



**CITY OF BIRMINGHAM
MUSEUM BOARD AGENDA
556 W MAPLE
Thursday, January 7, 2016
6:30 PM**

***Mission Statement:** The Birmingham Historical Museum & Park will explore meaningful connections with our past, in order to enrich our community and enhance its character and sustainability. Our mission is to promote understanding of Birmingham's historical and cultural legacy through preservation and interpretation of its ongoing story.*

1. Roll Call

2. Introduction of Guests

3. Approval of the Minutes

A. Minutes of November 5, 2015

4. Announcements

A. Correction of March Museum Board Meeting Date

5. New Business

A. Museum Board Contact Information

B. Agenda Structure

6. Unfinished Business

A. Museum Name Change

7. Communication and Reports

A. Director Report

B. City Commission Long Range Planning Session Report

C. Member comments

D. Public comments

6. Adjournment

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Draft



**CITY OF BIRMINGHAM
MUSEUM BOARD
MEETING MINUTES
THURSDAY, November 5, 2015
6:30 PM**

Members Present: Russ Dixon, Tina Krizanic, Marty Logue, Gretchen Maricak, Kate Montgomery, Caitlin Rosso, Jeff Wilmot

Student Members Present: none

Members Absent: none

Administration: Museum Director Leslie Pielack

Guests: George Stern

Mr. Dixon called the meeting to order at 6:30 PM.

**Approval of the Minutes
Minutes of October 8, 2015**

MOTION: by Maricak, seconded by Wilmot:

To approve the minutes of October 8, 2015, as amended.

VOTE: Yeas, 7
Nays, 0

Communication and Reports

- A. Ms. Logue reviewed the Joint Fundraising Committee Report and updated the funds yet remaining to be raised to \$5032.00. Mr. Wilmot received some additional business donations. Ms. Logue and Mr. Dixon suggested that the Joint Fundraising committee has completed its task, and that the Museum Board will now take responsibility for completion of the project from this point.
- B. Museum Director Pielack reviewed the Director's Report.

Unfinished Business

A. The board reviewed a list of suggested alternative names and reduced the list to five.

MOTION: by Wilmot, seconded by Montgomery:

To approve the following five alternative museum names, to be used to seek public input to consider a name change for the museum that is better aligned with the museum's mission and audience:

- The Birmingham Museum
- The Museum of Birmingham
- Birmingham Museum & Archives
- The Birmingham Cultural Museum
- The Birmingham Heritage Center

VOTE: Yeas, 7
 Nays, 0

Director Pielack will prepare a ten-item Survey Monkey electronic survey, which is free, to allow the public to voice their opinion on the museum's name, as well as other information. The survey can be sent to the contact list for the City of Birmingham, be posted in the museum's Facebook page, and broadcast through the museum's email contacts. Other organizations, such as the Baldwin Public Library, will be asked to link to the survey from their web page as well. A press release will also go out, and other means of making electronic contact to gain a broad source of feedback without spending any money on data collection. The Museum Board will review the data at their January meeting.

Communication and Reports, continued

C. Mr. Dixon would like to discuss forming a committee under the Museum Board for the purpose of conducting research on Greenwood Cemetery, perhaps in preparation for a publication, which the Museum Board agreed to add to January's agenda. He also suggested a review of agenda procedures be an item on January's agenda, and asked the Museum Board to review the recent city workshop training video to aid the discussion, to which the board agreed. Ms. Maricak inquired about getting an updated Museum Board member contact list. Mr. Wilmot suggested the bell construction project may benefit from donated labor from volunteers when construction begins.

D. Mr. Stern shared his opinion that the new city commission may request data and analysis for matters the Museum Board may bring before them, and offered his opinion regarding next year's focus for the Museum Board.

Mr. Dixon adjourned the meeting at 7:15 p.m.



Leslie Pielack <lpielack@bhamgov.org>

Agenda Sequence Suggestions

1 message

RussWDixon@aol.com <RussWDixon@aol.com>

Thu, Dec 17, 2015 at 6:48 PM

To: lpielack@bhamgov.org

Hi Leslie!

As we discussed, what follows are my suggestions regarding the agenda sequence. Implement as you see fit, any remaining items can be reviewed by the Board. Please include my entire text in the electronic packet of materials for the Board as I want them to understand the method to the "madness". I suspect it could be listed under "Member Comments", "Russ' Agenda Reflections".

Dear Board Members:

Subsequent to Coco Siewert's Ethics Seminar presentation, and the adjustments we've made to the agenda sequence; I thought it may be timely to reorganize the agenda somewhat. Basically it's to create a structure that allows the quick business to be completed early in the meeting, leaving the remainder of the meeting for the open ended discussions that take up many meetings. I know the Board expects my suggestions to be abstract and idea based; but in this instance I will disappoint. These proposals are all "lifted" from other city agendas. While some of this will be infrequently used, when it's identified in the agenda, board members know when to bring items up. (And having spent years doing agendas and minutes for construction meetings, a concise agenda facilitates minute taking.)

Call To Order *(From the Parks & Recreation (P&R) and City Commission (CC) agendas. Helps clue the secretary to record the official start of the meeting.)*

Roll Call *(Nothing new.)*

Introduction of Guests *(Since this is rarely used, I'd eliminate it as a stand alone item. The P&R Board, which frequently has guests, doesn't even have this in their agenda.)*

Announcements & Introduction of Guests *(Pulled from the CC agenda. As an example, this is the opportunity for Gretchen to note her art exhibit, or Marty to note she has five more tickets to sell for the luncheon, or the Chairman to note a resignation. I think these are better made at the start of the meeting, with everyone's full attention, than at the end when everyone's putting on their coats. It's not meant to replace Board Member Comments, it's not meant to start a discussion. It's also an opportunity for the Director (if she thinks it's more timely) to note that the Museum will be closed Saturday because the city's shutting off the water to the building for repairs.)*

Review of the Agenda *(This comes from the PB, and Coco explained it in her presentation. This is the opportunity to add something that's been omitted, or to change the sequence because someone has to leave early.)*

Unfinished Business *(Nothing new.)*

New Business *(Nothing new.)*

Study Session Items *(From the PB. I just reviewed this with Coco. This is where we discuss the name change or other items that take months to finish. Puts it at the end (as we've been doing) so the imperative items are not shortchanged.)*

Communication and Reports *(About the same, but delete "Public Comments".)*

Meeting Open to the Public for Items not on the Agenda *(From the CC, the P&R Board, and all the other*

agendas I've reviewed, this is a stand alone item. If we want to engage the public, their comments should be encouraged by a line item of its own, and not a subparagraph or an afterthought.)

Next Regular Meeting (From P&R.)

Adjournment (Finally!)

Thanks for indulging me, Russ

DATE: January 7, 2016
TO: Museum Board
FROM: Leslie Pielack, Museum Director
SUBJECT: Director Report

Long Range Planning Session—The City Commission will be meeting on January 16 to hold a Long Range Planning Session. Each Department will present goals for 2016. A report to the was prepared which summarizes the Museum's progress on the current Strategic Plan and clarifies the expected focus for the coming year based on current status.

Park Wi-Fi Improvements, Invasive Removal and Landscape Design—WiFi access will be extended to the north end of the park near the pond when the construction season opens. In December, the lower brushy invasives were removed, opening up the area around the pond visually. Brushy invasives were also removed along the Rouge River boundary on the west side of the museum. The Rosso Family Foundation has provided additional grant funds for FY2016 to the Friends to develop drawings and planning for the pond area.

Archives room— The Archives Room has now been completed and staff are working to re-organize and move materials into the room.

Grant Application to Oakland County Historical Resources—the museum has been awarded a \$1000 grant to aid in its goal to digitize historic resources and make them available to the public. The grant was awarded in December for the grant period from January 1 to December 31 of 2016. The project will also help provide model digitization guidelines and hands-on training opportunities for other local history organizations in Oakland County.

Bell Project— The Rosso Family Foundation has granted the remaining funds (\$4,532) to the \$40,000 target. The architect for the project estimates that the cost may be as high as 20% greater than the original estimate, in large part because the project is small and those contractors who might be willing to take it on will charge a premium. She thought we may only get 1 or 2 qualified bidders. We will plan to go out for bids in February or March, 2016.

City Budget Process—The budget process is underway for 2016/2017. The requested museum budget is generally unchanged from previous years, with the exception of funds requested for additional personnel, and for re-branding/advertising/marketing.

Staffing Change—Program Assistant Dan Patton has reduced his hours, but will be continuing to work on special programs and social media. We are expecting to fill his remaining hours with another Museum Assistant later in January.



