



**BRUCE COUNTY MUSEUM & CULTURAL CENTRE
5-YEAR STRATEGIC PLAN UPDATE**

Final Report

March, 2015

TCI Management Consultants

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Executive Summary

Background and Process

The Bruce County Museum & Cultural Centre (BCM&CC) reflects a long and proud history of showcasing the County's history and culture for more than 50 years. First established in 1955 in the old public school in Southampton, it has since transformed itself from a traditional 'community museum' into a major cultural offering for the County. In 2005, a \$13 million addition to the schoolhouse was built, adding on a considerable amount of exhibit and 'behind the scenes' space, and offering new functionality in the form of a theatre and cultural centre.

In June of 2008, the BCM&CC's first strategic plan was developed to guide the organization over the five year period from 2009 to 2013. While not all strategic initiatives were complete or even implemented over the period, it did serve as a reliable path to direct staff energies and financial resources. In 2014 the County determined that it is time to chart a new course for the future, and that is the point of the current plan.

As stated in the Terms of Reference: *"The plan should analyze the BCM&CC's opportunities and challenges and provide direction in regards to all aspects of the Museum's operations: museum & archive, space planning, storage, cooperation and collaboration with other organizations, sponsorship, exhibits, events, membership and promotion."*

Through a tender process, a consortium led by TCI Management Consultants was selected to undertake the strategy update. The team consisted of TCI (specialists in strategic planning in the museum and cultural organizations sector); Reich and Petch (architects and designers); the St. Clements Group (cultural marketing); Information Specialists Inc. (archival specialists) and KCI (fundraising experts).

A number of specific tasks were undertaken by the TCI team in conducting this assignment. These were: initial start-up meeting to discuss the overall methodology, interviews, dates, etc.; review of an extensive compilation of background materials; interviews and workshop meetings with key stakeholders; undertaking of a community survey (see **Appendix A** for the results of this survey); benchmark reviews of other jurisdictions (see **Appendix B**); an intensive 2-day 'Strategy Charrette' session (see **Appendix C**); an open house / public meeting with the consulting team; an assessment of fundraising potential (**Appendix D**); preparation of initial strategy outline based upon Charrette results, and refinement of this with Steering Committee and project team members; preparation of draft Strategy and Report; Council presentation and staff review of draft Report; and preparation of this Final Report.

The duration of the work was from September to the end of the year, 2014.

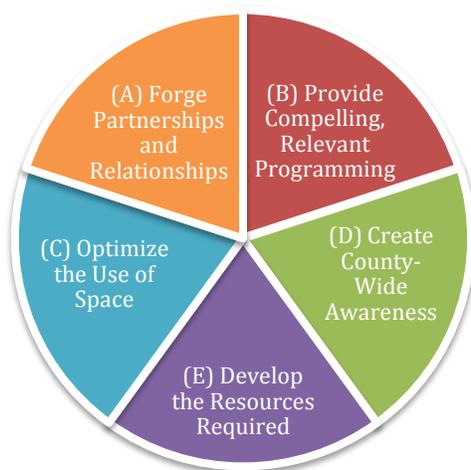
Key Recommendations Relating to Strategic Plan Update

A. The BCM&CC should retain its current mission of ‘Unforgettable’. This should be seen as an **instruction to staff** in terms of the types of experiences that should be created (whether they be in the context of the Museum, the Archives, or arts and culture activities) as well as the **promise to visitors** as to the kinds of experiences they will have, and the treatment they will receive by museum staff.

B. Five Pillar areas of Activity. Five key areas of strategic activity should be pursued by BCM&CC. These are called ‘strategic pillars’, and are:

1. Forge Partnerships and Relationships
2. Provide Compelling Relevant Programming
3. Optimize the Use of Space
4. Create County-Wide Awareness
5. Develop the Resources Required

The intent of this structure for the strategic plan is to show that the museum, archives and cultural program activities of the BCM&CC are all seamlessly integrated into one organization that provides services in the collection of relevant materials relating to the historical growth, development and current situation of Bruce County, and the interpretation of this resource through programs and activities both in the Centre and throughout the County.



Specific strategies proposed in each of these pillars are:

<p>(A) Forge Partnerships and Relationships</p>	<p>1) Continue relevant outreach programming</p> <p>2) Establish education advisory group and continue to develop curriculum-based programs for local school boards, as well as assist County as appropriate in pursuing post-secondary options (as per County strategic plan)</p> <p>3) Develop inter-organizational programming partnerships for programs at BCM&CC</p> <p>4) Continue strategic collaboration / expansion of programming with First Nations and Boards of Education</p>
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(B) Provide Relevant, Compelling Programming	<p>5) Create three-year sustainability plan for programs, activities and exhibits</p> <p>6) Develop digital access strategy for selected items from the archives and museum collection</p>
(C) Optimize the Use of Space	<p>7) Develop an Archives collecting plan that is complementary to and consistent with the existing BCM&CC Museum Collections plan, and ensure broader awareness of both collecting mandates</p> <p>8) Create accommodation plan</p>
(D) Create County-Wide Awareness	<p>9) Develop a marketing plan to achieve, over time, County-wide awareness of the BCM&CC</p>
(E) Develop the Resources Required	<p>10) Develop fundraising plan grounded in Value Proposition established, for specific projects identified</p> <p>11) Increase resources for volunteer management and coordination</p> <p>12) Implement cost-recovery policy for key services beyond admission for programming and interpretation</p>

