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A FIVE YEAR PLAN

* as presented at the 1979 Annual Meeting 1980 - 1985

Jesse Besser Museum

Members of the Development Committee

Alpena, Michigan

Alan Walker, Chairman and Board Vice President
J. Austin Sobczak, Board Treasurer
Dennis K. Bosen, Museum Director
Ronald Thompson, Resource Person

This Five Year Plan is the culmination of many hours of staff discussions and comments by all Board members of the Museum's Development Committee, and review and Spring, 1980
Museum staff, coordinated the project and drafted the final report.
Ronald Thompson, Resource Person.

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* as elected at the June 20, 1979 Annual Meeting

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Dennis R. Bodem, Museum Director
Ronald Thompson, Resource Person

This Five Year Plan is the culmination of many hours of staff discussions and meetings, work sessions of the Museum's Development Committee, and review and comments by all Board members of the Jesse Besser Museum. Ronald Thompson, Museum Aide, coordinated the project and drafted the final report.

Purpose of the Plan

The five year plan provides the museum with a set of goals which can be made operational by management objectives and action plans for each individual year of the period covered. The plan includes financial projections, i.e., estimated revenues and expenditures for the period. Therefore, it can also be used to present the museum's goals and financial projections to funding sources for the purpose of receiving grants. The plan also facilitates evaluation of the museum's operations and programs.

Organization of the Plan

The plan is divided into the following sections:

- I. A statement of the purpose for the Museum.
- II. A list of the major goal categories.
- III. A narrative description of the goals.
- IV. A set of financial projections (revenues and expenditures) for the period 1980-1985.
- V. A summary of the plan.

I. PURPOSE OF THE MUSEUM

The purpose of the museum was set forth in two statements adopted by the museum's Board of Directors.

On September 28, 1970, the following statement was adopted, "The Jesse Besser Museum is a museum of history, science, and art serving Alpena and, the Thunder Bay Region. It is a living and learning museum for the purpose of preserving, studying, enhancing by various means, and, in particular of exhibiting to the public for its enjoyment and instruction, historical, scientific, artistic, and technological collections.

On December 15, 1977, the Board of Directors expanded the purpose of the museum by directing that educational programs be developed and that the museum be open on Saturdays to provide this education enrichment to Alpena school children.

These statements of mission have been used by the museum's staff to organize and develop its exhibitions, collections, and programs.

II. LIST OF THE MAJOR GOAL CATEGORIES

1. Financial support
2. Professional staff
3. Exhibitions
4. Collections and archives
5. Accessibility for the handicapped
6. Maintenance of the building

III. NARRATIVE DESCRIPTION OF THE GOALS

1. Financial Support

During the period of the five year plan the financial support of the museum will be in a crucial period of change because the museum's major funding source will limit its contribution.

For the fifteen year history of the museum, one source, the Jesse Besser Foundation, has been the major source of operating funds. Recently the Foundation notified the Board of Directors that the Foundation's support will decrease in 1979, and 1980, and then plateau in 1981.

This change in the traditional support has challenged the museum's staff to expand the museum's fund raising activities.

The fund raising activities being planned are:

- A. An ongoing grant program
- B. A major fund raising campaign
- C. An expanded gift shop
- D. Charging admission fees
- E. Receiving revenues from school districts for museum service rendered

A. Grant Program

The grant program will become stabilized and made ongoing only when a permanent professional staff member responsible for grants can be added to the staff. Potential funds from grants are vital for two reasons: these funds make up the deficits listed in the financial projections, and they provide for an increased portion of the operating budget.

Sources for grants include the Michigan Council for the Arts, the Michigan Council for the Humanities, the Alpena Area Community Foundation, the National Endowment for the Humanities, the Institute for Museum Services, the Department of Education, and the Department of Energy. The museum has been successful in receiving funds from many of these sources.

B. Fund Raising Campaign

A major fund raising campaign will be conducted in cooperation with a professional team of consultants. To enable the Museum to employ such a professional team, the museum has already applied for a Michigan Council for the Arts grant. When the anticipated grant is received, a local committee consisting of members of the Board of Directors and other influential members of the community, will assist the museum staff and the professional fund raising team.

The goal of the campaign will be to raise from \$400,000 - \$600,000. These funds will be invested and the interest will be used for museum general expenses.

The campaign will start in late 1980, or early 1981, pending receipt of the grant. Some of the total amount of the goal can be received from challenge grants established by the National Endowment for the Arts and the National Endowment for the Humanities. (The museum has been successful in a previous challenge grant program with the National Endowment for the Humanities.)

C. Gift Shop Expansion

An expanded gift shop which will sell art objects, craft objects, educational objects, and souvenirs probably will net the museum an increased source of revenues. As in starting any business, a start-up risk will be involved. The gift shop should be operated by a staff member and should be organized as a profit-making business organization under IRS regulations. (Alternative plans, discussed many times such 1976, with other individuals and organizations, have not developed.)

