

Historical Museum at Fort Missoula

Strategic Plan

Fiscal Years 2014-2016

(July 1, 2013 – June 30, 2016) • FINAL PLAN---June 28, 2013

INTRODUCTION

In March through June of 2013, the Staff, Trustees, and Friends of the Historical Museum at Fort Missoula (HM@FM), as well as some County stakeholders, participated in a strategic planning process facilitated by WestRidge Creative. The result is the Strategic Plan for Fiscal Years 2014-2016. The Strategic Plan, which includes each top-ranked priority, is contained within this report.

This Strategic Plan will inform and guide the work, development, and growth of the Historical Museum at Fort Missoula over the next three years.

OVERALL THEMES FROM SURVEYS AND INTERVIEWS

The Museum is in a maintenance phase. Planning for the Executive Director transition, sustaining current programs, and continuing to curate excellent exhibits are the primary themes in this three-year plan. The Museum must balance opportunities with resources, and plan for moderate growth appropriately.

Themes and projects include:

- *Executive Director Search & Replacement*
- *Maintain/Upgrade/Remodel current grounds and facilities*
- *T-1: Continued restoration and full utilization of building*
- *Strengthen the Culture of Fundraising and Museum opportunities for Partnerships*
- *Increase Visibility in Community—Increase Visitations—Increase Memberships*

MISSION STATEMENT

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 STATEMENT

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.

The Historical Museum at Fort Missoula is a place and institution that:

1. Welcomes people 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 exhibited, stored, and preserved (via professionally accepted preventative conservation methods) as per American Association of Museums (AAM) accreditation standards, and which will provide a continuing source of inspiration and learning;
6. Has a paid staff and volunteer corps who 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. Supports and participates in 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 utilization of the highest museum standards as established by the AAM;
- 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.

STRATEGIES FOR GROWTH PLANNING

Abstracted from the previous Strategic Plan

1. Capitalize on new opportunities, while building on the strengths of the Museum
2. Learn how the Museum can better serve our community;
3. Build community ownership;
4. Meet today's technology demands;
5. Build on the organization's uniqueness;
6. Foster a culture of fundraising;
7. Become an organization that achieves planned, realistic scale.

STRATEGIC PLAN

Strategic Direction I: Executive Director (ED) Search and Replacement

I. ED Search

- Re-engage Administration Committee (ADMIN Committee) to conduct process;
- Review current job description and make appropriate changes in developing new job description;
- Prepare scope of search and begin process following transition plan appropriately.

Executive Director Replacement: Search and Transition		
Time	Action Items	Responsibility
Year 1 July 1, 2013 - June 30, 2014	<ul style="list-style-type: none"> • Re-engage Administration Committee and recruit members from both Trustees and Friends Boards • Review current ED job description and those of other current staff—articulate new job description for new ED search • Identify current ED’s expected compensation package and work with ED & County staff to manage and compensate the amount owed. • Review new job description and expected pay-out of compensation package with County staff appropriately • Determine current ED’s last day on job and build transition and ED search calendar • Check in no later than the end of the year (Dec. 2013) to make necessary adjustments to transition/search plan • Begin Search for new ED and follow transition plan (<i>National search begins in JAN 2014</i>) 	<ul style="list-style-type: none"> • <Current> ED (Bob) • ED/Staff/ADMIN Committee • ED/ADMIN Committee & County staff • ED/ADMIN Committee/staff & County staff • ED/ADMIN Committee • ED/Museum staff/ADMIN Committee & County staff • ED/Museum staff/ADMIN Committee & County staff

<p>Year 1 <i>(Continued)</i></p> <p>July 1, 2013 – June 30, 2014</p>	<ul style="list-style-type: none"> • Continue Search for new ED and follow transition plan • When search is complete and new ED begins, re-visit transition plan with new ED and staff • Throw a BIG Party for outgoing ED, Dr. Robert M. Brown! <i>(Last day: April 12, 2014)</i> 	<ul style="list-style-type: none"> • ED/Museum staff/ADMIN Committee • New ED/Museum staff • New ED/Museum staff/Trustees/Friends Board/County staff/general public
<p>Year 2</p> <p>July 1, 2014 - June 30, 2015</p>	<ul style="list-style-type: none"> • Continue transition plan with new ED and staff 	<ul style="list-style-type: none"> • New ED/ADMIN Committee/Museum staff