Implementation of the Strategy

A detailed implementation framework over the next five years is contained within the Report, that specifies roles and responsibilities for the BCM&CC by Department, as well as the anticipated activities of other community groups and organizations in terms of helping make the plan a reality. Also, the strategic directions as outlined in this plan carry with them certain staffing and other financial implications, which are addressed below:

Staffing

There are two additional staff positions implied by the Plan. (These are in addition to the current vacancy in the Business Manager position, which clearly should be filled as soon as possible in order to assist with the immediate implementation [in early 2015] of this strategy.) These two additional positions (which would not be implemented until mid-way through the next 5-year period) are:

- 1) **Development Position:** A development officer position is envisaged for the creation of a fundraising strategy (for both capital and operating items) in Year 2 of the plan (2016). Key responsibilities of this position would be to develop a fundraising plan (probably in concert with fundraising professionals – see below) and the development of a mechanism for receiving charitable donations. This could be a part-time position starting in Year 2 of the plan and then likely becoming a full-time position in Year 3 (i.e. 2017) and on.

- 2) **Volunteer Coordinator:** A second staffing need implied by the plan would be for a full-time volunteer coordinator position. This would be an elevation of the current volunteer position to a full-time effort. The timeframe for the development and recruitment for this position would be Year 2 (2016) or year 3 (2017) of the plan. Key responsibilities of this position would be to identify the need for volunteer placements; advertise and otherwise procure volunteers; training; coordination;

and recognition and reward of volunteers. The development of a policy and plan that provided the grounding for these activities would be a key initial activity associated with this position.

It is worth noting that both these positions are oriented towards developing additional resources for the institution. Fundraising staff are typically expected to raise between a 3 and 4 times multiple of their salary at a minimum, so this would generate additional revenues for the BCM&CC, and contribute to the cost-recovery targets discussed in Strategic Initiative #12. The Volunteer Coordinator position, while not generating financial resources for the institution (at least, not directly), would contribute valuable volunteer time to the BCM&CC, allowing it to expand its scope of activities in the various areas of activity outlined in this plan.

It is premature at this point to specify the exact salary, wage and benefits implications of these two additional positions, but the total additional compensation (i.e. staffing costs) would likely be on the order of \$80,000 to \$130,000. Compensation for the fundraising position would likely be higher than that for the volunteer coordinator position.

As well, towards the end of the five-year period (Years 2018 and 2019) as additional resources are generated, it would be possible to augment other critical areas of performance of the BCM&CC: collections (both Archives and Museum) exhibits, programming, and marketing.

Other Financial Implications

There are several other areas where specific additional costs are anticipated. These are:

Creation of Accommodation Plan: Strategic initiative #8 is related to the development of an Accommodation Plan, which would re-purpose the existing space within the existing footprint of the BCM&CC, after an internal review of space utilization by staff. While this could be undertaken internally, our recommendation is that a museum architect be retained to develop such a plan, based upon a Terms of Reference designed by staff (which is thus reflective of their needs and desires). The likely cost of this initiative would be between \$20,000 and \$30,000. It is anticipated that the development of this plan would occur in Year 2 (2016) for implementation in 2017 and beyond. The costs of the implementation of the Accommodation Plan itself would of course be an element of the study and cannot be estimated with any certainty at this time. Also, there is some possibility that by the time the Accommodation Study is underway, additional space possibilities (such as vacant schools or other buildings) may present themselves as accommodation options to be considered.

County-Wide Recognition Plan (CWRP): Strategic initiative #9 recommends the development of a County-Wide Recognition Plan to ensure that there is a high level of awareness of the existence of the BCM&CC, and ideally to instill a desire to visit it and participate in programs on the part of residents from across the County. While marketing and other senior staff at the Museum may have the expertise required to develop such a plan, we have perhaps more conservatively assumed that outside expertise may be required for its development. The cost of development of the plan would likely be on the order of \$15,000 to \$25,000, and expertise should be retained through a tender process (where familiarity with and experience in the County would be key requirements of the selected resource). This would likely occur in Year 2 of the plan (2016).

Creation of Fundraising Strategy: Strategic initiative #10 is focused upon the need and opportunity for the BCM&CC to become more active in overall fundraising. The need for a development staff position has already been discussed, but a necessary companion initiative would be the creation of a fundraising plan as an essential complement to guide the activities of this

individual. While it is possible that the fundraising resource person could by themselves develop a fundraising strategy (depending upon their seniority, contacts, experience, etc.) the more prudent course is to assume that the BCM&CC will want to retain fundraising expertise to assist with the development of the initiative. We anticipate that, if required, this would take place in the latter half of 2016 or possibly the early part of 2017. (The fundraising plan should be developed with the assistance and input of the individual retained as the Development Officer.) Costs for the development of the plan would likely range in the \$30,000 to \$50,000 range. (See the Appendix for a fuller discussion of what would be involved in the strategy itself.)

1. Introduction

1.1 Overview of Operations of the BCM&CC

The Bruce County Museum & Cultural Centre (BCM&CC) reflects a long and proud history of showcasing the County's history and culture for more than 50 years. First established in 1955 in the old public school in Southampton, it has since transformed itself from a traditional 'community museum' into a major cultural offering for the County. In 2005, a \$13 million addition to the schoolhouse was built, adding on a considerable amount of exhibit and 'behind the scenes' space, and offering new functionality in the form of a theatre and cultural centre.