MEMORANDUM

Birmingham Historical Museum & Park

DATE: December 23, 2015

TO: Joe Valentine, City Manager

FROM: Leslie Pielack, Museum Director

SUBJECT: Museum Long Range Planning Report

Since 2013, the Museum has been implementing a three year (2013-2016) Strategic Plan that was developed to help re-position the Museum to enhance its service to the community and improve its long term sustainability. During this period, museums in general have been undergoing change, driven by dramatic advances in technology, economic pressure and new audiences with different expectations.

We are pleased that the Plan's implementation has led to successful outcomes in this regard. We have increased and broadened our audience, improved our collections storage and received historically valuable materials, such as our rare CREEM Magazine collection. We have strengthened our support and collaboration with other cultural institutions and with the Baldwin Public Library. We have successfully raised private donations and have been the recipient of grant funding to help preserve and integrate historical artifacts in the community, such as with the Hill School Bell Preservation Project.

During 2016, the Museum will be implementing the objectives of the final year of the current plan, with particular emphasis on the following key areas:

- Continuing an exploration of re-branding and effective marketing strategies
- Utilizing opportunities for making the park area more user-friendly
- Exploring the integration of technology for enhanced service and to provide educational content and interpretation, both in the park and in the buildings
- Consolidating and increasing efficiency with collections maintenance and storage
- Broadening use of site and online resources to reach a wider audience more efficiently
- Continuing meaningful integration of programming with schools and youth
- Exploring opportunities for innovative collaboration with other cultural institutions to bring engaging content to the public

This coming year, the Museum will also be reviewing and revising the existing Strategic Plan to prepare for 2017-2020. As the Plan develops for the next three year period, we will continue to keep you advised.

Respectfully submitted,

Leslie Pielack
Museum Director



City of Birmingham

Birmingham Historical Museum & Park

2013-2016 Strategic Plan

2013-2016 STRATEGIC PLAN

APPROVALS

Museum Board: February 9, 2013
City Commission: April 22, 2013

CONTRIBUTORS

Museum Director: Leslie Pielack
Museum Assistant: Connie Locker
Museum Board Members: Russell Dixon, Marty Logue, Gretchen Maricak, Andrew McMechan, George Stern, Jeff Wilmot
Museum Friends Board and President, Catherine Tuczek
Strategic Planning Consultant, Marilyn Opdyke, Opdyke Consulting Group

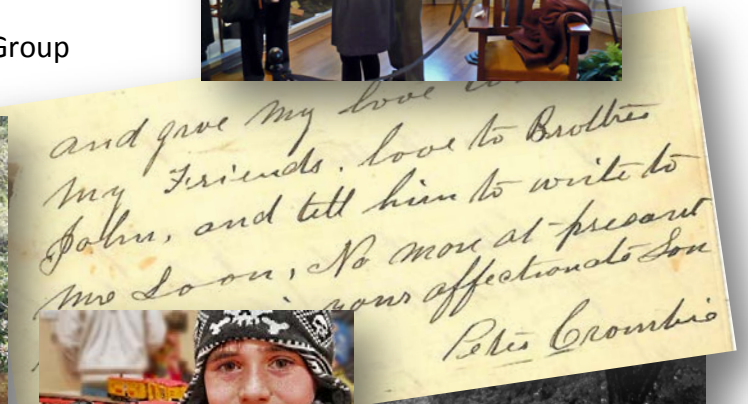


TABLE OF CONTENTS

EXECUTIVE SUMMARY	Background & Process; Mission & Value	4
	Goals & Definitions	5
GOALS OVERVIEW	Goal I (Community awareness, appeal, and engagement)	6
	Goal II (Museum Collections Stewardship)	9
	Goal III (Organization capacity, financial stability, and sustainability)	12
	Goal IV (Museum message and image)	14
STRATEGIC PLAN TRACKING	Detail of Objectives, Strategies, Measures, & Timelines	16
	Goal I Objectives A, B, C, & D	17
	Goal II Objectives A, B, C, D, & E	32
	Goal III Objectives A, B, C, & D	40
	Goal IV Objectives A, B, & C	48

EXECUTIVE SUMMARY

BACKGROUND AND PROCESS: In 2008, the Birmingham Historical Museum & Park adopted a strategic plan for the period of 2008-2013. It was created as a reflection of the prevailing favorable economic conditions, museum needs, and focus group input. However, during the past five year period, a challenging economy resulted in significant changes to the museum's funding and operations. In addition, an in-depth study was undertaken to assess the museum's collection stewardship (the American Alliance of Museums/Institute of Museum & Library Services Museum Assessment Program, or MAP) and to make recommendations for enhanced collections care. A complete report was provided to the museum in July of 2012.

Accordingly, a comprehensive review and revision of the expiring strategic plan was deemed necessary, and the target time period for the new plan was shortened from five to three years. The Museum Board engaged a consultant to help guide the museum through the process to assure the most efficient and complete bottom-up approach, and to integrate a wide variety of input in the new plan. These included an electronic survey, facilitated focus groups (local cultural organizations, commercial/retail business interests, and schools, families and churches), an open public meeting, and a two-part retreat of major stakeholders composed of city officials, the Museum Board, museum staff, Friends of the Birmingham Historical Museum & Park, and the Baldwin Public Library director.

The resulting 2013-2016 Birmingham Historical Museum & Park Strategic Plan represents this broad effort to respond to community expectations, professional museum standards, the current and anticipated economic climate, and the museum's organizational needs now and in the future.

MISSION AND VALUE: The Birmingham Historical Museum and Park is a unique cultural asset that connects us to our past and brings value to our present and future. Its mission is to foster a greater appreciation and understanding of the Birmingham area's unique heritage by collecting, preserving, cataloguing and exhibiting cultural material relevant to Birmingham's story, and by providing engaging and entertaining educational experiences that promote this story to visitors of all ages.

GOALS: The goals of the strategic plan as identified by planning participants fall into two groups, as follows:

Mission-Related Goals

- Enhance community access, appeal, and engagement, resulting in increased utilization of BHMP and broader appreciation for its cultural contribution to the region (Goal I, p. 6).
- Provide stewardship and management of the museum's collection of artifacts, archives, and buildings, in accordance with established professional museum practice (Goal II, p. 9).

Infrastructure/ Support Goals

- Assure financial stability and sustainability and increase the capacity of BHMP to serve its mission through enhanced fundraising, board development, leveraging relationships and volunteers (Goal III, p.12).
- Define a unified message and marketing plan by using a variety of marketing media to further develop the museum's brand and to increase awareness, interest, and attendance (Goal IV, p. 14).

The Museum Board has the role and responsibility of planning, implementing, and providing oversight of the Birmingham Historical Museum & Park's Strategic Plan.

DEFINITIONS: The following definitions apply to this outline.

Goals: *Goals in this plan state where the organization will focus its energies over a defined time frame. They can be short or long term in nature, depending on the decision of the group. Goals are not necessarily directly measurable but provide a broad view or concept of the priorities established by the organization.*

Objectives: *Objectives in this plan are shorter-term milestones that support the individual goals. Each goal should have at least two objectives that will tangibly move the organization toward reaching that goal. Objectives are concrete, measurable and focused on results.*

Strategies: *Strategies in this plan are specific actions or steps that lead to the accomplishment of the objectives. They are action-oriented, short-term, and include the specific "what, by when and by whom," components.*

Team Leaders: *Those individuals or small teams charged with a coordinating role, keeping the focus of a particular goal on track.*

Goal I: Enhance community access, appeal, and engagement, resulting in increased utilization of BHMP and broader appreciation for its cultural contribution to the region.

- More actively engage the community through programs, events, and other activities
- Create a sense of “place” through experiences, amenities and utilization of the grounds
- Enhance utilization of the buildings and the collection
- Enhance utilization of the park and outdoor space

Goal Team Leaders: Leslie Pielack, Museum Director; Catherine Tuczek, Museum Friends Board

OPPORTUNITIES

Currently,

- BHMP is viewed as a well kept secret
- The museum has limited appeal to our target audiences

We believe we can improve the appeal to current audiences, engage new audiences and increase visitation and participation in the experiences we offer.

THREATS

- Our current vague image in the community
- Limitations in funding, staffing and open hours
- The challenges presented by our location and signage limitations
- The perception that we are not exciting or visitor friendly

If we do not improve our engagement with the community, we run the risk of becoming irrelevant and losing the opportunity to enrich the quality of life in this region. **Our successful attainment of this goal will be evidenced by** an increase in awareness of the museum’s role; an increase in attendance at the museum buildings, park, events, and online; and increased collaboration with local cultural institutions and the business community.