Strategic Direction II: Sustain Exhibits and Managed Growth for Facilities & Grounds

1. Exhibits, Facilities & Grounds

- Maintain and restore the existing facilities & exhibits on the main campus as appropriate;
- Continue restoration and renovation of Building T-1 as appropriate.

EXHIBITS & GROUNDS: Managed Growth		
Time	Action Items	Responsibility
<p>Year 1</p> <p>July 1, 2013 - June 30, 2014</p>	<ul style="list-style-type: none"> • Finish pathway to Trolley Barn • Complete Trolley Barn entrance • Finish Library Car restoration • Prepare new ADC exhibit • Review & Update Master Plan • Ongoing maintenance, as possible 	<ul style="list-style-type: none"> • Volunteers/Contractors/ED/Assistant Director (AD) • Volunteers/Contractors/ED/AD • Building & Grounds Committee (BGC)/Staff • Staff (Nicole) • ED/Staff/BGC • BGC/Volunteers (VOLS)/ED/AD

<p>Year 2</p> <p>July 1, 2014 – June 30, 2015</p>	<ul style="list-style-type: none"> • Trolley Barn—interior access ramp • Library Car—stairs • Interpretive Signs (as budget allows) • Homestead Barn work • Yearly Review of Master Plan 	<ul style="list-style-type: none"> • BGC/VOLS /New ED/ Contractors/AD • BGC/ VOLS /New ED/ Contractors/AD • BGC/ VOLS /New ED/ Education Director/ Contractors/AD/Nicole • BGC/ VOLS /New ED/ Contractors/AD/ Education Director • BGC/New ED/Staff
<p>Year 3</p> <p>July 1, 2015 – June 30, 2016</p>	<ul style="list-style-type: none"> • Prepare Trolley Barn Exhibit • Prepare Library Car Exhibit • Ongoing maintenance, as possible • Yearly Review of Master Plan 	<ul style="list-style-type: none"> • Staff/Nicole/Kristina/ Education Director • Staff/ Nicole/Kristina/ Education Director • BGC/ VOLS /New ED/ Contractors/AD • Staff/ BGC/New ED
<p>Ongoing</p>	<ul style="list-style-type: none"> • Identify and implement an educational component for every project, exhibit, and program (<i>carry-over from last Strategic Plan</i>) 	<ul style="list-style-type: none"> • Staff/ Education Director/ Education Committee

2. Exhibits, Facilities & Grounds

- Maintain and restore the existing facilities on the main campus as appropriate;
- Continue restoration and renovation of Building T-1 as appropriate.

FACILITIES – T-1: Continued Restoration		
Time	Action Items	Responsibility
Year 1 July 1, 2013 – June 30, 2014	<ul style="list-style-type: none"> • Build MASTER PLAN for T-1 <i>(Does re-financing make sense?)</i> • Raise \$36,000 for mortgage • Continue implementation of MASTER PLAN; Year-end review/update 	<ul style="list-style-type: none"> • ED (Bob)/Nicole/ AD/T-1 Committee/Leadership Team • ED/Kristina/T-1 Committee • ED/Staff/T-1 Committee
Year 2 July 1, 2014 – June 30, 2015	<ul style="list-style-type: none"> • Raise \$36,000 for mortgage • Implement MASTER PLAN: <i>Maintenance, Upkeep, & Infrastructure work</i> • Continue implementation of MASTER PLAN; Year-end review/update 	<ul style="list-style-type: none"> • New ED/Kristina/T-1 Committee • New ED/Staff/T-1 Committee • New ED/Staff/T-1 Committee
Year 3 July 1, 2015 – June 30, 2016	<ul style="list-style-type: none"> • Raise \$36,000 for mortgage • County completes ‘networking’ to facility <i>(online connection)</i> • Consider ‘Public Relations’ campaign regarding T-1 • Year-end review/update 	<ul style="list-style-type: none"> • New ED/Kristina/T-1 Committee • County staff/contractors • New ED/Staff/T-1 Committee • New ED/Staff/T-1 Committee
Ongoing	<ul style="list-style-type: none"> • Develop partnerships to maximize use of facilities • Complete renovations for new Department of Collections areas; possible tenant; new exhibitions 	<ul style="list-style-type: none"> • All • BGC/VOLS/Contractors/ New ED/T-1 Committee