The budget of the BCM&CC at present (2014) has a core administrative budget of approximately \$1.5 million. There are 14 individuals employed full-time (FT) at the BCM&CC, and 4 part time (PT). At the time of initiation of the strategic review, there is 1 vacant position – that of the Business Manager.

The current strategic positioning of the BCM&CC is defined in terms of mission, relationship-building, professionalism and its unique educational role. The relevant strategic statements are:

Mission	“UNFORGETTABLE”
Relationships	The BCM&CC: <ul style="list-style-type: none">- actively seeks partnerships in achieving our mission- practices effective communication- promotes fun and accessibility- actively seeks and recognizes the contributions of our supporters
Professionalism	The BCM&CC: <ul style="list-style-type: none">- is accountable and demonstrates best professional practice in all operations and relationships- takes a client centered and interactive approach in our programs in a friendly and welcoming environment- believes in the importance of staff development in its efforts to be an effective resource to the community and a leader in the province
Education	The BCM&CC: <ul style="list-style-type: none">- promotes the depth and diversity of our heritage- offers many activities that encourage meaningful reflection on the past in order to better understand the present and thus plan for the future- promotes the value of its collection and archives as a prime resource for research at all levels of learning

1.2 Previous BCM&CC Strategic Plan, 2009 – 2013

In June of 2008, the BCM&CC's first strategic plan was developed to guide the organization over the five year period from 2009 to 2013. This plan consisted of 6 key strategies and 24 sub-strategies, which were:

Strategy	Strategic Actions
Strategy A: Set a bold Museum display and exhibits program development path	A1 Review collection inventory, generate themes and story lines, and accelerate display rotations A2 Increase volume of temporary displays with team planning process A3 Develop General Hunter Exhibit and Lake Huron Learning Program A4 Energize the BCM&C School Program and tourism promotions with the General Hunter Exhibit and Lake Huron Learning
Strategy B: Be the recognized knowledge source for Bruce County natural history and cultural heritage	B1 Focus the growth and branding of the museum's permanent collections on the county's natural history and cultural heritage B2 Enhance the Archive's ability to represent the county's cultural heritage B3 Promote county history and cultural heritage learning in BCM&CC B4 Innovate the digital approach to knowledge transfer
Strategy C: Establish key directions and business planning for the Museum, Cultural Centre and Archives	C1 Establish a Living Archive with communities across Bruce County C2 Position the Museum as a place of discovery and creative excellence C3 Make the Cultural Centre a hub for the exchange of ideas and a catalyst for community engagement C4 Treat each strategic path as a business channel
Strategy D: Strengthen BCM&CC management practices and foster a greater service culture	D1 Implement management review and service training D2 Develop a Media Arts and Graphic Design Centre D3 Develop a Museum Interpreter Program D4 Manage volunteerism for growth and sustainability
Strategy E: Build a dynamic Outreach Program which integrates education, volunteers and sponsorships	E1 Involve volunteers in education and continued learning E2 Involve sponsors directly in education and continued learning E3 Involve schools in volunteer support E4 Build linked network of education, business and industry sponsors and partners
Strategy F: Implement a five-year Branding Strategy and Identity Action Plan	F1 Make the brand fun and create a long-term vision and identity F2 Develop a new integrated Marketing, Promotions and Sponsorship Program for BCM&CC F3 Establish critical, independent identity paths for the Museum, Cultural Centre and Archives F4 Focus on seasonal and targeted branding and marketing

Detailed implementation plans for each of these strategic action areas were developed that specified responsibilities and timelines, for each of the years from 2009 to 2013.

This plan guided the development path for the institution over the five year period. While not all strategic initiatives were complete or even implemented over the period, it did serve as a reliable path to direct staff energies and financial resources. However, now in 2014 it is time to chart a new course for the future, and that is the point of the current plan.

1.3 Objectives of the Present Study

As stated in the Terms of Reference: *"The plan should analyze the BCM&CC's opportunities and challenges and provide direction in regards to all aspects of the Museum's operations: museum & archive, space planning, storage, cooperation and collaboration with other organizations, sponsorship, exhibits, events, membership and promotion."*

Particular areas of focus for the plan were:

- Identify new synergies and programming opportunities that will engage new segments of the cultural, economic and educational segments of the Bruce County communities and surrounding

regions;

- to overcome economic barriers and fulfill the need to better utilize BCM&CC's enlarged capacities by linking new programs to new sponsorship opportunities while drawing larger public audiences;
- to overcome cultural and geographic barriers by identifying special programs that touch into and showcase the special attributes of the communities across Bruce, Grey and Huron Counties, making the BCM&CC a focal point in using the region's local history to establish new programs and incentives which have audience appeal within the community, the local region, and the wider regions; and
- to build a platform for the voluntary sector, including social services organizations, to participate in the long-term vision of the BCM&CC, and finding a role in using its resources to enhance local economic opportunities, whether in tourism, artisan crafts or other areas.

Through a tender process, a consortium led by TCI Management Consultants was selected to undertake the strategy update. The team consisted of TCI (specialists in strategic planning in the museum and cultural organizations sector); Reich and Petch (architects and designers); the St. Clements Group (cultural marketing); Information Specialists Inc. (archival specialists) and KCI (fundraising experts).

