

Historical Museum at Fort Missoula

Operating Plan

Fiscal Year 2011 July 1, 2010 – June 30, 2011

INSTITUTIONAL OVERVIEW

Mission:

The mission of the Historical Museum at Fort Missoula is to keep Missoula County's history alive for the education and enjoyment of the public.

Vision:

The vision of the Historical Museum at Fort Missoula is to inspire a sense of place and history for Missoula County by collecting, studying, interpreting, and preserving the region's natural and cultural heritage. This includes the Museum's core areas of collecting: the history of the city and county of Missoula, the history of Fort Missoula and the military presence in the area, and the history of forest management and the wood products industry in western Montana. The Museum's focus further includes, but is not limited to: family history, women's history, Native American history, environmental history, and minority-based history.

Our vision for the Museum is for a place and institution that:

- 1. Is a welcoming place where people are drawn together to share their passion and interest in our history and sense of place*
- 2. Supports and gives voice to the region's diverse cultural perspectives*
- 3. Has sustainable, modern facilities while retaining its traditional character*
- 4. Creates and maintains educational programs and exhibits that are professionally presented, inspiring and intellectually challenging*
- 5. Has collections that are conserved per American Association of Museum accreditation standards, and will provide a continuing source of inspiration and learning*
- 6. Has a paid staff and volunteer corps that are creative, enthusiastic, and supportive of each other, the Museum's mission, and the community.*
- 7. Participates in discussions at the national level on matters pertaining to the Museum's mission, and for the good of the profession.*
- 8. Believes in and participates in open strategic partnerships.*

Core Values:

The Historical Museum at Fort Missoula is committed to

- Openness – of purpose, governance, and communication*
- Integrity – in fair and ethical practices, and the respectful treatment of all*
- Excellence – in leadership, cooperation, and in use of the highest museum standards as established by the American Association of Museums*
- Relevance – in identifying and responding to new challenges*
- Stability – of its mission, vision, and resources, particularly its collections*
- Respect – for different viewpoints, diverse cultural values, and the traditions of the Museum*
- Balance – in dealing with all aspects of museum operations fairly and honestly*

Implementation Strategy:

Insofar as its resources permit, the Museum collects, preserves and interprets objects and informational materials related to the exploration, founding and evolution of the community and county of Missoula, the development of Fort Missoula and the myriad aspects of the military presence in the area, and of the history of forest management and the wood products industry. The Museum collects, preserves and interprets objects from the period of the earliest exploration to the present in order to present a coherent and total picture. These objects and informational materials are made available for study and the enjoyment of all, in a pleasant, secure, safe and accessible setting. While, the Museum does not collect Native American objects the Museum will enter into cooperative partnerships to help save and interpret local Native American history.

PROGRAMS

The Historical Museum at Fort Missoula is committed to offering professional, accessible, quality programs in the areas of:

- Collections care, conservation, and preservation;
- Education, with opportunities for everyone, onsite and offsite;
- Exhibits, with both long-term and temporary; and exhibits on the grounds and in the main Museum building;
- Web based offerings;
- Recreation, through the maintenance and up-keep of the Museum ground.

NOTE: For more detailed information on these, see the relevant policy documents governing each.

PRIOR YEAR'S OPERATING PLANS AND EXPERIENCES

During Fiscal Years 2008-2010, the Historical Museum was operating under the annual operating plans based on the 2008 Strategic Plan prepared by WestRidge Creative. In the autumn and winter of 2009-2010 the staff and Administrative Committee worked on a Strategic Plan for Fiscal Years 2011-2013, which was adopted by the Board of Trustees on March 15, 2010. The 2011-2013 Strategic Plan seeks to build on the successes of the previous plan 2006 update of the 2004 Strategic Plan. As such the Museum decided to focus on certain strategies for growth planning and certain strategic directions:

STRATEGIES FOR GROWTH PLANNING
Abstracted from the previous Strategic Plan

- Strengthen what the Museum already has, while taking advantage of new opportunities
- Learn what the community wants from the Museum
- Build community ownership
- Meet today's technology demands
- Build on the organization's uniqueness
- Build a culture of fund-raising
- Become an organization that achieves planned, realistic scale

STRATEGIC DIRECTIONS

For the purpose implementing this Strategic Plan two “Strategic Directions” have been identified:

- Growth in Core Programs and Facilities
 - To build on our track record of innovative, engaging, community educational programs;
 - To expand the culture of education throughout the organizational;
 - To maintain and restore the existing facilities on the main campus;
 - To restore and renovate building T-1;
 - To continue to install an aggressive schedule of exhibits;
 - To continue to acquire and access important collections; and
 - To renovate, modify, and improve collection storage facilities.
- Achieve Organization Scale by:
 - Building a culture of fund raising that supports sustainable growth;
 - Actively recruiting individuals with fund-raising experience to all boards;
 - Finding ways to pay off the mortgage on T-1;
 - Adding staff as possible and continue to offer staff professional development opportunities;
 - Enhancing diversity in all areas of Museum operations; and
 - Building an evaluation process that focuses on goals, ensuring that the Museum meets community needs and builds community ownership in the Museum.

FINANCIAL RESOURCES

The financial resources of the Historical Museum are solid, with the Museums 2-mill levy guaranteed “in perpetuity” according to the successful 2002 Mill Levy Ballot Initiative. Recognizing that the Fiscal Year 2011 Budget is not approved by the Missoula Board of County Commissioners until August, and that given the current economic condition, the FY 2011 Budget will be reduced, the operating plans that follow are based on conservative projection.

However, for FY 2010, that the budget was \$517,162. This amount breaks down as follows:

- \$298,461 Personnel
- \$159,823 Operations
- \$ 10,000 Preserving Missoula County's History Grants
- \$ 20,000 Capital
- \$ 28,878 Transfer to Capital Improvement/T-1 Mortgage

The Friends of the Historical Museum are also in a very healthy condition. Their FY 2010 budget called for income of \$201,400, and expenses of \$201,400, for a balanced budget. They entered the fiscal year with cash-on-hand of \$37,488.43. Their FY 2011 budget will not be approved until August 2010.

FY 2011 OPERATING PLAN

Taken from the Strategic Plan the following goals are summarized and broken down into responsibilities, financial implications, actions, and timelines.

Programming: To build on the track record of innovative, engaging, community educational programming and expand the culture of education throughout the organization:

- Develop a plan to add interpretive signs on the grounds.
 - Responsibility: Staff.
 - Financial Implication: Staff and volunteer time.
 - Goals: Develop a plan, a list of possible providers with cost estimates..
 - Timeline: Develop plan and list by September 2010.
- Complete the physical restoration of the Homestead Cabin and develop an interpretive program.
 - Responsibility: Education staff and Education Committee.
 - Financial Implication: \$5,000.
 - Goals: Prepare the Homestead for opening.
 - Timeline: Completion by spring 2011.
- Research an exhibit for the NCO Quarters.
 - Responsibility: Senior staff and volunteers.
 - Financial Implication: Staff and volunteer time.
 - Goals: Have an exhibit script and list of desired artifacts/photos for one room; obtain funding.
 - Timeline: Spring 2011.
- Begin Research on the 2012 exhibit.
 - Responsibility: Senior staff and volunteers.
 - Financial Implication: Staff and volunteer time.
 - Goals: Decide on a topic and contract with someone to do the exhibit research.
 - Timeline: By September 2010.
- Capitalize on the FY 10 ADC program with the art museum and library, to develop specific educational programming for the Alien Detention period.
 - Responsibility: Education Department.
 - Financial Implication: \$500 in county funds.
 - Goals: Develop and implement.
 - Timeline: By September 2010.
- Work with the University of Montana to produce a conference on the ADC period of American History
 - Responsibility: Development Director.
 - Financial Implication: Staff time.
 - Goals: Work with UM and the Montana Historical Society to have a conference in Missoula; pursue grants.
 - Timeline: October 2011.
- Identify and implement an educational component for every project, exhibit, and program.