D. Admission Fees

The museum is currently exploring charging a specific admission fee for all visitors. (The museum now only suggests a donation from each visitor.) Such a fee would ask that the visitor share in the costs of operating the museum.

To prepare for such a fee, the museum will conduct a survey to question the public's reaction to such a fee. The target date for beginning the admission fee would be January 1, 1981.

E. Revenues from School Districts

The museum will attempt to enter into contractual agreements with local districts in payment for the museum's services.

2. Professional Staff

The staff of the museum has consisted of permanent-full time employees, temporary full time employees and various categories, both permanent and temporary part-time employees.

The temporary full time members usually have been federally funded CETA employees. Because CETA employees are limited to a specific time period and because CETA legislation is subject to economical and political changes, the museum's staff is constantly changing. Constant change of the staff has not allowed for long range planning, consistency of effort and responsibility for specific duties within the museum, and professional growth. Therefore, the factors responsible for causing the staff changes are termination of the CETA agreements for the present staff members and the uncertain availability of funds through grants.

During the period of the five year plan, the museum must attempt to stabilize and augment its professional staff by transforming present CETA positions into permanent positions.

To accomplish these staff changes, new sources of revenue must be developed to pay for wages, salaries, fringe benefits and necessary equipment. One source of new revenue is through grants. For example, if, in 1980, a Michigan Council for the Arts grant and an Institute Museum Services operational grant are received, the arts coordinator position, the educational aide position, and the museum aide position can be transformed from temporary status to permanent positions for the duration of the grant funding period. If these grants are not received, the art coordinator's position will be discontinued and the other positions will either end or continue as CETA positions. At present, however, this does not seem likely.

In 1983-84 a part time (20 hrs./week) archivist is to be added as a permanent staff member. Revenue for the staff position would come from the grant program. This position may be staffed earlier if the CETA program is continued and if the right person could be employed under the present CETA guidelines. (Present CETA guidelines limit the pay scale to \$3.40 per hour and limit the number of hours worked. These guidelines make it difficult to find qualified employees.)

Other adjustments to the staff may be made if the museum and the Alpena Community College affiliate in July, 1980.

3. Exhibitions

The museum staff has regularly sponsored temporary, rotating, and permanent exhibitions which have been of the very highest quality and have had educational, aesthetic and entertainment interest and value for the community. The museum board and staff believe that these exhibitions are a very important service to the community and constitute a major function of the museum according to the statement of purpose developed by the Board of Directors. Therefore, the museum board and staff firmly believe that the exhibitions' program must be continued at least at its present level. New sources of revenues must be found to maintain and to increase the exhibition schedule, because exhibition costs have increased.

Examples of financial sources for the exhibition schedule are the Michigan Council for the Humanities, the National Endowment for the Arts, the National Endowment for the Humanities, and most important, local contributions, private and industrial. The Michigan Council for the Arts is the major support.

Beginning with full support in 1979, the Founders Society of the Museum has been a major source of funds for exhibitions and must continue this support in the future. However, because the Founders Society depends upon membership dues for its financial support, it probably can not appreciably increase its support for exhibitions during the five year period.

Another problem which will be investigated during the period of the plan will be the potential decrease in the number of non-Northeastern Michigan residents and tourists coming to the museum. If there is a decrease, then the exhibition schedule might be changed to emphasize exhibitions of greater interest to the Northeastern Michigan residents on a full year basis.

4. Collections and Archives

The collections of the museum reflect the general purpose of the museum as stated in the mission statement adopted by the Board of Directors on September 28, 1970. The following cultural categories are mentioned in the mission statement and are reflected in the museum's collections: historical, scientific, artistic and technological.

The historical collections are Maps of the Great Lakes 17th - 19th century, photographs of early Alpena and Northeastern Michigan, decorative artifacts found and produced in Alpena in the 19th and 20th centuries.

The "Early Man" collection of Great Lakes Indian artifacts is the museum's most significant collection. The collection contains over 20,000 artifacts from the Paleo, Archaic and Woodland eras of the Great Lakes tribes.

The high point of the collection is rare, copper artifacts manufactured in the Alpena area from about 5000 B.C. to about 1500 B.C. The collection was assembled by and purchased from Mr. Gerald Haltiner and his son, Mr. Robert Haltiner of Alpena.

A large collection and exhibition of lumbering tools manifests the great importance of this trade to opening up and developing the Alpena area.

Other historical-technological collections include agricultural tools, a complete blacksmith shop with all of the tools intact, and wood milling tools from the 1870's to 1900.

New collections have been started in the copper glazed pottery of Walter Clewell of Ohio and in Indian baskets.