1.4 Process of Updating the Plan

A number of specific tasks were undertaken by the TCI team in conducting this assignment. These were:

- initial start-up meeting to discuss the overall methodology, interviews, dates, etc.
- review of an extensive compilation of background materials
- interviews and workshop meetings with key stakeholders
- benchmark reviews of other jurisdictions
- undertaking of a community survey (see Appendix A for the results of this survey)
- an intensive 2-day 'Strategy Charrette' session (see next section of the Report)
- an open house / public meeting with the consulting team
- preparation of initial strategy outline based upon Charrette results, and refinement of this with Steering Committee and project team members
- preparation of draft Strategy and Report
- Council and staff review of draft Report
- preparation of Final Report

The duration of the work was from September to the end of the year, 2014.

1.5 The Strategy Charrette

A key and highly unique element of the study process was the 'Strategy Charrette', held on Wednesday October 7th and Thursday October 8th, at the BCM&CC. All study team members attended this 2-day session and lent their expertise to the process. The intent was to gather a wide range of individuals from the Bruce County representing all facets of the community, for intensive dialogue and discussion about the strategic directions that the institution should be pursuing.

Approximately 50 people attended the first day (Wednesday) of the session. The basic format of this day was presentation by the 'industry experts' (i.e. the study team members) about key trends and issues that

should be considered in the development of a strategic plan for a museum operation, followed by intensive small group discussion in key areas that would ultimately form the basis of the plan. (See Appendix C for a copy of this presentation.) The second day was devoted to discussion and priority-setting by the staff and the consultants on the strategies, actions and initiatives that came out of the discussions held on the previous day. Any participants from the previous day were invited to come along to 'Day 2' of the Charrette as they were able, and approximately 10 did.

That evening (i.e. the Wednesday) a public meeting / open house was held with the full consulting team so that any members of the public could come and make their views known.

On the second day, the essential outline and structure of the strategy was agreed to by staff and consultants. This then formed the basis for the consulting team's further investigations, as well as the final strategy developed.

2. Strategic Directions, 2014 - 2019

2.1 BCM&CC Mission

The current mission of the BCM&CC is '**Unforgettable**'. This extremely simple yet evocative phrase is highly unusual as a Mission Statement for a museum-type organization, which typically tends to describe the organization's operation in terms of collecting, conserving, developing exhibits and programs, etc. However, BMC&CC is an entity that has essentially three components to its operation: 1) a museum; 2) an archives; and 3) an arts and cultural centre. A mission statement that described the operations of such a three-part entity clearly would run the risk of being long, complex, unmanageable and unmemorable.

The alternative mission of 'Unforgettable' on the other hand has the virtue of being very short and memorable. As an aspirational statement, it has the interesting characteristic of describing both the intention underlying the types of experiences that are being created for the public, as well as describing (ideally) the kinds of experiences that visitors have at the BCM&CC.

In the consultation process, there was no real concern with the current Mission, other than some small complaint that it could describe 'anything' – i.e. that there was nothing in the statement itself that would signal to the uninitiated what kind of organization BCM&CC actually was. However, this was by no means a strongly held or frequently-voiced opinion.

Accordingly, this update of the strategic plan has retained the BCM&CC's Mission of 'Unforgettable' – interpreting it both as an **instruction to staff** in terms of the types of experiences that should be created (whether they be in the context of the Museum, the Archives, or arts and culture activities) as well as the **promise to visitors** as to the kinds of experiences they will have, and the treatment they will receive by museum staff.

In the current strategic plan, this Mission is further expressed in terms of how it plays out in term of relationships, professionalism and education. This update also endorses these dimensions of the Mission, with the slight refinements suggested below. (The suggested refinements, based upon the consultation and the Strategy Charrette session) are presented below in red typeface:

<p>Relationships</p>	<p>The BCM&CC:</p> <ul style="list-style-type: none"> - actively seeks partnerships in achieving our mission - focuses upon creating value and sustainability in relationships with partners - practices effective communication - promotes fun and accessibility - actively seeks and recognizes the contributions of our supporters
<p>Professionalism</p>	<p>The BCM&CC:</p> <ul style="list-style-type: none"> - is accountable and demonstrates best professional practice in all operations and relationships - takes a client centered and interactive approach in our programs in a friendly and welcoming environment, focusing upon the provision of interesting and memorable experiences for visitors - believes in the importance of staff development in its efforts to be an effective resource to the community and a leader in the province

Education	The BCM&CC: <ul style="list-style-type: none"> - promotes the depth and diversity of our heritage - strives to ensure that all educational experiences are exciting and memorable for participants - offers many activities that encourage meaningful reflection on the past in order to better understand the present and thus plan for the future - promotes the value of its collection and archives as a prime resource for research at all levels of learning
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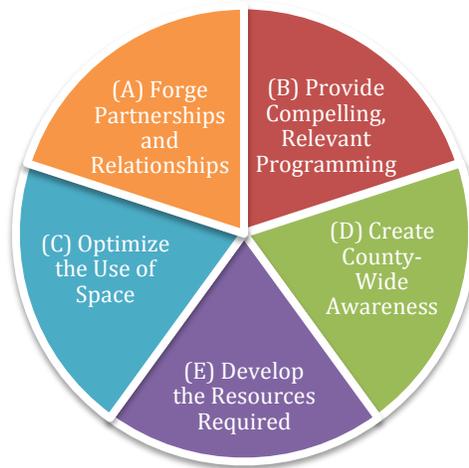
2.2 Pillar Activity Areas and Specific Actions

The interview program suggested, and the Strategy Charrette confirmed, that staff and stakeholders see five key areas of strategic activity being pursued by BCM&CC. These are called ‘strategic pillars’, and are:

6. **Forge Partnerships and Relationships:** A measure of the utility and relevance of the BCM&CC is the extent to which it is able to develop partnerships and relationships with other County-level organizations. These provide credibility, resources, and reach to the BCM&CC (in the sense of helping them to get out of the building and serve people across the County).
7. **Provide Compelling Relevant Programming:** A strong focus on providing relevant programming is inherent in the plan. Relevance is demonstrated by awareness and interest in exhibits and programs, translating into visitation and participation.
8. **Optimize the Use of Space:** The process revealed many areas in which the existing footprint of the building was not being used to best advantage. A third strategic pillar is thus to ensure that existing space is being used for maximum benefit and, once this has been achieved, to assess current and future needs for more space for key critical functions.
9. **Create County-Wide Awareness:** It is recognized that as a County-level institution, the BCM&CC needs to be seen as such and strive to overcome a ‘Southampton-centric’ focus. Strategically, the first task is to create a higher level of County-wide awareness, which then over time will translate to higher levels of awareness and attendance. This, of course, also supports the importance of partnerships that can help take programs (and possibly exhibits) into the farther reaches of the County.
10. **Develop the Resources Required:** All of the foregoing requires resources – both staff and financial – and the fifth essential pillar of the strategy examines ways and means of increasing those resources available to the BCM&CC.

The intent of this structure for the strategic plan is to show that the museum, archives and cultural program activities of the BCM&CC are all seamlessly integrated into one organization that provides services in the collection of relevant materials relating to the historical growth, development and current situation of Bruce County, and the interpretation of this resource through programs and activities both in the Centre and throughout the County.

This can be shown as:



Specific strategies proposed in each of these pillars are:

<p>(A) Forge Partnerships and Relationships</p>	<p>1) Continue relevant outreach programming</p> <p>2) Establish education advisory group and continue to develop curriculum-based programs for local school boards, as well as assist County as appropriate in pursuing post-secondary options (as per County strategic plan)</p> <p>3) Develop inter-organizational programming partnerships for programs at BCM&CC</p> <p>4) Continue strategic collaboration / expansion of programming with First Nations and Boards of Education</p>
<p>(B) Provide Relevant, Compelling Programming</p>	<p>5) Create three-year sustainability plan for programs, activities and exhibits</p> <p>6) Develop digital access strategy for selected items from the archives and museum collection</p>
<p>(C) Optimize the Use of Space</p>	<p>7) Develop an Archives collecting plan that is complementary to and consistent with the existing BCM&CC Museum Collections plan, and ensure broader awareness of both collecting mandates</p> <p>8) Create accommodation plan</p>
<p>(D) Create County-Wide Awareness</p>	<p>9) Develop a marketing plan to achieve, over time, County-wide awareness of the BCM&CC</p>
<p>(E) Develop the Resources Required</p>	<p>10) Develop fundraising plan grounded in Value Proposition established, for specific projects identified</p> <p>11) Increase resources for volunteer management and coordination</p> <p>12) Implement cost-recovery policy for key services beyond admission for programming and interpretation</p>

Below more specific details on each of the strategies are provided (note that Chapter 3 of this document is devoted to a more specific implementation plan).

(A) Forge Strategic Partnerships and Relationships

1) Continue relevant outreach programming (bringing BCM&CC programs to community events [e.g. Steam Show], malls, homecomings, etc.; taking education programs to other groups and areas of the County)

a) establish relationships with target outreach organizations:

- County departments (e.g., libraries, social services, IT, etc.)*
- lower tier municipalities (Fall Fairs, parades, festivals, events, etc.)*
- school boards*
- museums, cultural organizations, chambers of commerce, businesses, etc.*

b) develop specific plans for interested groups

c) explore the use of digital media and the Internet to expand educational programming opportunities

- explore the use of videoconferencing, digital programming, virtual exhibits, etc. to expand educational outreach opportunities

2) Establish education advisory group and continue to develop curriculum-based programs (especially STEM¹) for local school boards, as well as assist County as appropriate in pursuing post-secondary options (as per County strategic plan)

a) establish group

b) review opportunities, challenges, possible synergies

c) develop programming goals, plan, budget, timing, implementation

d) review and adapt education programming for specific groups and needs

e) explore innovative technologies (or use of students' technologies) for possible inclusion in education programming

f) meet with County to review and support post-secondary initiatives

g) explore innovative funding possibilities

h) evaluate, amend, repeat

3) Develop inter-organizational programming partnerships for programs at BCM&CC –

developing programming relevant to specific organizations and encouraging them to come to the BCM&CC – e.g. County, library, lower tier, other museum & cultural centres across County, community organizations such as Probus, Optimists, Chantry singers, multicultural organizations, etc.)

a) establish long list of contacts

b) contact each group for possible collaboration, partnerships

c) review opportunities, challenges, possible synergies

d) develop programming goals, plan, budget, timing, implementation

¹ Science, Technology, Engineering and Mathematics

- e) *explore innovative funding possibilities*
- f) *evaluate, amend, repeat*
- g) *continue discussions with Institute for Canadian Citizenship – Cultural Access Pass program and evaluate benefits of BCM&CC offering this program to new Canadians*

4) Continue collaboration and expansion of programming with First Nations (provide resources for them to tell their stories, provide resources to assist them with records management, explore opportunities to take exhibitions and programs to their communities, work collaboratively on museum-based exhibits and programming, etc.)