Goal I (con't):

Objective A: Develop and implement strategies and programs that actively engage the community and make history and heritage more relevant in their lives

- A.1** Coordinate annual on site local-history based school tours to meet current school objectives through the Birmingham Public Schools Curriculum Coordinator
- A.2.** Meet quarterly with other cultural organizations to share ideas, develop a cultural calendar for Birmingham and to partner on events and programs
- A.3** Enhance our web presence and utilize technology to engage more actively with visitors
- A.4** Explore the possibility of taking interpretive exhibits to the schools/out to the public
- A.5** Develop an annual “signature event” that draws people to the museum
- A.6** Develop at least one partnership event with the Principal Shopping District each year
- A.7** Explore collaborative approaches with Baldwin Library to document and interpret its historic artifacts

Objective B: Establish the museum and park as a valued destination and place to encourage community connectivity

- B.1** Explore the feasibility of opening the buildings for public and private events or meetings on a restricted basis
- B.2** Make Wi-Fi available in the park and buildings

Objective C: Develop an interpretive plan for both buildings. Enhance utilization of the collection by engaging in dynamic and changing events, activities, programs and exhibits that keep an historical context but draw in more people and encourage returning visitation.

- C.1** Better define our core products at the buildings
- C.2** Clarify our key target audiences
- C.3** For each target audience brainstorm and develop at least one new event, exhibit or program (on site at the museum, or that can be taken to the audience at their location)
- C.4** Enhance exhibits through use of technology and hands-on/dynamic interactive opportunities
- C.5** Enhance signage and exterior appeal

Goal I (con't):

Objective D: Develop and implement an interpretive plan for the park. Better utilize the park to share local heritage, engage visitors, connect them to the museum site, and keep them coming back.

- D.1** Better define our “products” for the park, in conjunction with Parks Dept. staff
- D.2** Enhance the outdoor space and grounds; improve seating and add Wi-Fi
- D.3** Connect to the Rouge River Trail with a resting stop and interpretive information
- D.4** Provide information in the park that increases awareness of the museum buildings and site
- D.5** Explore the feasibility of utilizing the park as an event or music venue

Goal II: Provide stewardship and management of the museum's collection of artifacts, archives, and buildings, in accordance with established professional museum practice.

This goal is necessary to preserve the tangible objects in the museum collection for the future and make them more available through exhibits and other forms of access by the community. It will enable more comprehensive and engaging opportunities to connect to Birmingham with its history.

Goal Team Leaders: Leslie Pielack, Museum Director; Connie Locker, Museum Assistant; Catherine Tuczec, Museum Friends Board

OPPORTUNITIES

These issues were identified as top priorities in the Museum Assessment Program (MAP) report shared with the Museum Board in July, 2012.

Currently, the museum is challenged by the following:

- Inadequate staffing and supplies; lack of effective and appropriate storage for artifacts and archives (e.g., cataloguing an individual item takes 2.5 hours on average; storage is not archival grade or leaves materials vulnerable to risk)
- Incomplete or absent written policies and procedures and ineffective climate and environmental control for the collection
- Incomplete/inaccurate collection records, incomplete digitization, and ineffective organization of the collection that limit utilization and access by staff, researchers, and the general public
- The presence of inappropriate or unnecessary objects in the collection that do not support the mission require professional care but drain needed resources that are needed for the rest of the collection.

We believe that with increased resources, we can improve the overall care of our artifacts through improving our records, storage, and organization, while simultaneously digitizing the collection, making it easier to use and access. Proper safe storage and implementation of protective policies will help ensure the collection will be preserved for the future.

THREATS

- Limited funding for paid professional personnel and museum-grade equipment
- The needs of the collection are not well understood outside the museum staff

If we do not implement changes, the collection will continue to be at risk of environmental damage and irreversible deterioration, misplacement, inaccessibility, or will be rendered otherwise unusable, resulting in the irreplaceable loss of the museum's most valuable assets. **Our successful attainment of this goal will be evidenced by** the reduction of lost, damaged, misplaced, or inaccessible items; an increase in the number of collection items that are safely and properly stored; and improved documentation permitting wider physical and digital access.

Goal II (con't):

Objective A: Improve storage organization and environmental controls

- A.1** Create a storage organization plan based on assessment of the current collection's needs and the available space and storage furniture/supplies
- A.2** Assess environmental conditions and develop a plan to improve or correct deficits

Objective B: Improve efficiency, accuracy, and accessibility of object records and documentation

- B.1** Develop and implement a plan for correction, completion, and updating of existing object records and objects waiting for accession (the formal process to accept objects into a museum collection)
- B.2** Create digital and hard files of object records and develop/enhance finding aids
- B.3** De-accession inappropriate or unnecessary objects in accordance with museum standards and revised museum accession policy and procedures
- B.4** Create digital images of collection items for purposes of documentation and access

Objective C: Develop and implement collections-related policies and procedures for collections management, future acquisitions, de-accessioning, disaster preparedness, the museum's hands-on/use collection, building maintenance, and other collections-related policies and procedures in accordance with accepted museum standards

- C.1** Create appropriate written policies and procedures manuals
- C.2** Integrate policies and procedures with other relevant city departments
- C.3** Develop methods for orienting staff and volunteers to pertinent policies and procedures
- C.4** Review policies and procedures on an annual basis and revise as needed

Objective D: Provide increased digital access through exploring online or other virtual exhibit/access options

- D.1** Develop a virtual exhibit and digital access plan that reflects current museum practices and standards, and reflects the needs of the museum collection and its users and visitors
- D.2** Explore and implement web and other information technology options for improved access

Goal II (con't):

Objective E: Seek professional training opportunities for museum staff to provide ongoing collection management skills development and effectiveness

E.1 Identify training opportunities for paid and unpaid staff to enhance collections care

E.2 Provide opportunities for paid and unpaid staff to attend up to two professional programs per year

Goal III: Assure financial stability and sustainability and increase the capacity of BHMP to serve its mission through enhanced fundraising, board development, leveraging relationships and volunteers.

Goal Team Leaders: Leslie Pielack, Museum Executive Director; Connie Locker, Museum Assistant; George Stern, Museum Board Member; Catherine Tucek, Museum Friends Board Chair

OPPORTUNITIES

Currently,

- BHMP receives approximately 70% of its funding from the city and 30% from donations, grants and other revenue sources, largely made possibly by the work of the Friends of the Birmingham Historical Museum & Park
- City funding has decreased each year since 2009
- Staffing has been reduced from 1 full time Director and 2 part time professionals with paid summer professional interns to 1 part time Director and 1 part time professional

We believe we can increase our fundraising efforts and better leverage our board members, volunteers and partner organizations to increase our ability to serve our mission.

THREATS

- Lack of staff to effectively supervise/ manage volunteers
- Lack of stable/sustainable funding sources
- Continued limited city funding
- Volunteer attrition

If we do not take action on this goal, we severely limit our ability to effectively manage the collection and further engage the public in meaningful ways. It will also impact the number and frequency of exhibits and programs we can offer and limit our ability to implement this strategic plan. **Successful attainment of this goal will be evidenced by** a manageable budget combining both city and outside funding sources; an increase in donations and bequests to the Friends of the Birmingham Historical Museum & Park; an increase in donations to the museum's endowment; and an effective and sustainable board development and volunteer program.

Goal III (con't):

Objective A: As a collaborative effort of the Museum Board and Museum Friends develop a comprehensive fundraising plan for the BHMP (including a “case statement” clarifying the what and why of giving) that increases contributions to both operations and the endowment fund

- A.1** Develop and implement a strategy for increasing planned giving and bequests
- A.2** Develop and implement a strategy for attracting large/major donor contributions
- A.3** Host at least one major fundraising event per year
- A.4** Develop and implement strategies for increasing membership in the Friends to broaden the base from which to enhance annual giving

Objective B: Engage in Board Development by clarifying expectations and further developing the skills of the Museum Board and seeking new members with complementary skills

- B.1** Develop position descriptions and clarify expectations, responsibilities, and authorities
- B.2** Evaluate needed skills, identify opportunities, and develop a plan for identifying appropriate potential Museum Board candidates
- B.3** Create a board development plan including workshops, training programs, etc., for skills refinement including fund raising and effectively leveraging relationships
- B.4** Collaborate and delineate the respective roles of the Friends and the Museum Board

Objective C: Increase the personnel capacity of the organization by increasing professional staffing, leveraging volunteers, and utilizing partner organizations to help staff specific events, exhibits or programs

- C.1** Evaluate skills, expertise, and specific roles needed for effective and efficient operations
- C.2** Increase paid professional staff and hours as appropriate
- C.3** Develop a comprehensive volunteer program that incorporates job descriptions, organizational structure, recruiting and training plans and on-going management of volunteers

Objective D: Initiate a grant-writing effort in conjunction with the Friends to identify key opportunities for collaboration, and develop an account to provide potential matching funds for increased leverage

Goal IV: Define a unified message and marketing plan by using a variety of marketing media to further develop the museum's brand and to increase awareness, interest, and attendance.