- Responsibility: Education staff and committee.
- Financial Implication: Dependent upon program budget.
- Goals: Increase educational offerings.
- Timeline: Continuing.
- Continue to expand docent program and recruit additional volunteers.
 - Responsibility: Education staff and committee.
 - Financial Implication: Staff time.
 - Goals: Have more docents available to do programs.
 - Timeline: Continuing.
- Pursue and develop partnerships to expand opportunities and increase involvement of the community in all programming.
 - Responsibility: All.
 - Financial Implication: To reduce financial burdens of Museum.
 - Goals: Spread the responsibility and work.
 - Timeline: Continuing.
- Revamp the permanent exhibit.
 - Responsibility: Senior staff.
 - Financial Implication: \$1,000/year.
 - Goals: Continually refresh the exhibit with new objects; i.e., more photos of the 25th Infantry, more photos of the ADC period, a new section on the Japanese experience at the ADC, use some of the artifacts donated by Macy's.
 - Timeline: Continuing.
- Maintain the temporary exhibit schedule.
 - Responsibility: Senior staff.
 - Financial Implication: \$5,000/year.
 - Goals: Open at least one temporary exhibit a year (not including orientation room exhibits), obtain sponsorships.
 - Timeline: Continuing.

Facilities – Current Buildings: To maintain and restore existing facilities.

- Roof and paint Schoolhouse.
 - Responsibility: Staff, Building and Grounds Committee, volunteers.
 - Financial Implication: \$15,000.
 - Goals: Raise money from the 2011 Annual Meeting and pursue grants to lessen impact on Museum's budget.
 - Timeline: Summer 2010.
- Stabilize the NCO Building.
 - Responsibility: NCO Building Committee, volunteers.
 - Financial Implication: \$1,000 plus any grants obtained.
 - Goals: Prepare the NCO Quarters for the installation of exhibits.
 - Timeline: Fall 2011.
- Lay rail sections for the Library Car and Trolley Barn.
 - Responsibility: Building and Grounds Committee, volunteers.
 - Financial Implication: Volunteer time, \$1,000/each.
 - Goals: Install rail sections that each can then be permanently mounted on.

- Timeline: Winter 2010.
- Restore Library Car and Trolley trucks.
 - Responsibility: Building and Grounds Committee, volunteers.
 - Financial Implication: \$5,000/each.
 - Goals: Have the trucks ready to mount the Car and Trolley.
 - Timeline: Winter 2010.
- Complete the exterior of the Trolley Barn and return the Trolley Car.
 - Responsibility: Staff, Building and Grounds Committee, contractors.
 - Financial Implication: \$1,000.
 - Goals: Have the Barn's exterior finished by UM Homecoming.
 - Timeline: UM Homecoming to use Trolley Car in the parade.
- Continue restoration of and install Plexiblass door Homestead Cabin.
 - Responsibility: Education Staff, Education Committee.
 - Financial Implication: \$10,000 with grants and/or sponsorships.
 - Goals: Have the Homestead Cabin ready to be open to the public as an educational center.
 - Timeline: Spring 2011.
- Renovate the Timber Building and develop a new exhibit to accommodate the Roney Collection.
 - Responsibility: Staff and volunteers.
 - Financial Implication: \$500.
 - Goals: Make the Roney Collection available to the public and refresh the "Timber" exhibit.
 - Timeline: Summer 2010.
- Monitor Missoula Parks and Recreation plans for the Fort Missoula Regional Park.
 - Responsibility: Senior Staff.
 - Financial Implication: Staff time.
 - Goals: Monitor the situation and prepare responses as necessary.
 - Timeline: Continuing.
- Add shelving to the collections storage areas in Building #322.
 - Responsibility: Collections Department.
 - Financial Implication: As money is available.
 - Goals: Increase and improve storage areas.
 - Timeline: Continuing.
- Install new fencing around Old Officer's Row.
 - Responsibility: Building and Grounds Committee, volunteers.
 - Financial Implication: \$500/year.
 - Goals: Use Eagle Scouts Projects.
 - Timeline: Continuing.
- Continue routine repairs.
 - Responsibility: Building and Grounds Committee and volunteers
 - Financial Implication: \$5,000/year.
 - Goals: Implement priorities as established, as we have money.
 - Timeline: Continuing.