- a) *continue to collaborate and meet with First Nations representatives to review opportunities for collaboration*
- b) *meet with adjacent County museums for advice and to review possible areas for collaboration*

(B) Offer Relevant, Compelling Programming

5) Create three-year sustainability plan for programs, activities and exhibits, that accomplishes the following:

- a) *continues and expands the philosophy of animating the galleries and bringing programming activity to the gallery floor;*
- b) *creates a balance between ‘intimate’ and ‘wide open’ spaces;*
- c) *considers contemporary issues and their links to the County’s history;*
- d) *responds to the need for periodic major exhibits brought in as attendance generator;*
- e) *responds to the ‘two season’ nature of audience interest (tourist/visitor/cottager in summer; resident at other times);*
- f) *has exhibits and activities relating to the archives on the ground floor (informing public that ‘Archives’ is an available resource in the facility)*

6) Develop digital access strategy for selected items from the archives and museum collection (digitization of records, photographs, etc.; on-line catalogue; ‘how-to’ videos; educational resources, exhibits, etc.)

(C) Optimize the Use of Space

7) Develop an Archive collecting plan that is complementary to and consistent with the existing BCM&CC Museums Collections plan, and ensure broader awareness of both collecting mandates: this would result in:

- a) *freeing up of storage space making room for future acquisitions*
- b) *creation of a ‘teaching collection’ [from duplicate artifacts and document copies from the archives] that could be used in programming*
- c) *enable publication of collections policy on-line [maybe as FAQs] to help guide future acquisitions (as well as deflect inappropriate or unnecessary artifact donations)*

8) Create accommodation plan to:

- a) *maximize / optimize / re-purpose the utilization of existing space for all departments, and then:*
- b) *make the case for the needed expansion space for storage (both archives and artifacts), artifact conservation and exhibit preparation, including the strategic acquisition of other County properties – in this area, consider dedicated space in which volunteers can work undisturbed*

(D) Create County-Wide Awareness (Marketing)

Value proposition: *We connect residents (current and former) and visitors to the history of the County. Also emphasize particular areas of distinctive heritage: marine heritage, First Nations.*

Marketing Objective: *Ensure every resident of the County is aware of the museum, what it offers, and what its value is.*

9) Develop a marketing plan to achieve, over time, County-wide awareness of the BCM&CC

(including market research that measures levels of awareness, visitor demographics, nature of the visitor experience, etc.) – this to consider:

- a) *what are we 'selling' (will reflect Value Proposition)*
- b) *definition of the target audiences (will reflect marketing objective)*
- c) *what level of awareness is being targeted, and how is this to be measured?*
- d) *what is our competitive advantage?*
- e) *what is our marketing message*
- f) *what is our brand / image / identity?*
- g) *what mix of media is appropriate to expand awareness?*

(E) Develop the Resources Required

10) Develop fundraising plan grounded in Value Proposition established, for specific projects

identified: (digitization projects; accommodation plan projects; free admission, sponsorship of bus tours, outreach projects [e.g. exhibit cases to be placed in libraries], etc.) – the key components of such an approach would be:

- a) *in concert with Marketing, determine the Why, What and So What related to the fundraising priorities*
- b) *articulate clear benefits of BCM&CC for sponsors*
- c) *create a mix of fundraising techniques (sponsorship/philanthropy/planned giving)*
- d) *secure a mechanism for receiving charitable donations (i.e. a Foundation)*

11) Increase resources for volunteer management and coordination

(recognizing the magnitude and excellence of the volunteer resource available to BCM&CC, this warrants greater attention to ensure optimal coordination, recognition, and growth of the volunteer resource) – a key project would be to recruit a specific team of fundraising volunteers with influence and affluence, members of which are comfortable approaching others for funds

12) Implement cost-recovery policy for key services beyond admission for programming and interpretation: e.g. behind the scenes tours, intensive research assistance in the archives [beyond basic introduction to procedures] etc.

3. Implementation of the Plan

3.1 Task, Responsibilities and Timelines

Below is an implementation plan showing the recommended implementation in terms of responsibilities and timeline for each task identified as part of the strategy. It is important to note that this implementation plan is not 'written in stone' – inevitably some of the tasks will be done sooner, and some later, than shown here. This is natural, as other opportunities arise, emergencies happen, resources become available, etc. However, the implementation framework should be reviewed and updated on an annual basis to ensure that all aspects of the strategy are considered and put into place as soon as is reasonably possible.

Task	Responsibility	Timeline
(A) Forge Strategic Partnerships and Relationships		
1) Continue relevant outreach programming		
<i>a) establish relationships with target outreach organizations</i>	BCM&CC senior management	First half 2015 to identify organizations
<i>b) develop specific plans for interested groups</i>	BCM&CC program staff	Second half 2015, and on-going
<i>c) explore the use of digital media and the Internet to expand educational programming opportunities</i>	BCM&CC program staff	2016 - see 6c
2) Establish education advisory group and continue to develop curriculum-based programs		
<i>a) establish group</i>	BCM&CC senior management would form Education Advisory Group (EAG) (would involve outside interests)	First half 2015
<i>b) review opportunities, challenges, possible synergies with each group identified</i>	BCM&CC program staff, with EAG	Second quarter 2015
<i>c) develop programming goals, plan, budget, timing, implementation</i>	BCM&CC program staff, with EAG	Latter half of 2015
<i>d) review and adapt education programming for specific groups and needs</i>	BCM&CC program staff, with EAG	On-going
<i>e) explore innovative technologies for possible inclusion in education programming</i>	BCM&CC program staff, with EAG	On-going
<i>f) meet with County to review and support post-secondary initiatives</i>	BCM&CC to ensure County knows of its interest and availability - County initiative to set up meeting	2015 or 2016
<i>g) explore innovative funding possibilities</i>	BCM&CC program staff	On-going
<i>h) evaluate, amend, repeat</i>	BCM&CC program staff	On-going
3) Develop inter-organizational programming partnerships for programs at BCM&CC		
<i>a) establish long list of contacts</i>	BCM&CC senior management	Latter half, 2015
<i>b) contact each group for possible collaboration, partnerships</i>	BCM&CC program staff	2016
<i>c) review opportunities, challenges, possible synergies</i>		
<i>d) develop programming goals, plan, budget, timing, implementation</i>		
<i>e) explore innovative funding possibilities</i>	BCM&CC development staff (see Section 3.2)	2017 and on
<i>f) evaluate, amend, repeat</i>		
<i>g) continue discussions with Institute for Canadian Citizenship – Cultural Access Pass program and evaluate benefits of BCM&CC offering this program to new Canadians</i>	BCM&CC senior management	First quarter, 2015

Task	Responsibility	Timeline
4) Continue collaboration and expansion of programming with First Nations		
a) continue to collaborate and meet with First Nations representatives to review opportunities for collaboration	BCM&CC senior management and program staff	On-going
b) meet with adjacent County museums for advice and to review possible areas for collaboration	BCM&CC senior management	Latter half of 2015 and into 2016

(B) Offer Relevant, Compelling Programming		
5) Create three-year sustainability plan for programs, activities and exhibits		
a) create initial version of plan for years 2015 through 2017	BCM&CC exhibit staff	Develop first version of plan first half 2015
b) update plan for 2016	BCM&CC exhibit staff	2016
c) continue annual updates of plan	BCM&CC exhibit staff	2017 to 2019 (annual updates)
6) Develop digital access strategy for selected items from the archives and museum collection		
a) articulate principles underlying digital access strategy	BCM&CC archives and collections staff	First quarter, 2015
b) develop plan for digitization and roll-out	BCM&CC archives and collections staff	Balance of 2015
c) implement plan for digitization and roll-out	BCM&CC archives and collections staff	2016, and on

C) Optimize the Use of Space		
7) Develop an Archive collecting plan that is complementary to and consistent with the existing BCM&CC Museums Collections plan, and ensure broader awareness of both collecting mandates		
a) identify areas of gaps and overlaps between archives and collections	BCM&CC archives and collections staff	First half, 2015
b) develop Archives collection plan	BCM&CC archives staff	Second half, 2015
c) identify ways and means of communicating BCM&CC's overall collecting plan	Create Task Force: BCM&CC archives, collections and marketing staff	2016, and on
8) Create accommodation plan		
a) identify areas where existing space could be re-purposed and more efficiently utilized	Create Task Force: BCM&CC archives, collections and marketing staff	2015
b) based upon a), develop Terms of Reference for Accommodation Plan (for external consulting assistance) and BCM&CC Steering Group	BCM&CC senior management	First half 2016
c) complete Accommodation Plan	BCM&CC Steering Group	Second half 2016
d) implement Accommodation Plan	BCM&CC senior management	2017

Task	Responsibility	Timeline
(D) Create County-Wide Awareness (Marketing) Plan		
9) Develop a marketing plan to achieve, over time, County-wide awareness of the BCM&CC		
a) articulate marketing objectives: levels of awareness (possibly by municipality)	BCM&CC marketing staff	First half 2015
b) benchmark current levels of awareness, interest, participation; revise targets if required	BCM&CC marketing staff	Second half 2015
c) create marketing and promotion plan (County-Wide Recognition Plan, or CWRP) to create target levels of awareness	BCM&CC marketing staff	First half, 2016
d) implement CWRP	BCM&CC marketing staff	Second half 2016, and on-going
d) monitor awareness levels CWRP; adjust marketing activities as required to meet awareness targets (or adjust targets if necessary)	BCM&CC marketing staff	2017, and on-going

(E) Develop the Resources Required		
10) Develop fundraising plan grounded in Value Proposition established, for specific projects identified		
a) in concert with Marketing, determine the Why, What and So What related to the fundraising priorities) – see Appendix	BCM&CC senior management	First half, 2015
b) articulate clear benefits of BCM&CC for sponsors	BCM&CC senior management	Second half, 2015
c) create a Fundraising Strategy containing a mix of fundraising techniques (sponsorship/philanthropy/planned giving)	BCM&CC development staff (see Section 3.2)	2016
d) secure a mechanism for receiving charitable donations (i.e. a Foundation)	BCM&CC development staff	2017
11) Increase resources for volunteer management and coordination		
a) identify specific needs of the volunteer program: recruitment, training, recognition, social activities, etc. and future needs for volunteer placements: determine need for FT volunteer coordinator	Task Force formed by BCM&CC senior management	First half, 2016
b) develop specifications for full-time volunteer coordinator (if determined that this position required)	BCM&CC senior management	Second half, 2016
c) recruit position	BCM&CC development staff (see Section 3.2)	2017
d) develop and implement Volunteer Recruitment, Management and Coordination (VRMC) plan	BCM&CC development staff (see Section 3.2)	2018 and on
12) Implement cost-recovery policy for key services beyond admission for programming and interpretation		
a) meet with County to determine cost recovery policies or guidelines that could apply to the BCM&CC	BCM&CC senior management	First half, 2016
b) identify areas of current or potential operations where material cost recovery initiatives are possible	BCM&CC senior management	Second half, 2016
c) begin implementing cost-recovery activities, procedures and mechanisms	BCM&CC financial staff	2017
c) track and report upon cost-recovery initiatives on an on-going basis	BCM&CC financial staff	2017, and ongoing