Goal Team Leaders: Russ Dixon, Museum Board; Connie Locker, Museum Assistant

OPPORTUNITIES

Currently, BHMP faces several challenges that limit its ability to locate and connect with its audiences, such as:

- lacking a unified message and a recognizable brand
- being under-marketed
- having limited staff resources to build and maintain the museum's presence in the community
- having poor signage that contributes to confusion regarding the museum's location and hours of operation
- not having on-site parking

We believe we can improve the current environment by developing and clarifying our message and to increase awareness of the museum and its services to a wider audience.

THREATS

- lack of expertise and financial resources
- competition with other local organizations for patronage of events and programs
- lack of a local central advertising mechanism to get the word out to the community

If we do not take action on these issues, our exhibits, events, and programs will continue to be under attended, and the community will be unable to take full advantage of everything the museum has to offer to enhance quality of life. Important opportunities for community engagement will be missed. Without proactive change, the disconnection between the greater community and the Museum will increase over time, making improvement even more difficult in the future. **Successful attainment of this goal will be evidenced by** a clearly recognized brand for Birmingham Historical Museum & Park; improved image; increased media and communications coverage; increased attendance at the museum, online, at events, and in the park; and an increased understanding of Birmingham's history and heritage.

Goal IV (con't):

Objective A: Identify and utilize free and low-cost marketing resources maintained by specific target audiences, such as city publications, local schools, senior groups, and other community organizations.

Objective B: Identify our key audiences and explore and enhance the image the museum presents to the public through independent and collaborative projects and partnerships that strengthen our ties to the community

Objective C: Develop a Marketing Plan to clarify the museum's message and brand, utilizing survey data, innovative marketing strategies, low cost resources and micro-marketing concepts.

STRATEGIC PLAN TRACKING

This instrument is a tool to aid in the development and tracking of the strategies needed to assure effective and timely achievement of the strategic goals and objectives at the Birmingham Historical Museum and Park. It documents those goals and objectives and the specific strategies to be carried out to achieve each objective. In some cases the strategy may have additional activities or tasks identified and assigned. The combination of the strategies identified under each objective should create a comprehensive approach to achieving that objective.

The goals and objectives documented in this Strategic Plan were identified by key stakeholders and staff and are divided into Mission-Related Goals – those that directly support the mission - and Infrastructure or Support Goals – those that are necessary to assure the viability of the organization and the support of the program goals and activities.

The tracking tool can be used to guide activities as well as to evaluate the effectiveness of the Strategic Plan. Strategic planning is meant to be fluid and dynamic, and ongoing review of the Strategic Plan helps ensure that it accurately reflects the changing needs of the organization.

Goal I: Enhance community access, appeal, and engagement, resulting in increased utilization of BHMP and broader appreciation for its cultural contribution to the region.

Objective A: Develop and implement strategies and programs that actively engage the community and make history and heritage more relevant in their lives

A.1 Coordinate annual on site local-history based school tours with current school objectives with Birmingham Public Schools.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
A.1.a Coordinate curriculum goals to meet planned exhibit(s) and collection, in cooperation with Birmingham Public Schools Curriculum Coordinator.	Museum Staff	Annually in March for May-June tours	Provide content consistent with 50% or more of required local history/social studies components	Personnel; standard curriculum requirements	BPS Curriculum Coordinator	Complete
A.1.b Develop annual tour schedule, policies and procedures and coordinate with Birmingham Public Schools Curriculum Coordinator.	Museum Staff	Annually in March for May-June tours	Scheduling complete and approved by BPS	Personnel	BPS Curriculum Coordinator/ school personnel	Complete
A.1.c Develop staffing pattern, provide training/orientation and acquire needed supplies/objects/displays.	Museum Staff	Annually, prior to May	Completion	Personnel; funds for supplies	n/a	Ongoing

Goal I: Enhance community access, appeal, and engagement, resulting in increased utilization of BHMP and broader appreciation for its cultural contribution to the region.

Objective A: Develop and implement strategies and programs that actively engage the community and make history and heritage more relevant in their lives.

A.2 Meet quarterly with other cultural organizations to share ideas, partner on events and programs, and explore development of a cultural calendar for the Birmingham community.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
A.2.a Identify potential partners in local cultural organizations/service clubs; contact and explore meeting opportunities.	Museum Staff	12 mos.	Completion	Personnel; meeting space	Other local cultural organizations	Ongoing
A.2.b Identify potential events, focusing on mission and/or museum collection, for partnership (see also Goal III, Objective.D.3).	Museum Staff	Year 2; 2014/15, ongoing	Hold 1 event per year with another local cultural organization.	Personnel	Other local cultural organizations	Ongoing
A.2.c Explore contributing to and/or participating in a cultural calendar for the Birmingham community.	Museum Staff	Year 2; 2014/15, ongoing		Personnel	Other local cultural organizations	Ongoing

Goal I: Enhance community access, appeal, and engagement, resulting in increased utilization of BHMP and broader appreciation for its cultural contribution to the region.

Objective A: Develop and implement strategies and programs that actively engage the community and make history and heritage more relevant in their lives.

A.3 Enhance our web presence and utilize technology to engage more actively with visitors.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
A.3.a Analyze/assess web needs and explore options in conjunction with Strategic Plan objectives and current museum web products and applications.	Museum Staff	Year 2; 2014/15	Data collected and analyzed	Personnel	City IT Dept Staff	Ongoing
A.3.b Explore technology opportunities for visitor appeal and develop plan.	Museum Staff	Year 2; 2014/15	Plan complete and approved by Museum Board	Personnel; possible museum web/technology consultant	City IT Dept Staff	Ongoing
A.3.c Implement plan and collect data for evaluation of effectiveness.	Museum Staff	Year 2; 2014/15; ongoing	Completion; maintain data collection for evaluation	Personnel; possible museum web/technology consultant	City IT Dept Staff	Ongoing

Goal I: Enhance community access, appeal, and engagement, resulting in increased utilization of BHMP and broader appreciation for its cultural contribution to the region.

Objective A: Develop and implement strategies and programs that actively engage the community and make history and heritage more relevant in their lives.

A.4 Explore the possibility of taking interpretive exhibits to the schools/out to the public.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
A.4.a Explore and assess applicable school curriculum and identify educational objectives for elementary and secondary students in conjunction with Birmingham Public Schools Curriculum Coordinator; develop plan for portable exhibits in accordance with museum standards and collection.	Museum Staff	Year 3; 2015/16	Completion and Museum Board approval	Personnel; TBD	TBD	75% Complete
A.4.b Explore and assess feasibility of off-site, temporary/portable exhibits for the general public; develop plan in accordance with museum standards and collection.	Museum Staff	Year 3; 2015/16	Completion and Museum Board approval	Personnel; TBD	TBD	50% Complete

Goal I: Enhance community access, appeal, and engagement, resulting in increased utilization of BHMP and broader appreciation for its cultural contribution to the region.

Objective A: Develop and implement strategies and programs that actively engage the community and make history and heritage more relevant in their lives.

A.5 Develop an annual “signature event” that draws people to the museum.

A.6 Develop at least one partnership event with the Principal Shopping District each year.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
A.5.a Explore feasibility for an annual on site “signature event” that enhances museum’s role and appeal.	Museum Staff	12 mos.;	Completion	Personnel, comparative data/information on other local events	Museum Board, Friends	Ongoing
A.6.a Meet with Principal Shopping District staff to explore collaborative event options that enhance museum’s role and appeal.	Museum Staff	12 mos.; ongoing	Completion	Personnel	TBD	Ongoing
A.5.b/A.6.b Develop event plan, including staffing & promotion components.	Museum Staff	Year 2; 2014/15	Completion; Museum Board approval	Personnel	TBD	Ongoing
A.5.c/A.6.c Hold event and collect data on effectiveness for future planning.	Museum Staff	Year 3; 2015/16	Survey data and event review.	Personnel	TBD	Ongoing

Goal I: Enhance community access, appeal, and engagement, resulting in increased utilization of BHMP and broader appreciation for its cultural contribution to the region.

Objective A: Develop and implement strategies and programs that actively engage the community and make history and heritage more relevant in their lives.

A.7 Explore collaborative approaches with Baldwin Library to document and interpret its historic artifacts.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
A.7.a Meet with library staff to determine needs and develop appropriate approach.	Museum Staff	Year 2; 2014/15	Completion	Personnel	Library staff	Ongoing
A.7.b Devise plan for inventory and documentation and information sharing.	Museum Staff	Year 2; 2014/15	Completion and appropriate approvals within each organization	TBD	Library staff	Deferred
A.7.c Develop interpretive plan in collaboration with library staff and needs.	Museum Staff	Year 2; 2014/15	Completion and appropriate approvals within each organization	TBD	Library staff	Deferred
A.7.d Explore funding possibilities for plan (see Goal III.D.3).	Museum Staff	Year 3; 2015/16	Completion and appropriate approvals within each organization	TBD	Library staff	Deferred

Goal I: Enhance community access, appeal, and engagement, resulting in increased utilization of BHMP and broader appreciation for its cultural contribution to the region.

Objective B: Establish the museum and park as a valued destination and place to encourage community connectivity

B.1 Explore the feasibility of opening the buildings for public and private events or meetings on a restricted basis.

B.2 Make Wi-Fi available in the park and buildings.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
B.1.a Create/review/explore procedures and policies for Park & Allen/Hunter Houses for public/private use for meetings and events; develop plan (see I.D.2.e).	Museum Staff	12 mos.	Completion and Museum Board approval	Personnel	Park staff	Complete
B.2.a Expand/develop capacity for Wi-Fi access in buildings and park in conjunction with City IT Dept.	Museum Staff/City IT staff	12 mos./ TBD	Completion	Personnel; funding resources to expand capacity, supplies, equipment	IT/City staff	75% Complete
B.1.b Provide information/promote new services to public.	Museum Staff/City	TBD	Hold minimum 1 private & 2 public events/meetings per year	Personnel; funding for banquet supplies, furnishings, & advertising	City staff , local media	Complete
B. 2.c Provide for public lobby access & seating at Allen House.	Museum Staff	TBD	Completion	Personnel; funding for furnishings	n/a	Deferred

Goal I: Enhance community access, appeal, and engagement, resulting in increased utilization of BHMP and broader appreciation for its cultural contribution to the region.

Objective C: Develop an interpretive plan for both buildings. Enhance utilization of the collection by engaging in dynamic and changing events, activities, programs and exhibits that keep an historical context but draw in more people and encourage return visitation.

C.1 Better define our core products at the buildings and develop an interpretive plan.

C.2 Clarify our key target audiences.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
C.1.a /C.2 Develop survey for ongoing collection of data on multiple dimensions-audience, programs, and events.	Museum Staff	6-12 mos.; ongoing	Completion; collection and analysis of data	Personnel	n/a	50% Complete
C.1.b Assess/research historical assets-collection, buildings & site; identify interpretive priorities in conjunction with Strategic Plan & museum standards.	Museum Staff	6-12 mos.	Completion	Personnel; museum standards and best practices	n/a	Ongoing
C.1.c Develop interpretive plan for permanent exhibits, buildings, and exhibit schedule with priority emphasis.	Museum Staff	12 mos.; ongoing	Completion and Museum Board approval	Personnel; museum standards and best practices	n/a	Ongoing
C.1.d/ Develop promotion plan in conjunction with general marketing plan (IV.C).	TBD	Year 2, 2014/15	Completion and Museum Board approval	Personnel; funding for possible consultant	TBD	Deferred

Goal I: Enhance community access, appeal, and engagement, resulting in increased utilization of BHMP and broader appreciation for its cultural contribution to the region.

Objective C: Develop an interpretive plan for both buildings. Enhance utilization of the collection by engaging in dynamic and changing events, activities, programs and exhibits that keep an historical context but draw in more people and encourage return visitation.

C.3 For each target audience brainstorm and develop at least one new event, exhibit or program (on-site at the museum, or that can be taken to the audience at their location).

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
C.3.a Identify primary audiences and explore options and best means for focused approach to exhibits, events or programming, with a prioritized use of collection objects (see also C.1.a/C.2).	Museum Staff	Year 2; 2014/15	Completion	Personnel; Survey data; MAP Report; museum standards and best practices	TBD	Ongoing
C.3.b Hold meetings with representatives of primary audiences to explore/develop program or event.	Museum Staff	Year 2; 2014/15	Completion; develop at least one special program for each primary audience.	TBD	TBD	Ongoing
C.3.c Hold event and gather data for review and future development/revision.	Museum Staff	Year 2; 2014/15; ongoing	Hold at least one special program for each primary audience per year.	TBD	TBD	Ongoing

Goal I: Enhance community access, appeal, and engagement, resulting in increased utilization of BHMP and broader appreciation for its cultural contribution to the region.

Objective C: Develop an interpretive plan for both buildings. Enhance utilization of the collection by engaging in dynamic and changing events, activities, programs and exhibits that keep an historical context but draw in more people and encourage return visitation.

C.4 Enhance exhibits through use of technology and hands-on/dynamic interactive opportunities.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
C.4.a Explore hands-on & technology-based interactive applications and introduce into changing and permanent exhibits (See I.A.3).	Museum Staff	Year 2, 2014/15; ongoing	Include interactive components in changing and permanent exhibits as feasible	Personnel; museum standards and best practices	n/a	Ongoing
C.4.b Collect data to use in evaluation and review of interactive strategies.	Museum Staff	Year 2, 2014/15; ongoing	Completion; collect and analyze data	Personnel; TBD	n/a	Ongoing

Goal I: Enhance community access, appeal, and engagement, resulting in increased utilization of BHMP and broader appreciation for its cultural contribution to the region.

Objective C: Develop an interpretive plan for both buildings. Enhance utilization of the collection by engaging in dynamic and changing events, activities, programs and exhibits that keep an historical context but draw in more people and encourage return visitation.

C.5 Enhance signage and exterior appeal.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
C.5.a Explore various means of using signage and improving exterior appeal, including comparative data from local sites and other resources, site conditions and local ordinances.	Museum Staff/ Museum Board/ Special Committee	12 mos.	Gather data and analyze	Personnel; museum best standards and practices; applicable city ordinance/s	City staff	Ongoing
C.5.b Develop and implement plan in conjunction with marketing plan (see Goal IV.A.B.C.).	Museum Staff/ Museum Board/ Special Committee	Year 2, 2014/15	Completion and plan approved by Museum Board	Personnel; funds for possible consultant; funds for signage, equipment, etc.	n/a	Deferred
C.5.c Evaluate effectiveness and modify as appropriate.	Museum Staff/ Museum Board/ Special Committee	Year 2, 2014/15; ongoing	Completion; review data on ongoing basis	Personnel	n/a	Deferred

Goal I: Enhance community access, appeal, and engagement, resulting in increased utilization of BHMP and broader appreciation for its cultural contribution to the region.

Objective D: Develop and implement an interpretive plan for the park. Better utilize the park to share local heritage, engage visitors, connect them to the museum site, and encourage return visitation.

D.1 Better define our “products” for the park, in conjunction with Parks Dept. staff.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
D.1.a Develop survey for ongoing collection of data on image, use, and primary audience for park.	Museum Staff	6-12 mos.; ongoing	Completion; collection and analysis of data	Personnel	n/a	Ongoing
D.1.b Assess/research park assets (including historic information) & identify interpretive priorities in accordance with museum standards (See I.C.1.b).	Museum Staff	Year 2, 2014/15	Completion	Personnel; museum standards and best practices	n/a	50% Complete
D.1.c. Develop interpretive plan for park with Parks staff, as appropriate.	Museum Staff	Year 2, 2014/15	Completion and Museum Board approval	Personnel; museum standards and best practices	n/a	Deferred
D.1.d/ Develop promotion plan in conjunction with general marketing plan (IV.C).	TBD	Year 2, 2014/15	Completion and Museum Board approval	Personnel; funding for possible consultant	TBD	Deferred

Goal I: Enhance community access, appeal, and engagement, resulting in increased utilization of BHMP and broader appreciation for its cultural contribution to the region.

Objective D: Develop and implement an interpretive plan for the park. Better utilize the park to share local heritage, engage visitors, connect them to the museum site, and encourage return visitation.

D.2 Enhance the outdoor space and grounds; improve seating and add Wi-Fi.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
D.2.a Improve outdoor appeal by adding shaded seating on plaza and Wi-Fi (see I.B.2).	Museum Staff	1-3 mos.	Completion	Personnel; funding for furnishings	n/a	Complete
D.2.b Develop maintenance program with Parks staff, including control of invasives.	Museum Staff	6-12 mos.	Completion	Personnel	n/a	Complete
D.2.c Complete construction of ADA ramp and back porch improvements.	Museum Staff/City Staff	3-6 mos.	Completion	Personnel	n/a	Complete
D.2.d Complete design phase for Hill School Bell outdoor protective structure in plaza, including bid process.	Museum Staff/City Staff	3-6 mos.	Architectural drawings complete	Completed concept plan (Russ Dixon).	n/a	Complete
D.2.e Develop fund raising plan to complete construction of Hill School Bell structure (see III.A.1.c).	Museum Board/ Friends/Special Committee	Year 2, 2014/15	Completion and Museum Board approval	Personnel; TBD	TBD	Complete

Goal I: Enhance community access, appeal, and engagement, resulting in increased utilization of BHMP and broader appreciation for its cultural contribution to the region.

Objective D: Develop and implement an interpretive plan for the park. Better utilize the park to share local heritage, engage visitors, connect them to the museum site, and encourage return visitation.

D.3 Connect to the Rouge River Trail with a resting stop and interpretive information.

D.4 Provide information in the park that increases awareness of the museum buildings and site.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
D.3.a/D.4.a Develop plan for enhancing park connection to Rouge trail in accordance with park interpretive plan and Parks staff, as appropriate (See D.1.c).	Museum Staff/Parks Staff	Year 3, 2015/16	Completion and Museum Board approval	Personnel; Rouge trail plan	n/a	50% Complete
D.3.b/D.4.b. Explore, develop & implement plan for providing low-impact access to trail interpretive information, including use of technology, in keeping with museum standards and best practices.	Museum Staff	Year 3, 2015/16	Completion and Museum Board approval	Personnel ; TBD	n/a	50% Complete
D.3.c Create visitor seating area and integrate into general park maintenance plan.	Museum Staff/Parks Staff	Year 3, 2015/16	Completion	Personnel; TBD	n/a	50% Complete

Goal I: Enhance community access, appeal, and engagement, resulting in increased utilization of BHMP and broader appreciation for its cultural contribution to the region.

Objective D: Develop and implement an interpretive plan for the park. Better utilize the park to share local heritage, engage visitors, connect them to the museum site, and encourage return visitation.

D.5 Explore the feasibility of utilizing the park as an event or music venue.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
D.5.a Explore feasibility for use of park/site as a music venue, including research, collecting survey data, and identification of possible collaborative opportunities.	Museum Staff/ Museum Board	Year 2, 2014/15	Completion	Personnel; TBD	Parks Staff, TBD	Deferred
D.5.b Develop plan in accordance with other relevant components of Strategic Plan, and in accordance with museum standards as applicable, including policies and procedures. Ensure park assets are protected.	Museum Staff/ Museum Board	Year 2, 2014/15	Completion and approval by Museum Board	Personnel; TBD	TBD	Deferred

Goal II: Provide stewardship and management of the museum's collection of artifacts, archives, and buildings, in accordance with established professional museum practice.

Objective A: Improve storage organization and environmental controls.

A.1 Create a storage organization plan based on assessment of the current collection's needs and the available space and storage furniture/supplies.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
A.1.a Assess current storage space and needs at Allen and Hunter Houses.	Museum Staff	3-6 mos.	Data on space, needs, and current conditions collected & recorded for analysis	Personnel, measuring tools, camera	Volunteer staff	75% Complete
A.1.b Create a plan for artifact, archives, prop, and supplies storage.	Museum Staff	3-6 mos.	Plan completed and approved by Museum Board	Personnel, data from A.1.a; MAP Report; museum standards & benchmarks	n/a	75% Complete
A.1.c Re-locate/re-arrange storage units, objects, and files based on plan and update all affected Past Perfect (cataloguing software) documents accordingly, including creating finding aids.	Museum Staff	12 mos.	Physical re-location complete; documents updated; finding aids created	Personnel-including museum staff, volunteers, Dept Public Service assistance, equipment/tools	Integrate activity with DPS/Facilities personnel.	50% Complete

Goal II: Provide stewardship and management of the museum's collection of artifacts, archives, and buildings, in accordance with established professional museum practice.

Objective A: Improve storage organization and environmental controls.

A.2 Assess environmental conditions and develop a plan to improve or correct deficits.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
A.2.a Assess current environmental conditions at the Allen and Hunter Houses.	Museum Staff	6-9 mos.	Data collected and recorded for analysis.	Personnel; MAP Report, standards & benchmarks; pest control data; Funding for tools (hygro-meter, light meter, thermometer); pH tester, camera	n/a	Ongoing
A.2.b Create a plan for reducing environmental risk and ameliorating existing conditions.	Museum Staff	9-12 mos.	Plan completed and approved by Museum Board	Personnel, data from A.2.a; MAP Report; museum standards & benchmarks	Consult with Facilities Dept personnel	Deferred
A.2.c Purchase supplies and introduce systems for maintaining adjusted/corrected environmental conditions.	Museum Staff	9-12 mos.	Implementation of plan-systems in place and supplies in use	Personnel; funding for supplies	Consult with Facilities Dept personnel	Deferred

Goal II: Provide stewardship and management of the museum's collection of artifacts, archives, and buildings, in accordance with established professional museum practice.

Objective B: Improve efficiency, accuracy, and accessibility of object records and documentation.

B.1 Develop and implement a plan for correction, completion, and updating of existing object records and objects waiting for accession (the formal process to accept objects into a museum collection).

B.2 Create digital and hard files of object records and develop/enhance finding aids.

B.4 Create digital images of collection items for purposes of documentation and access.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
B.1.a Develop plan in conjunction with relevant policies and procedures (see C.1).	Museum Staff	1-3 mos.	Plan complete and approved by Museum Board	Personnel; MAP Report, museum standards & benchmarks, Past Perfect 5.0 Software Manual	n/a	Complete
B.1.b Implement plan- physical management and research (verification, object marking, assessment, & photography).	Museum Staff	1.5 - 2.0 hrs/object; ongoing	100% of collection is complete and accurate on audit	Personnel (additional funding), some trained volunteers; camera, tools, archival supplies	n/a	Ongoing
B.2.a Implement plan- data management & digitization (data entry, digitization of records, legal verification, hard files, & finding aids.)	Museum Staff	.5 - 1.0 hrs/object; ongoing	100% of collection is complete and accurate on audit	Personnel (additional funding); Past Perfect 5.0 Software, archival printing and filing supplies	n/a	Ongoing
B. 4.a Create documentary images, upload, and backup file for off-site storage.	Museum Staff	.5 hrs/object; ongoing	100% of collection is complete and accurate on audit	Personnel, camera, Image & Past Perfect 5.0 software; digital storage media, backup harddrive	IT Dept	Ongoing

Goal II: Provide stewardship and management of the museum's collection of artifacts, archives, and buildings, in accordance with established professional museum practice.

Objective B: Improve efficiency, accuracy, and accessibility of object records and documentation

B.3 De-accession inappropriate or unnecessary objects in accordance with museum standards and revised museum accession policy and procedures

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
B.3.a Create location for temporary storage of potential de-accessions.	Museum Staff	1-3 mos.; ongoing	Location identified and prepared	Personnel; secure temporary location	n/a	Deferred
B.3.b Develop priority list of objects for de-accession consideration in conjunction with approved policies and procedures (See C.1).	Museum Staff	3-6 mos.; ongoing	Presentation of list to Museum Board for approval	Personnel; MAP Report, museum standards; completion and Museum Board approval of appropriate policies and procedures	n/a	Deferred
B.3.c Resolve/address any donor or legal issues.	Museum Staff	3-6 mos.; ongoing	Completion of task	Personnel; MAP report, museum standards.	n/a	25% Complete
B.3.d Complete de-accession process for priority list and create records according to approved policies and procedures (See C.1).	Museum Staff	Within 3 mos. of Museum Board approval	Process completed and records created	Archival office supplies, file storage, printing supplies.	n/a	Deferred

Goal II: Provide stewardship and management of the museum's collection of artifacts, archives, and buildings, in accordance with established professional museum practice.

Objective C: Develop and implement collections-related policies and procedures for collections management, future acquisitions, de-accessioning, disaster preparedness, the museum's hands-on/use collection, building maintenance, and other collections-related policies and procedures in accordance with accepted museum standards.

C.1 Create appropriate written policies and procedures manuals.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
C.1.a Develop collections-related policy and procedures that address collections management, future acquisitions, de-accessions, and hands on/use collection.	Museum Staff	6-12 mos.	Plan complete and approved by Museum Board	Personnel; MAP Report; museum standards and benchmarks	n/a	75% Complete
C.1.b Develop Disaster Preparedness Plan.	Museum Staff	6-12 mos.	Plan complete and approved by Museum Board	Personnel; MAP Report; museum standards and benchmarks; D-Plan	n/a	75% Complete
C.1.c Develop Historic Building Maintenance Plan.	Museum Staff	6-12 mos.	Plan complete and approved by Museum Board	Personnel; historic structures guidelines and standards; National Park Service/Secretary of Interior Standards, State Historic Preservation Office guidelines, Historic Structure Report, other relevant documents	Personnel from Facilities Dept & Planning Dept	25% Complete

Goal II: Provide stewardship and management of the museum's collection of artifacts, archives, and buildings, in accordance with established professional museum practice.

Objective C: Develop and implement collections-related policies and procedures for collections management, future acquisitions, de-accessioning, disaster preparedness, the museum's hands-on/use collection, building maintenance, and other collections-related policies and procedures in accordance with accepted museum standards.

C.2 Integrate policies and procedures with other relevant city departments.

C.3 Develop methods for orienting staff and volunteers to pertinent policies and procedures.

C.4 Review policies and procedures on an annual basis and revise as needed.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
C.2 Meet with appropriate city personnel to share Disaster Preparedness Plan.	Museum Staff	1-3 mos. after plan approval	Completion	Personnel	City admin, Police, Fire & Facilities Depts	Deferred
C.3 Hold orientation meetings with boards and staff.	Museum Staff	1-3 mos. after plan approval	Completion	Personnel; meeting space; meeting supplies	Museum & Friends Boards, Volunteers	Deferred
C.4 Review policies and procedures on annual basis and revise as needed.	Museum Staff/Museum Board	Annually	Annual review and approval by Museum Board	Personnel	n/a	Deferred

Goal II: Provide stewardship and management of the museum's collection of artifacts, archives, and buildings, in accordance with established professional museum practice.

Objective D: Provide increased digital access through exploring online or other virtual exhibit/access options.

D.1 Develop a virtual exhibit and digital access plan that reflects current museum practices and standards, and reflects the needs of the museum collection and its users and visitors.

D.2 Explore and implement web and other information technology options for improved access.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
D.1.a /D.2.a Explore & evaluate current museum standards & methods for digital collections.	Museum Staff	Year 2- (2014-15)	TBD	Personnel; data/information from other museums	Other museum professionals	Complete
D.1.b/D.2.b Collect survey data.	Museum Staff	12 mos. after D.1a & D.2.a	TBD	Funding for professional consultant	TBD	Ongoing
D.1.c /D.2.c Develop plan.	Museum Staff	6-12 mos. after survey	TBD	TBD	TBD	75% Complete
D.1.d/D.2.d. Implement plan.	Museum Staff	Year 3- (2015-16)	TBD	TBD	TBD	Deferred

Goal II: Provide stewardship and management of the museum's collection of artifacts, archives, and buildings, in accordance with established professional museum practice.

Objective E: Seek professional training opportunities for museum staff to provide ongoing collection management skills development and effectiveness.

E.1 Identify training opportunities for paid and unpaid staff to enhance collections care.

E.2 Provide opportunities for paid and unpaid staff to attend up to two professional programs per year.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
E.1.a /E.2.a Explore/review available opportunities in collections care training.	Museum Staff	ongoing	Create list of appropriate opportunities	Personnel	n/a	Ongoing
E.1.b/E.2.b Identify and communicate recommended training opportunities.	Museum Staff	ongoing	Regularly communicate through email and announcements	Personnel, email, Friends newsletter notices	n/a	Ongoing
E.1.c/E.2.c Facilitate participation by paid and unpaid staff.	Museum Staff	ongoing	Minimum of 1 training experience/yr for paid museum staff and 1 training experience/yr for unpaid museum staff	Funding assistance, meeting space as needed, car pooling, etc.	n/a	Ongoing

Goal III: *Assure financial stability and sustainability and increase the capacity of BHMP to serve its mission through enhanced fundraising, board development, leveraging relationships and volunteers.*

Objective A: As a collaborative effort of the Museum Board and Museum Friends, develop a comprehensive fundraising plan for the BHMP (including a “case statement” clarifying the what and why of giving) that increases contributions to both operations and the endowment fund.

A.1 Develop and implement a strategy for increasing planned giving and bequests.

A.2 Develop and implement a strategy for attracting large/major donor contributions.

A.4 Develop and implement strategies for increasing membership in the Friends to broaden the base from which to enhance annual giving.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
A.1.a/A.2.a Develop case statement that clarifies message and establishes prioritized target funding in the areas of annual operating funds, exhibits, special projects, capital improvements, and increasing the endowment.	Museum Staff; Museum & Friends Boards	3-6 mos.	Case Statement developed and approved by Museum Board and Friends Board	Personnel; joint meeting with account representative from Community Foundation of Southeast Michigan (Endowment); funding for development consultant-TBD	n/a	Complete
A.1.b/A.2.b Identify prospective funding resources based upon case statement and funding priorities, including major donors, corporate sponsors, and other funding partners. <i>(con't on next page)</i>	Museum & Friends Boards	6-12 mos.	Completion	Personnel; funding for development consultant-TBD	n/a	50% Complete

Goal III: *Assure financial stability and sustainability and increase the capacity of BHMP to serve its mission through enhanced fundraising, board development, leveraging relationships and volunteers.*

Objective A: As a collaborative effort of the Museum Board and Museum Friends, develop a comprehensive fundraising plan for the BHMP (including a “case statement” clarifying the what and why of giving) that increases contributions to both operations and the endowment fund.

A.1 (con’t) Develop and implement a strategy for increasing planned giving and bequests.

A.2 (con’t) Develop and implement a strategy for attracting large/major donor contributions.

A.4 (con’t) Develop and implement strategies for increasing membership in the Friends to broaden the base from which to enhance annual giving.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
A.1.c/A.2.c Develop comprehensive multi-year, multi-component plan for fundraising campaign.	Museum & Friends Boards	Year 2: 2014/15	Plan completed & approved by both boards.	Personnel; funding for development consultant-TBD	n/a	25% Complete
A.4.a Assist Friends in developing strategies for increasing membership in the organization, including identifying new members, developing incentives, and promotion.	Museum & Friends Boards	6-12 mos.; ongoing	Membership increases by at least 20%	Personnel; funding for development consultant-TBD	n/a	75% Complete
A.4.b Assist Friends in developing planned/annual giving program to build endowment.	Museum & Friends Boards	6-12 mos.; ongoing	Meet or exceed annual endowment funding target	Personnel; joint meeting with account representative from Community Foundation of Southeast Michigan (Endowment)	n/a	75% Complete

Goal III: *Assure financial stability and sustainability and increase the capacity of BHMP to serve its mission through enhanced fundraising, board development, leveraging relationships and volunteers.*

Objective A: As a collaborative effort of the Museum Board and Museum Friends develop a comprehensive fundraising plan for the BHMP (including a “case statement” clarifying the “what and why” of giving) that increases contributions to both operations and the endowment fund.

A.3 Host at least one major fundraising event per year.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
A.3.a Develop joint plan for major fund-raising event to be held each year with specific funding goals, in accordance with fund raising plan.	Museum & Friends Boards/ Special Committee	6-12 mos.	Completion of plan and approval by both boards, as appropriate	Personnel; data on past fund raising events	Outside parties on planning committee	75% Complete
A.3.b Develop event plan, including all aspects of event, event promotion and possible co-sponsors.	Museum & Friends Boards/ Special Committee	Year 2: 2014/15; annually there-after	Completion of plan and approval by both boards, as appropriate	Personnel; funding for advertisement/promotion; event sponsors	Outside parties on planning committee	75% Complete
A.3.c Hold event annually and use outcome measures to plan next year’s event.	Museum & Friends Boards/ Special Committee	Year 2: 2014/15; annually there-after	Identify/develop method for collecting participant data and success measures, including percentage of target funds raised and media exposure	Personnel; survey method	Outside parties on planning committee	75% Complete

Goal III: *Assure financial stability and sustainability and increase the capacity of BHMP to serve its mission through enhanced fundraising, board development, leveraging relationships and volunteers.*

Objective B: Engage in Board Development by clarifying expectations and further developing the skills of the Museum Board and seeking new members with complementary skills.

B.1 Develop position descriptions and clarify expectations, responsibilities, and authorities.

B.2 Evaluate needed skills, identify opportunities, and develop a plan for identifying appropriate potential Museum Board candidates.

B.3 Create a board development plan including workshops, training programs, etc., for skills refinement including fund raising and effectively leveraging relationships.

B.4 Collaborate and delineate the respective roles of the Friends and the Museum Board.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
B.1/B.4 Develop position descriptions and delineate the respective roles of the Museum and Friends Boards.	Museum & Friends Boards/ Special Committee	3 mos.	Position descriptions complete role delineation approved by each board for its respective components	Personnel; MAP/Museum standards & ethics; non-profit board standards; city ordinance & other applicable documents	n/a	Complete
B.2.a/B.3.a Evaluate needed skills and develop a plan for board development and training in collaboration with Friends Board.	Museum & Friends Boards/ Special Committee	6 mos.	Position descriptions complete role delineation approved by each board for its respective components	Personnel; funds for board development consultant; MAP/Museum standards & ethics, non-profit standards	n/a	Complete
B.2.b/B.3.b Identify potential future board candidates for both boards.	Museum & Friends Boards/ Special Committee	6 mos.	Completion	Personnel	n/a	75% Complete

Goal III: *Assure financial stability and sustainability and increase the capacity of BHMP to serve its mission through enhanced fundraising, board development, leveraging relationships and volunteers.*

Objective C: Increase the personnel capacity of the organization by increasing professional staffing, leveraging volunteers, and utilizing partner organizations to help staff specific events, exhibits or programs.

C.1 Evaluate skills, expertise, and specific roles needed for effective and efficient operations.

C.2 Increase paid professional staff as appropriate.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
C.1.a Assess and identify personnel/staffing roles and functions for all aspects of museum operation, including collections, programming, and administration/operations, in accordance with strategic plan objectives.	Museum Staff	3-6 mos.	Completion	Personnel	n/a	Complete
C.1.b/C.2 Gather comparative data on similar institutions to determine context for efficiency and place the museum in proper context.	Museum Staff	3-6 mos.	Data reviewed and analyzed	Personnel; national museum survey data & reports; data from local museums	Area museums	Complete
C.1.c/C.2 Develop staffing plan and associated budget proposal in conjunction with City Manager and Human Resources Director.	Museum Staff	3-6 mos.; reviewed annually	Plan complete and approved by Museum Board; proposal submitted and approved.	Personnel; funding	City administration/Human Resources	75% Complete

Goal III: *Assure financial stability and sustainability and increase the capacity of BHMP to serve its mission through enhanced fundraising, board development, leveraging relationships and volunteers.*

Objective C: Increase the personnel capacity of the organization by increasing professional staffing, leveraging volunteers, and utilizing partner organizations to help staff specific events, exhibits or programs.

C.3 Develop a comprehensive volunteer program that incorporates job descriptions, organizational structure, recruiting and training plans and ongoing management of volunteers.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
C.3.a Based on III.C.1, develop a volunteer/unpaid staff program with organizational structure/oversight, staffing categories/levels, and position descriptions to support paid staff, museum operations, special projects, and events.	Museum Staff	6-12 mos.	Completion and approval by Museum Board	Personnel; MAP Report, museum standards and ethics; Bureau of Labor guidelines	n/a	Complete
C.3.b Develop written policies and procedures for unpaid staff in collaboration with City Human Resources Director.	Museum Staff	6-12 mos.	Completion	Personnel; MAP Report, museum standards and ethics; Bureau of Labor guidelines	n/a	75% Complete
C.3.c Develop and implement a recruiting plan, including partner organizations and academic institutions, as appropriate. (con't on next page)	Museum Staff/ Museum & Friends Boards	Year 2: 2014/15; ongoing	Staffing levels at 80% or above; continued participation in Volunteer Network of Southeast Michigan.	Personnel; Data from local volunteer resources; funding for volunteer staff coordinator	Partner/ academic organizations -TBD	Ongoing

Goal III: *Assure financial stability and sustainability and increase the capacity of BHMP to serve its mission through enhanced fundraising, board development, leveraging relationships and volunteers.*

Objective C: Increase the personnel capacity of the organization by increasing professional staffing, leveraging volunteers, and utilizing partner organizations to help staff specific events, exhibits or programs.

C.3 (con't) Develop a comprehensive volunteer program that incorporates job descriptions, organizational structure, recruiting and training plans and on-going management of volunteers.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
C.3.d Develop volunteer training and orientation program for identified roles and functions, including incentives for retention.	Museum Staff/ Museum & Friends Boards	Year 2: 2014/15; ongoing	Collect data on effectiveness of training, satisfaction, and retention	Personnel; funding for volunteer staff coordinator	TBD	Ongoing

Goal III: *Assure financial stability and sustainability and increase the capacity of BHMP to serve its mission through enhanced fundraising, board development, leveraging relationships and volunteers.*

Objective D: Initiate a grant-writing effort in conjunction with the Friends to identify key opportunities for collaboration, and develop an account to provide potential matching funds for increased leverage.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED-	STATUS/ CHALLENGES
D.1 Complete Cultural Data Project application.	Museum Staff	6-12 mos.	CDP Completion	Personnel	n/a	Deferred
D.2 Identify appropriate grant-eligible projects and costs based on planned exhibits, special projects, events, and collections needs.	Museum Staff	12 mos.	Create list of potential grants	Personnel; matched funding; 501c3 status of Friends for application	Friends	Ongoing
D.3 Identify and evaluate collaborative partners, grant resources, timetable & administration for specified projects; develop narrative.	Museum Staff	Year 2: 2014/15	Identify 1-2 possible projects and partners; Museum Board approval	Personnel; matched funding; 501c3 status of Friends for application	Friends	Ongoing
D.4 Coordinate with specified partner, write and submit grant application.	Museum Staff	Year 2: 2014/15	Completion and application submission	Personnel; matched funding; 501c3 status of Friends for application	Friends; partner org TBD	Ongoing
D.5 If awarded, complete project and accountability reporting.	Museum Staff	Year 2-3: 2014/15	Project completion and fulfillment of grant requirements	Personnel	TBD	Ongoing

Goal IV: Define a unified message and marketing plan by using a variety of marketing media to further develop the museum's brand and to increase awareness, interest, and attendance.

Objective A: Identify and utilize free and low-cost marketing resources maintained by specific target audiences, such as city publications, local schools, senior groups, and other community organizations.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED- INDIVIDUAL OR GROUP	STATUS/ CHALLENGES
A.1. Identify comprehensive list of potential resources	Museum Board Special Committee	1-3 mos.	Completion	Personnel	Volunteers, Friends, Staff	75% Complete
A.2 Make contact with each organization, get copies of their publications, & develop list of publication dates	Museum Board Special Committee	1-3 mos.	Completion	Personnel	Staff	75% Complete
A.3 Develop plan for advertising	Museum Board Special Committee	3-6 mos.	Plan completed and approved by Museum Board	Possible consultant (see IV.B.2.b/B.3.b)	Staff	50% Complete
A.4 Utilize list of resources to advertise events, exhibits, & happenings at Museum	Museum Staff/ Museum Board Special Committee	Ongoing (once list complete)	At least 5 new free marketing resources utilized; survey data analysis	Personnel; survey data (see IV. B.1)	Friends	50% Complete

Goal IV: Define a unified message and marketing plan by using a variety of marketing media to further develop the museum's brand and to increase awareness, interest, and attendance.

Objective B: Identify our key audiences and explore and enhance the image the museum presents to the public through independent and collaborative projects and partnerships that strengthen our ties to the community

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED- INDIVIDUAL OR GROUP	STATUS/ CHALLENGES
B.1. Develop survey	Museum Board Special Committee	Year 2, 2014/15	Survey completed & distributed online, on-site, off-site	Personnel; Funding for possible consultant	TBD	Ongoing
B.2 Utilize survey results to identify primary audiences	Museum Staff/ Museum Board	Year 2, 2014/15	Completion & Museum Board approval	Personnel; survey results	N/A	Ongoing
B.3 Explore partnerships with organizations involved with primary audiences	Museum Staff/ Museum Board	Year 2, 2014/15; ongoing	Exploration and/or development of at least 2 partnerships	Personnel	TBD	Ongoing
B.4 Develop and implement independent & collaborative projects reflecting primary audiences	Museum Staff/ Museum Board	Year 2, 2014/15; ongoing	At least 1 independent & 2 collaborative projects developed & implemented	Personnel;	TBD	Ongoing

Goal IV: Define a unified message and marketing plan by using a variety of marketing media to further develop the museum's brand and to increase awareness, interest, and attendance.

Objective C: Develop a Marketing Plan to clarify the museum's message and brand, utilizing survey data, innovative marketing strategies, low cost resources and micro-marketing concepts.

STRATEGIES	RESPONSIBILITY	TIMING TO COMPLETE	HOW DO WE MEASURE SUCCESS?	RESOURCES NEEDED	OTHERS INVOLVED- INDIVIDUAL OR GROUP	STATUS/ CHALLENGES
C.1 Explore and assess museum brand & marketing needs and identify qualified consultants to provide proposals in accordance with City requirements	Museum Board/ Museum Staff/Special Committee	Year 2, 2014/15	Completion and Museum Board approval	Personnel; funding for consultant; survey data/analysis	City staff	50% Complete
C.2 Work with consultant to develop comprehensive marketing plan that reflects findings and Strategic Plan	Museum Board/Special Committee	Year 3, 2015/16	Plan completed and approved by Museum Board	Personnel; funding for consultant; survey data/analysis	TBD	Deferred
C.3 Implement marketing plan and assess effectiveness	Museum Board/Special Committee	Year 3, 2015/16; Ongoing	TBD by marketing plan	Personnel; funding (TBD); survey data/analysis	TBD	Deferred