Facilities – T-1:

- Raise the money necessary to pay the yearly mortgage.
 - Responsibility: Executive Director, Development Director, Friends Board, Finance Committee.
 - Financial Implication: time, pay off the annual payment.
 - Goals: Try to turn the InterCap Loan into a real mortgage and thus lower the annual payment, raise the required money so that the debt doesn't affect operations. Try to get grants or Congressional funds to remove the burden entirely.
 - Timeline: Immediately.
- Raise match for grants.
 - Responsibility: Friends Board, Finance Committee.
 - Financial Implication: Raise the required funds from new sources.
 - Goals: Not to take money from operations budgets.
 - Timeline: Immediately.
- Start moving Collections Department and appropriate collections materials.
 - Responsibility: Collections Department and Collections Committee.
 - Financial Implication: \$2,000.
 - Goals: Begin the move of the Collections Department to the new facility.
 - Timeline: Summer 2010.
- Complete the move of Friends supplies and administration files.
 - Responsibility: Executive Director, Friends Board, volunteers.
 - Financial Implication: time.
 - Goals: Utilize the new space in T-1 to free up space in Building #322.
 - Timeline: Fall 2010.
- Find a tenant.
 - Responsibility: All.
 - Financial Implication: To be determined.
 - Goals: Create an income stream to reduce stress on budget.
 - Timeline: Continuing.
- Finalize space for programming.
 - Responsibility: Executive Director, Education Staff.
 - Financial Implication: time.
 - Goals: Have a practical plan ready for implementation, with estimated costs.
 - Timeline: Summer 2010.
- Complete the National Park Service and TIIP grant projects.
 - Responsibility: Executive Director, Development Director, contractors.
 - Financial Implication: \$50,000 in match needed to be raised.
 - Goals: Complete the projects as per grant requirements.
 - Timeline: According to grant deadlines.
- Obtain National Landmark status.
 - Responsibility: Missoula Historica Preservation Office.
 - Financial Implication: None.
 - Goals: Assist MHPO in getting the status approved.
 - Timeline: MHPO schedule.
- Develop partnerships to maximize the use of the facility.

- Responsibility: All.
- Financial Implication: time.
- Goals: To reduce the financial impact on the Museum and to develop community buy-in.
- Timeline: Continuing.
- Complete handicapped ramp and ADA restroom.
 - Responsibility: Contactor
 - Financial Implication: \$20,000.
 - Goals: To have the ramp and restroom ready for the Northern Rockies Heritage Center as per Letter of Agreement. Find grants or sponsorships to reduce impact on budget. Monitor county contractor.
 - Timeline: Summer 2010.
- Complete renovations for the new Collection areas.
 - Responsibility: Collections Staff and Collections Committee.
 - Financial Implication: Staff and volunteer time, as money is available..
 - Goals: Turn the space into useable collections storage.
 - Timeline: Continuing.

Collections: To plan, develop, install, and maintain temporary, bi-annual, and permanent exhibits; plan, develop, install, maintain, and renovate exhibits in the outer buildings, continue the acquisition and accession of appropriate collections materials; evaluate the necessity of deaccessioning; and to renovate, modify, and improve collections storage.