3.2 Staffing and Budget Implications

The strategic directions as outlined in this plan carry with them certain staffing and other financial implications, which are addressed below:

Staffing

There are two additional staff positions implied by the Plan. (These are in addition to the current vacancy in the Business Manager position, which clearly should be filled as soon as possible in order to assist with the immediate implementation [in early 2015] of this strategy.) These two additional positions (which would not be implemented until mid-way through the next 5-year period) are:

- 3) **Development Position:** A development officer position is envisaged for the creation of a fundraising strategy (for both capital and operating items) in Year 2 of the plan (2016). Key responsibilities of this position would be to develop a fundraising plan (probably in concert with fundraising professionals – see below) and the development of a mechanism for receiving charitable donations. This could be a part-time position starting in Year 2 of the plan and then likely becoming a full-time position in Year 3 (i.e. 2017) and on.
- 4) **Volunteer Coordinator:** A second staffing need implied by the plan would be for a full-time volunteer coordinator position. This would be an elevation of the current volunteer position to a full-time effort. The timeframe for the development and recruitment for this position would be Year 2 (2016) or year 3 (2017) of the plan. Key responsibilities of this position would be to identify the need for volunteer placements; advertise and otherwise procure volunteers; training; coordination; and recognition and reward of volunteers. The development of a policy and plan that provided the grounding for these activities would be a key initial activity associated with this position.

It is worth noting that both these positions are oriented towards developing additional resources for the institution. Fundraising staff are typically expected to raise between a 3 and 4 times multiple of their salary at a minimum, so this would generate additional revenues for the BCM&CC, and contribute to the cost-recovery targets discussed in Strategic Initiative #12. The Volunteer Coordinator position, while not generating financial resources for the institution (at least, not directly), would contribute valuable volunteer time to the BCM&CC, allowing it to expand its scope of activities in the various areas of activity outlined in this plan.

It is premature at this point to specify the exact salary, wage and benefits implications of these two additional positions, but the total additional compensation (i.e. staffing costs) would likely be on the order of \$80,000 to \$130,000. Compensation for the fundraising position would likely be higher than that for the volunteer coordinator position.

As well, towards the end of the five-year period (Years 2018 and 2019) as additional resources are generated, it would be possible to augment other critical areas of performance of the BCM&CC: collections (both Archives and Museum) exhibits, programming, and marketing. The most pressing need in this regard may be in programming, as much of the comment from both the Charrette session as well as the community survey revealed a desire for new and innovative public programs (in a wide range of areas including arts and culture). So too, the benchmarking initiative of this project revealed that one of the fastest-growing areas of demand in other institutions is with respect to public programs (arts and culture, and adult programming).

Other Financial Implications

There are several other areas where specific additional costs are anticipated. These are:

Creation of Accommodation Plan: Strategic initiative #8 is related to the development of an Accommodation Plan, which would re-purpose the existing space within the existing footprint of the BCM&CC, after an internal review of space utilization by staff. While this could be undertaken internally, our recommendation is that a museum architect be retained to develop such a plan, based upon a Terms of Reference designed by staff (which is thus reflective of their needs and desires). The likely cost of this initiative would be between \$20,000 and \$30,000. It is anticipated that the development of this plan would occur in Year 2 (2016) for implementation in 2017 and beyond. The costs of the implementation of the Accommodation Plan itself would of course be an element of the study and cannot be estimated with any certainty at this time. Also, there is some possibility that by the time the Accommodation Study is underway, additional space possibilities (such as vacant schools or other buildings) may present themselves as accommodation options to be considered.

County-Wide Recognition Plan (CWRP): Strategic initiative #9 recommends the development of a County-Wide Recognition Plan to ensure that there is a high level of awareness of the existence of the BCM&CC, and ideally to instill a desire to visit it and participate in programs on the part of residents from across the County. While marketing and other senior staff at the Museum may have the expertise required to develop such a plan, we have perhaps more conservatively assumed that outside expertise may be required for its development. The cost of development of the plan would likely be on the order of \$15,000 to \$25,000, and expertise should be retained through a tender process (where familiarity with and experience in the County would be key requirements of the selected resource). This would likely occur in Year 2 of the plan (2016).

Creation of Fundraising Strategy: Strategic initiative #10 is focused upon the need and opportunity for the BCM&CC to become more active in overall fundraising. The need for a development staff position has already been discussed, but a necessary companion initiative would be the creation of a fundraising plan as an essential complement to guide the activities of this individual. While it is possible that the fundraising resource person could by themselves develop a fundraising strategy (depending upon their seniority, contacts, experience, etc.) the more prudent course is to assume that the BCM&CC will want to retain fundraising expertise to assist with the development of the initiative. We anticipate that, if required, this would take place in the latter half of 2016 or possibly the early part of 2017. (The fundraising plan should be developed with the assistance and input of the individual retained as the Development Officer.) Costs for the development of the plan would likely range in the \$30,000 to \$50,000 range. (See the Appendix for a fuller discussion of what would be involved in the strategy itself.)

Appendix A – Community Survey Results

Appendix B – Benchmarking Results

(to come)

Appendix C – Charrette Presentation

(to come)

Appendix D – Fundraising Strategy

(to come)