Concerning the artistic collections, graphic arts from late 19th and 20th century American and European artists are acquired for its permanent collections. Particular collecting emphasis is given to those artists who developed new concepts and ideas. The collection, the only major public one in northern Michigan, is to have representative examples for study as well as exhibit.

The major graphic media lithography, silkscreen, etching, woodcut, and photographs are represented in the collection of 235 works.

European and Mexican artists represented in the collection are Alexchinsky, Dali, Picasso, Dufy, Marcoussis, Rivera, Appel, and Kollwitz.

American artists represented in the collection include Lyonel Feininger, John Sloan, Raphael Soyer, Leonard Baskin, Fritz Eichenberg, Lozowick, Armin Landeck, Josef Albers, Robert Rauschenberg, Robert Motherwell, Robert Indiana, Alexander Calder, Philip Pearlstein, R.C. Gorman, Peter Max, and Philip Evergood.

The collection was developed for the following reasons:

1. Graphic art is more financially feasible for a smaller museum with a limited budget.
2. The collection is used to provide a continuous number of regular exhibitions.
3. One goal of the collection is to represent the major styles and art movements of late 19th and 20th century American Graphic Art with as many prominent American artists represented as possible.
4. Another goal is to compare the contrast between American Graphic Art movement and artists with European Graphic Art movements and artists.
5. The collection is a major resource of man's artistic achievements in a community geographically separated from urban cultural centers.

The staff is committed to increase the various categories of the collections during the five year plan.

Because of the availability of acquiring desirable artifacts, it is impossible to predict when wanted items may become available to the museum or at what the asking price might be. Therefore, the interpretative staff of the museum must constantly be aware of what is available on the market and at what price.

Acquisition of artifacts is accomplished by donation and purchase. The new sources of funds required to purchase artifacts will come from the grant program and the fund raising campaign of the museum. The Founders Society will also be asked to continue its generous policy of providing the funds to assist the museum staff in acquiring artifacts.

The storage areas (archives) for the museum's collections must also be improved during this period. Because of the increasing number of artifacts in the collections, new plans for using the present storage areas and more shelving will be necessary. Specialized shelving is needed for various categories of artifacts, e.g. paintings, prints, maps, baskets, etc.

In 1979 the Museum became the fourteenth Michigan Museum to be accredited by the American Association of Museums. This accredited status has resulted in increased recognition of the Museum and its collections. One opportunity now available is that the collection records of the museum may be computerized in cooperation with the Detroit Institute of Arts and other Michigan museums.

5. Accessibility for the Handicapped

It will be necessary to make the museum fully accessible to the handicapped as mandated by federal laws and regulations during the period of the plan. (These regulations, adopted by the U.S. Congress in 1973, are commonly referred to as the "504" Regulations.)

According to the time schedule contained in the Federal Register of April 17, 1979, the museum must become architecturally accessible by May, 1982.

As required by the "504" mandates, the museum formed an advisory committee to survey the museum and to recommend needed architectural modifications. These recommendations are contained in a needs assessment survey instrument (published by the National Endowment for the Humanities) kept on file in the museum.

The architectural modifications needed to meet the accessibility standards are a ramp, an elevator or a wheel chair lift, tactile informational signs and modification of the restrooms and drinking foundations. Costs of the architectural modifications vary from \$20,000 - \$100,000 - depending whether or not an elevator or a wheel chair lift is installed.

Funds for these architectural modifications will come from various sources, e.g. local service organizations are interested in helping construct the ramp; and purchase the tactile signs. The state of Michigan may be asked to provide funds for the elevator; private foundations may be asked to provide funds for the wheel chair lift.

6. Maintenance of the Building

The Jesse Besser Museum was built in 1965/66 and has been maintained and kept in good condition by the museum staff. However, changes will be necessary over the next five years because of normal usage and structural aging. Additionally, some changes are needed for energy conservation purposes.

The major building conditions which must be attended to are:

1. Venting of the space immediately beneath the roof to relieve moisture accumulating in the insulation and to allow for increased air circulation.
2. Repairing the concrete walkways and steps, and rebuilding the loading dock on the west side of the building.

3. Permanently closing the windows which now have temporary covers.
4. Installing an advanced electronic alarm system.
5. Enclosing both the north and south porticos to conserve energy.

Because of the current high rate of inflation, the museum will wait for construction estimates until the various projects are started.

Target dates are as follows:

1. 1981 - - windows and porticos enclosure
2. 1982 - - new alarm system
3. 1982-1983 - - west side loading dock

It is anticipated that the costs of these maintenance projects will come from revenues raised through a fund raising campaign, and from Besser Foundation funds.

The cost of energy is taking a larger share of the museum's budget each year. During this time period the museum will explore the possibility of using alternate energy sources, e.g. solar and wind to supply some of its energy needs. Another purpose of these alternate energy sources would be for exhibition-demonstration. Funding for these energy sources will come from Department of Energy grants, private foundation grants, state grants and private contributions.

