bryn Jones and he had his iPad with pictures of the facility, mechanicals and assets that make up the building. It was a unique process,” recalls John. The on-site walkthrough provided an assessment of the museum’s assets, which were documented and photographed. This information is then uploaded to Asset Planner and was ready to use when John and Randy first logged on.



This created a starting point for the museum to work with as they planned upcoming building repairs. “Our concern was how do we create that base that we can take and adjust to what the realities are and what our requirements are. [Asset Planner] got us that base without any effort on our part,” notes Randy. One of the aspects of Asset Planner that has been useful for the museum is the ability to make changes to information on timelines and budgets. They already have plans to update the replacement of their old heaters when two new furnaces are installed next month.

Make better decisions on building repairs

Prior to using Asset Planner, John and Randy took more of a reactive approach to facility repairs. For instance, the museum had to repair a basement wall with water damage due to old eaves troughs. If they had known to replace the eaves troughs 3 to 4 years ago, the repair costs may not have been as high as they were. Now the Stratford Perth Museum is reaping the rewards of planning ahead. Randy mentioned the museum might have postponed repairs needed in the next year if they were not using an asset management system. “And we likely wouldn’t have the money to do [the repairs] if we didn’t plan everything out,” notes Randy.

Asset Planner is helping the museum make better decisions on building repairs. John and Randy received a grant to install two new furnaces and an air-conditioning unit in the next few months. The heat vents were initially going to cover only part of the facility – until they logged on to Asset Planner and changed their plans. They realized that by extending the heat vents into areas where electrical wall heaters are used, they would actually save more on hydro costs. “I am not sure if we would have thought of that if we didn’t have Asset Planner in front of us,” shares John. With this asset management tool, John and Randy were able to identify cost savings and plan accordingly before installing new equipment. As a result, they will use less energy and they no longer need to worry about replacing the electric wall heaters.

Arts managers can customize their data to reflect current assets in Asset Planner – one of the features John and Randy really like about the tool. In the next year, the museum will be getting new windows in the Victorian home that makes up half their facility, but the windows need to optically reflect the heritage building. While Asset Planner projected replacement costs using estimates for vinyl clad windows, they need to install windows that look like they are from 1870 which could cost two to three times as much. With Asset Planner, they can easily adjust cost projections for their upcoming window replacements as well as future repairs, allowing the museum to budget and plan ahead accordingly.

Support cases for Funding

Asset Planner has also helped the Stratford Perth Museum support cases for funding. The museum is supported in part by the County of Perth and the City of Stratford, and operates with 45% of self-generated revenue. When the museum approached the City and County to renew their 10-year cycle of funding, they leveraged Asset Planner’s capital projections. Tools like Asset Planner help demonstrate their ability to manage capital expenses. John notes that “one of the things they have been concerned about in the past is what if there is a major capital expense in the museum [...] through tools like Asset Planner we can set aside money for capital.” Using projections from the tool, the museum demonstrated they have contingency plans in place, are actively planning for upcoming repairs and can cover their own costs in the event an unexpected major capital repair needed. These data projections helped John and Randy make a strong case to their funders and reflected the museum’s stability as an organization.

Financial managers can prepare for contingencies by customizing cost estimates for building repairs. Randy has plotted in some “cushioning” in the budget for those unexpected repairs that can catch arts managers off guard. “I am always setting a threshold regardless of the maintenance that’s planned out, so that if we do get something unexpected, it’s not an issue,” shares Randy. “I think that’s important for organizations to keep in mind and to know.” While Asset Planner is designed to prevent surprise repairs, financial managers and arts managers can plot in extra costs for contingency planning as an extra preventive measure.

In summary

The Stratford Perth Museum has leveraged Asset Planner for the Arts for all its benefits. The tool is helping them track building assets and make better decisions for upcoming repairs. It also helped demonstrate to their funders that they are financially stable when it comes to building maintenance and as an organization as a whole. So while the museum continues to host arts and cultural events in its space, John and Randy can rest easy knowing they have planned ahead to keep the Stratford Perth Museum in tiptop shape for years to come.