Strategic Direction III: Achieve Organizational Scale—Maintenance Plan

1. Fundraising

- Create a plan that supports the museum’s current needs;
- Execute plan.

FUNDRAISING		
Time	Action Items	Responsibility
<p>Year 1 July 1, 2013 – June 30, 2014</p>	<ul style="list-style-type: none"> • Create a plan and a calendar for year one, that supports all initiatives <i>(Get both Boards to approve plan)</i> • Prioritize \$36K for T-1 mortgage • Raise \$20K through current programs/events • Raise \$2K in new money • Seek matching funds when possible • Fundraising as part of Board Development/training opportunities • Identify additional sources of revenue, including new members and new partners, additional sponsors 	<ul style="list-style-type: none"> • Kristina/ED (Bob)/ Friends Board/ Fundraising Committee (FC) • Kristina (lead)/ED/ Friends Board/FC • Kristina (lead)/ED/ Friends Board/FC • Kristina • Kristina • ED/Kristina/FC • Staff/Friends Board/FC
<p>Year 2 July 1, 2014 – June 30, 2015</p>	<ul style="list-style-type: none"> • Create a plan and a calendar for year two • \$36K + \$20K = \$56K (minimum, see yr 1) • Raise \$3K in new money • Begin developing Fundraising culture in Friends Board • Seek new Partners for events 	<ul style="list-style-type: none"> • Kristina/New ED/ Friends Board/FC • Kristina (lead)/New ED/ Friends Board/FC • Kristina • Kristina/staff/New ED/FC • Kristina/Friends Board
<p>Year 3 July 1, 2015 – June 30, 2016</p>	<ul style="list-style-type: none"> • Create a plan and a calendar for year three • \$36K + \$20K = \$56K (minimum, see yr 1) 	<ul style="list-style-type: none"> • Kristina/New ED/ Friends Board/FC • Kristina (lead)/New ED/ Friends Board/FC

Year 3 <i>(Cont.)</i>	<ul style="list-style-type: none"> Raise \$5K in new money 	<ul style="list-style-type: none"> Kristina
Ongoing	<ul style="list-style-type: none"> Develop Fundraising culture in Friends Board 	<ul style="list-style-type: none"> Kristina/staff/New ED/FC

2. Staffing

- Assess and strengthen staff team as possible;
- Continue professional development;
- Enhance communication.

STAFFING		
Time	Action Items	Responsibility
Year 1 July 1, 2013 – June 30, 2014	<ul style="list-style-type: none"> Review current staff job descriptions (including roles & expectations) and identify if staff job descriptions need modification---and if so, advance new descriptions for approval Align new staff team, appropriately; include use of interns Identify how volunteers are used and manage plan to maintain current levels of participation Continue supporting staff's professional development with conferences, workshops, etc. Create new opportunities for enhanced communication between Staff & Staff, and Staff & Boards, then execute plan 	<ul style="list-style-type: none"> Staff/ED (Bob)/Trustees Staff/ED Carolyn/Staff/ED Staff/ED Staff/Trustees/Friends Board
Year 2 & 3 July 1, 2014 – June 30, 2016	<ul style="list-style-type: none"> Review current and new staff positions with new ED. Adjust as needed. 	<ul style="list-style-type: none"> New ED/Staff

3. Outreach, Memberships, and Public Relations: Opportunistic & Strategic

- Meet and engage new community partnerships; engage broader community support;
- Increase & develop new memberships; sponsorship opportunities;
- Update/revise website & materials and engage deeper social media communications.