IV. SUMMARY

The purpose of the five year plan is to give the museum a statement of direction for the period 1980 - 1985. The plan was written to be as flexible as possible and hopefully will be revised from time to time.

The plan is organized into the following sections: purpose of the museum, list of the major goal categories, narrative description of the goals and financial projections.

The plan uses the statement of mission adopted by the museum's Board of Directors on September 28, 1970, as a guide to formulating the major goal categories.

The major goal categories are financial support, professional staff, exhibitions, collections and archives, accessibility for the handicapped and maintenance of the building.

During the five year period of the plan, the professional staff of the museum will become more stable by converting temporary-full time positions (funded by CETA) to permanent full time positions. Positions involved will be the museum's aide position, the art educational coordinator's position and the educational aide position. The museum will also add a part-time archivist-conservator position to the staff.

During the five year period of the plan, the museum will continue and expand its present policy of sponsoring high quality rotating exhibitions.

During the five year period of the plan, the museum will increase its major collections by increasing the amount of funds available for artifact purchases.

Space used for storage of the museum's collections will be increased by purchasing new shelves, and by reorganizing the archive rooms.

During the five year period of the plan, the museum, as required by federal "504" mandates, will become fully accessible to the handicapped by constructing a ramp, installing an elevator or wheel chair lift, and modifying restrooms and drinking fountains. These modifications and additions must be completed by May, 1982.

During the five year period of the plan, the museum will complete the following structural changes or repairs; vent the roof to relieve the moisture accumulating in the insulation; repair the concrete walkway, steps, and loading dock on the west side of the building; replace several windows; replace the present alarm system; and enclose the north and south porticos.

The museum will also attempt to install alternate energy sources, e.g. solar and wind devices to conserve energy and for exhibition purposes.

During the five year period of the plan, the museum must find new sources of revenue for its "normal" operational budget and also to finance the activities mentioned as goals in this narrative.

Also during this period, it is anticipated that the museum's major source of funds, the Jesse Besser Foundation, will decrease and then level off its financial support and CETA funds will no longer be available for personnel.

Sources of these revenues are: a continuing grant program, a major fund raising campaign, an enlarged gift shop, new admissions fees, and a contract with local school districts for services rendered.

The plan includes financial projections, revenues and expenditures, for the five year period.

REVENUES (proposed)

Category	1979	1980	1981	1982	1983	1984
Besser Foundation	132,000	120,000	108,000	108,000	108,000	108,000
CETA & Work Study	48,190	38,699	15,209	16,284	17,424	18,644
Founders Society	2,000	3,000	3,250	3,500	3,750	4,000
Business Contribution	5,000	5,000	6,000	8,000	10,000	10,000
Private Contribution	350	850	1,500	2,000	2,500	3,000
Fees (Planetarium, Class)	2,225	3,600	3,700	3,800	3,900	4,000
Fees (Admissions)	0	0	9,500	9,500	9,700	10,000
Fund Raising Campaign	0	0	25,000	35,000	45,000	60,000
Sales, Gift Shop	0	0	2,000	4,000	8,000	10,000
Proposed contract with Alpena Schools	0	0	2,000	2,000	2,000	2,000
Grant Program	7,832	22,000	63,924	57,131	64,032	63,109
TOTAL	197,587	193,149	240,083	249,215	274,306	292,753

EXPENDITURES (proposed)

Category	1979	1980	1981	1982	1983	1984
Wages & Salaries	99,095	113,428	130,352	139,486	156,500	166,839
Fringe Benefits	14,756	14,449	16,276	17,903	19,436	20,404
Staff Development	3,550	2,775	3,191	3,669	4,219	4,851
Communication & PR	6,800	6,150	6,457	6,908	7,253	7,615
Administrative Costs	5,625	4,800	4,800	5,280	5,808	6,388
Maintenance	19,270	10,620	13,682	13,434	14,105	14,810
Energy Costs	20,075	20,200	24,240	26,664	29,330	32,263
Exhibit & Preserv.	8,875	8,275	15,268	16,102	16,910	17,782
Collections	11,000	6,000	11,720	12,320	12,909	13,539
Miscellaneous	5,050	3,250	3,575	3,575	3,575	3,575
Program	1,500	3,202	3,522	3,874	4,261	4,687
Special Projects			7,000 (fund raising)			
TOTAL	197,597	193,149	240,083	249,215	274,306	292,753

BALANCE

	1979	1980	1981	1982	1983	1984
Expenditures	197,597	193,149	240,083	249,215	274,306	292,753
Revenues except for Grants	197,597	193,149	176,159	192,084	210,274	229,644
Deficit	0	0	63,924	57,131	64,032	63,109