- Initiate Process of transferring collections from Photo-Document Room and Library/Research materials to Building T-1.
 - Responsibility: Collections staff, Collections Committee, and volunteers.
 - Financial Implication: Time.
 - Goals: Remove the most sensitive and crowded collections and move them to prime collections storage in Building T-1.
 - Timeline: Start summer 2010.
- Initiate process of Museum-wide collections inventory and PastPerfect update.
 - Responsibility: Collections staff and volunteers.
 - Financial Implication: Time, and some supplies.
 - Goals: To meet AAM standards of collections management.
 - Timeline: Start summer 2010.
- Acquire and access Blackfoot Stagecoach.
 - Responsibility: Executive Director, Curator of Collections.
 - Financial Implication: Donation in the short-term, display and care to follow.
 - Goals: We have been storing Battery A's restored stagecoach for years and it needs to be in the collection.
 - Timeline: Dependent upon Battery A.
- Complete fabrication of crates and develop traveling exhibit schedule for WW II poster and Ogden Collections.
 - Responsibility: Collections staff, contractor.
 - Financial Implication: \$1000.
 - Goals: Be able to market and display these collections nationally.

- Timeline: Fall 2010.
- Complete the cataloging of the library materials and install new library database system.
 - Responsibility: Collections staff, volunteers.
 - Financial Implication: To be determined.
 - Goals: Update our current system to make it more user-friendly.
 - Timeline: Fall 2010.
- Bring new Museum website online, and upload collections/research material.
 - Responsibility: Staff.
 - Financial Implication: Time, \$200/month web maintenance fee.
 - Goals: Update the current site and make collections accessible to a wider audience.
 - Timeline: Summer 2010.
- Initiate process of renovating all open shelving in collections storage areas.
 - Responsibility: Collections staff, volunteers.
 - Financial Implication: \$1,000/year.
 - Goals: Improve current storage.
 - Timeline: Start summer 2010.
- Complete annual partial collections inventory.
 - Responsibility: Collections staff, volunteers.
 - Financial Implication: Time.
 - Goals: Continue to abide by current museum standards.
 - Timeline: Continuing.
- Contact descendants of historic Missoula families to inquire as to potential collections acquisitions.
 - Responsibility: Collections staff.
 - Financial Implication: Time.
 - Goals: Improve our collection of Missoula-related objects.
 - Timeline: Continuing.
- Continue processing and eventual accessioning of UM archaeological collections.
 - Responsibility: Collections staff.
 - Financial Implication: Time.
 - Goals: Continue cooperation with UM.
 - Timeline: Continuing.
- Complete the development of a research file database.
 - Responsibility: Collections staff.
 - Financial Implication: unknown.
 - Goals: Improve the public's ability to access and use our research files.
 - Timeline: Continuing.
- Evaluate and transfer all remaining collections materials in Storage Warehouse Yard indoors.
 - Responsibility: Collections staff, Collections Committee, volunteers.
 - Financial Implication: Time.
 - Goals: To get all of our collections undercover.
 - Timeline: Continuing.

Fund-raising: To build a culture of fund-raising, raise funds to support the sustainable growth of the Museum, and raise money to pay off the debt on Building T-1.

- Raise money for the T-1 mortgage.
 - Responsibility: Friends Board, Finance Committee, Development Director.
 - Financial Implication: Time.
 - Goals: To lessen the mortgage's impact on the operations budgets.
 - Timeline: Immediately and continuing.
- Recruit three new people: Friends, Board members, or volunteers – with fund-raising experience to the organization.
 - Responsibility: Friends board, Finance committee.
 - Financial Implication: Time.
 - Goals: Bring new ideas and fund-raising experience to the organization.
 - Timeline: Names to Nominating Committee by February of each year for April elections.
- Continue to offer Trustees and Friends fund-raising training opportunities.
 - Responsibility: Development Director and Finance Committee.
 - Financial Implication: Staff and volunteer time, \$500 for trainer.
 - Goals: Conduct some workshop to offer or somebody to bring in.
 - Timeline: Schedule workshop for winter 2010-2011.
- Identify additional sources of revenue.
 - Responsibility: All, Development Director and Finance Committee.
 - Financial Implication: Time and \$100 for supplies.
 - Goals: Lessen the burden of increasing expenses by finding additional funds.
 - Timeline: Continuing.