OUTREACH • MEMBERSHIPS • PUBLIC RELATIONS		
Time	Action Items	Responsibility
Year 1 July 1, 2013 – June 30, 2014	<ul style="list-style-type: none"> • Staff attends service clubs, ‘partner’ meetings, and businesses to engage new community partnerships & explore sponsorship opportunities • Transfer meaningful professional relationships to other staff/incoming ED • Monitor ongoing Regional Park planning • Begin/continue preparation for 150th Anniversary celebration (build plan) • Develop budget and plan for website revisions; seek contractor for work • Build yearly outreach and public relations calendars • Increase membership, 10% 	<ul style="list-style-type: none"> • Kristina/Staff • ED (Bob) • ED/staff • Nicole/staff • Nicole/Carolyn/staff/contractor • Staff/ED • Kristina/Friends Board
Year 2 July 1, 2014 – June 30, 2015	<ul style="list-style-type: none"> • Continue and deepen initiatives from Year 1 • Increase membership, 10% • Review/update outreach and public relations calendars • Consider advancing offsite exhibits 	<ul style="list-style-type: none"> • Staff/Trustees/Friends Board • Kristina/Friends Board • Staff/New ED • Staff/New ED
Year 3 July 1, 2015 – June 30, 2016	<ul style="list-style-type: none"> • Continue and deepen initiatives from Year 1 • Increase membership, 10% • Review/update outreach and public relations calendars 	<ul style="list-style-type: none"> • Staff/Trustees/Friends Board • Kristina/Friends Board • Staff/New ED

4. Evaluation

- Build an evaluation process that focuses on goals ensuring that the organization meets community needs and builds community ownership of HM@FM.

EVALUATION		
Time	Action Items	Responsibility
Ongoing	<ul style="list-style-type: none"> • Create and implement an annual operating plan that is regularly reviewed by Staff and Board • Formally review progress on the Strategic Plan and suggest improvements • Evaluate all programs and exhibits 	<ul style="list-style-type: none"> • Staff/ADMIN Committee/Boards • Staff/Boards • Staff/Boards

Plan Implementation

It will require commitment and resources to implement the strategic maintenance plan. All the prioritized goals have action plans that are implemented throughout each year. Monitoring, revising, and rewarding progress in all areas is an important role for leadership.

Periodic Evaluation

Evaluation is a best practice tool that helps the organization and those who fund it know what has been achieved with their efforts and investments. In the current funding world evaluation is necessary in order to compete as a professional nonprofit organization.

Invest in Staff and Board Leadership Development

Organizational growth and change may require new skills or new ways of working together. Investing in training for individuals and teams to prepare them for area expansion or new responsibilities increases the success and sustainability of changes.

Ensure Technology Plan Is in Place

Inventorying technology needs prior to expansion and increased demand is another best practice tool of growing organizations. Ensuring that resources are available for expansion areas, e.g., cell phone tours or fundraising donor software, avoids bottlenecks and expedites growth.

STRATEGIC DIRECTIONS

This Strategic Plan will primarily be dependent on the success of transitioning from the current long term Executive Director to his replacement. Although other initiatives will be ongoing before, during and after this primary initiative is completed, they will all be colored by this process. The deliberate attention to details regarding this transition will be instrumental to the success of all other stated initiatives.

CONCLUSIONS

- Staff, Board, and Friends all understand that competing choices for limited time and resources require careful planning in order to successfully navigate the next three years while building historical assets and community support;
- The mission and vision statements are important tools for guiding decisions during implementation of this strategic plan;
- Change can be hard for individuals as well as organizations. The change process requires setting, monitoring, and evaluating goals, and if needed, changing course;
- Change is both challenging and rewarding. Everyone needs to participate in order to ensure a smooth transition;
- Organizational leadership has to take the lead on implementing the plan.

Adopted by the Board of Trustees:

15 July, 2013

Ratified by the Friends Board of Directors:

_____, 2013