Staffing: Add staff as possible and continue professional development.

- Assess and identify staffing needs and obtain Board approval..
 - Responsibility: Executive Director, Administration Committee.
 - Financial Implication: Time.
 - Goals: Determine what new positions are needed and determine if it can be afforded, perhaps through grants..
 - Timeline: Continuing.
- Identify funding sources, including grants, ongoing revenue, and special projects to finance needed positions.
 - Responsibility: Executive Director, Director of Development, and Finance Committee.
 - Financial Implication: Staff and volunteer time.
 - Goals: Find money for needs county and Friends can't fill.
 - Timeline: Continuing.
- Leverage staff needs with partnerships.
 - Responsibility: Staff.
 - Financial Implication: Staff time, \$100 for supplies.
 - Goals: Provide for much needed staff without impacting the current budget..
 - Timeline: Continuing.
- Support staff professional development with conferences and workshops.
 - Responsibility: Executive Director and Administration Committee.

- Financial Implication: \$10,000/year.
- Goals: To allow staff to grow professionally and be active in the greater museum community as students, mentors, and teachers.
- Timeline: Continuing.

Diversity: Enhance diversity in programming, collections, exhibits, boards, and staff to accurately reflect Missoula County history, engage broader community support, and attract new funding.

- Monitor if the Museum operations accurately reflect the diversity of Missoula County.
 - Responsibility: Senior staff, Administration Committee.
 - Financial Implication: Time.
 - Goals: Ascertain if the Museum reflects the local diversity.
 - Timeline: Continuing.
- Explore opportunities to diversify the Museum offerings through partnerships.
 - Responsibility: Senior staff, Administration Committee.
 - Financial Implication: Time.
 - Goals: By identifying and partnering with other organizations the Museum will attain greater diversity otherwise not possible.
 - Timeline: Continuing.
- Implement at least 2 programs/projects that fill diversity gaps each year.
 - Responsibility: Senior staff.
 - Financial Implication: \$2,000/year.
 - Goals: Improve the Museum's diversity.
 - Timeline: Continuing.
- Recruit at least 2 Board members that fill skill/diversity gaps on the Board each year.
 - Responsibility: Administration Committee, Nominating Committee, Friends Board, Trustee Board.
 - Financial Implication: Time.
 - Goals: Increase diversity on the Boards and obtain needed skills.
 - Timeline: Continuing.

Evaluation: Build an evaluation process that focuses on goals, ensuring that the organization meets community needs and builds community ownership in of the Museum.

- Create and implement an annual operating plan that is regularly reviewed by staff and Board.
 - Responsibility: Executive Director, Administration Committee, and Trustees.
 - Financial Implication: Staff and volunteer time, \$100 for supplies.
 - Goals: Staff to prepare FY 2012 Operating Plan.
 - Timeline: Draft done by March/April for discussion/approval at the April/May 2011 Trustee meeting.
- Formally review progress on the Strategic Plan and suggest improvements.
 - Responsibility: All.
 - Financial Implication: Time.

- Goals: Keep the Museum to its stated goals.
- Timeline: Continuing.
- Evaluate all programs and exhibits to measure/evaluate interests and involvement of program attendees and other outreach targets.
 - Responsibility: Staff..
 - Financial Implication: Time, \$100 for supplies..
 - Goals: Make sure that we evaluate everything we do (we don't have to evaluate each school group or every single visitor to every single program, but we need a sampling from everything) so that we always strive for improvement..
 - Timeline: Continuing.

Approved by the Board of Trustees: