

Jesse Besser Museum

STRATEGIC PLANNING

OPERATIONAL VS STRATEGIC PLANNING

Operational planning is determining how to run the museum effectively and efficiently in the short term. Operational planning sets in motion projects for the present and near future, usually 1 to 2 years that need to be in alignment with strategies established in long-term strategic planning.

Strategic planning is a process of analyzing the museum's strengths and weaknesses, and discussing coming threats and opportunities. It is an opportunity to revisit the museum's mission, vision and values. From this process, the Board of Trustees, the Executive Director, the staff and volunteers identify key issues facing the museum which will provide the basis to put objectives in priority and to devise strategies to guide museum operations over a long period (5 to 10 years).

Since 1974, the governing board and director of the Jesse Besser Museum have prepared multi-year plans that combined strategic and operational planning. The earliest were a series of five- to two-year plans that sought to analyze the museum's income and activities and to develop goals and objectives for the upcoming period.

SUMMARY OF MUSEUM PLANS, 1974 - 1994

Five Year Plan, 1974-1980

The Board of Directors approved a five-year plan in 1974 that was primarily concerned with internal improvements. Its purpose was to write and adopt administrative policies required for accreditation from the American Association of Museums.

Five Year Plan, 1980-1985

The museum's next plan was developed in spring 1980 after the museum was accredited. Adopted by the Board of Directors in June 1980, its purpose was "to give the museum a statement of direction for the period 1980 - 1985." It was an optimistic plan buoyed by many available state grants and federal dollars. But a 1982 change in administration in Washington ended almost all federal assistance, and the economy in the museum's service area collapsed. Even so, the museum scaled back its ambitions and many of its projects were nevertheless completed. The plan and a subsequent 1981 review of the plan by John L. Walters are included in Appendix A.

Five Year Plan, 1985 - 1989

This plan's emphasis was on building repairs, completion of existing programs, replacement of worn equipment and the restoration of staff positions that were lost due to state and federal budget cutbacks. A draft of this plan is included in Appendix B.

After 1989 the museum periodically revised goals and objectives. The last plan recorded was for the period 1992 - 94.

STRATEGIC PLANNING, 1999-2000

In February 1999 a new Executive Director joined the museum with considerable experience in strategic planning. She reviewed the Jesse Besser Museum's position and concluded that there was a **need for immediate planning and swift implementation to keep the museum operational** since it was threatened by a failure in its HVAC (heating, ventilation and air-conditioning) systems, a non-professional staff and an inexperienced governing board. There was no time to spend a year in traditional strategic planning activities that involved deliberate analyses of strengths, weaknesses, opportunities and threats. Immediate action was needed for the museum to survive. The director presented a short-term strategic operational plan to the Board of Directors that consisted of three primary goals, objectives within the goals, and implementation strategies. The Board unanimously approved the plan on March 3, 1999 and implementation proceeded over the next 22 months.

Jesse Besser Museum
GOALS, OBJECTIVES AND IMPLEMENTATION STRATEGIES FOR 2000

Adopted by the Board of Directors, March 3, 1999

GOAL # 1: To increase the financial base for museum operations.

OBJECTIVES	IMPLEMENTATION STRATEGIES
1. Establish a Board Development Committee to assist in preparing a development plan.	1. Board President makes appointments. 2. Establish plan of two fundraisers a year in addition to the annual fund drive. Suggestions: Past Treasures Sale, Appraisalthon, Raffle, etc. 3. Redefine and expand membership categories to include non-elected individuals and families. (Bylaws) 4. Plan and implement a membership drive. (Quarter Club) 5. *Install charge card service
2. Diversify revenue sources.	1. Sell unique items related to the museum's mission at the front desk. 2. Increase number of educational programs. 3. Establish and promote site rental policy.
3. Increase funding from local corporations and businesses.	1. Create corporate and business membership categories with appropriate benefits. 2. Establish reciprocal relationships. Ex. Lafarge. 3. Invite high level corporate administrators to join museum board.
4. Increase the number of grant applications to foundations	1. Executive Director and staff match museum's needs with Foundations' interests and prepare appropriate applications.

GOAL # 2: To earn subsequent accreditation by the American Association of Museums (AAM)

OBJECTIVE	IMPLEMENTATION STRATEGIES
1. Raise professional standards for the museum's operations.	1. Board creates Collections Management Committee. 2. Executive Director initiates standards with staff. 3. Staff/Board conduct self-study process. 4. Staff/Board update Collections Management policy. 5. Staff/Board develop Code of Ethics. 6. Staff develops Disaster Preparedness Plan and improves security procedures. 7. Staff/Board update Employee's Handbook. Board adds Retirement Plan. 8.*Establish an education/exhibits department. 9.*Director and Board Treasurer tighten up business procedures. 10*Improve museum's environmental controls with new HVAC system.

GOAL # 3: To communicate the importance of the Jesse Besser Museum's educational and cultural mission by integrating its services into the community to meet public needs.

OBJECTIVES	IMPLEMENTATION STRATEGIES
1. Revitalize the museum's image as a user-friendly, responsive, educational facility.	<ol style="list-style-type: none"> 1. Revise the mission statement to include "serve the community" and "educational institution", and shorten the statement for public use. 2. Develop a new, more dynamic logo that communicates the museum's fields of Art, History and Science. 3. Revise and update the By-laws to replace a corporate image with one of service. <ol style="list-style-type: none"> A. Change "Board of Directors" to "Board of Trustees". B. Change "Directors" to "Trustees". 4. Refurbish lobby and other public museum areas.
2. Strengthen communication between the museum and the community.	<ol style="list-style-type: none"> 1. *Secure computer capability for collections management. Expand telephone system and Web Site. 2. Executive Director visits community organizations, service clubs, local and regional media, and local and state government officials. 3. Board Members introduce Executive Director to community leaders and potential funders, promote the museum at social, community and political functions, and attend museum functions.
3. Increase the quantity and diversity of educational offerings to schools and the community.	<ol style="list-style-type: none"> 1. *Hire a full-time educator to develop and implement programs with the aid of docents. 2. *Refurbish planetarium: install newer seats and a new carpet. 3. *Install charge card service. 4. Expand docent organization and strengthen its link to staff.
4. Attract new audiences to the museum.	<ol style="list-style-type: none"> 1. *Produce and distribute professional Museum Brochure. 2. *Insure that museum is "barrier-free" to persons with disabilities (elevator, restrooms, etc.) 3. Establish and advertise comprehensive site rental policy. 4. Incorporate interactive activities for young people in the exhibit galleries. 5. Diversify temporary and permanent exhibitions. 6. Recruit more volunteers.
5. Begin a long-range strategic planning process by the end of 1999.	<ol style="list-style-type: none"> 1. Create 8-10 member core committee comprised of Exec. Dir., 3-4 Board members, 1-2 staff, and representatives from Founder's Society, volunteers, and community stakeholders. 2. Create a vision statement for the next 10 years. 3. Collect data on museum's strengths & weaknesses, community profile, and demographic & economic trends. 4. Create a 5-year plan for the museum with objectives and implementation strategies.

* Requires additional funding.

To achieve **key objectives**, it was necessary for the Board to begin changing some basic governing and administrative policies. The next 22 months, under the leadership of the Executive Director and Board Presidents Lynn Wilson and Mary Ellen Glawe, was a period of introspection, examination and discussion on “who we (the museum) are” and “what we should be doing”

KEY RESULTS: Of the 10 objectives listed in the March 3, 1999 Strategic Goals, Objectives, and Implementation Strategies, 6 were met in 22 months. Progress was made with the Board enacting these significant policies:

September 27, 1999

1. The full Board of Directors decided to start holding **monthly meetings** instead of quarterly to achieve the museum’s goals. Decision-making was therefore transferred from the Executive Committee to the full board, although the Executive Committee would continue to meet.

2. The Board established a **board-directed endowment fund** at the Community Foundation for Northeast Michigan.

November 3, 1999

Board adopted a **new logo** for the museum.

January 5, 2000

Board committees for Collections Management, Development, Education, Finance and Nominating were approved.

February 2, 2000

Board began long-term **capital improvements campaign**.

March 2000

Signed contract with general contractor to **begin work on HVAC replacement project**.

April 5, 2000

The Board adopted a **revised mission statement**:

The Jesse Besser Museum is an educational institution dedicated to serving the public of all ages and abilities in art, history and science. Through research, it collects, preserves and interprets artifacts, specimens and information concerning fifteen counties in Northeast Michigan. Through programs and exhibits, it promotes understanding and appreciation of the past and present.

May, 2000

The Board created a **by-laws committee** to begin revisions.

August 2, 2000

The Board voted to **increase museum admission** rates, and to create a free hours period from 3 to 5 pm on Wednesdays.

October 4, 2000

1. Board unanimously approved a **new job description for the Executive Director** that gave the director full authority to operate the museum, and clarified the roles of the director and the board.

2. The Board also unanimously approved **changing their name from “Board of Directors” to “Board of Trustees.”** to demonstrate their role of stewardship over the museum’s policies and affairs. It is the job of the Executive Director to direct.

MASTER FACILITY PLAN 1999

In the years approaching 1999, the museum experienced increasingly problems with its environmental control systems. In 1998 the Besser Foundation provided funding to retain the services of Peter Basso Associates, Inc. to study the existing heating, ventilating and air conditioning (HVAC) systems associated with the museum. The purpose was to determine the adequacy and condition of the existing HVAC system presently serving the facility and to recommend improvements where appropriate for a mechanical engineering study of the environmental control systems and Peter Basso Associates in Troy, Michigan were hired to do the study. PBA Project No. 98089 was completed in May 1999.

The results of the study stated that "the museum's HVAC system has been found to be unable to maintain stable and uniform temperature and humidity conditions within the facility. In addition it does not satisfy current ASHRAE Standard 62-1989 for indoor air quality requirements."

The report submitted a plan of modifications "to bring the environmental control systems in line with the current day-today functions and current indoor air quality standards, provide environmental conditions adequate for the protection of the valuable collections and for the comfort of the occupants, and to improve the reliability of the HVAC equipment."

As the board of Trustees and staff pondered the report, time ran out in July 1999 when an irreversible breakdown occurred in the museum's air conditioning and humidity control systems. The museum lost its ability to control temperature and humidity, which jeopardized its irreplaceable arts, anthropology and history collections. There was no time to plan and the Board of Trustees had to choose between closing the museum because it could not safeguard its valuable collections, or mounting a capital campaign to raise over \$2 million to completely replace the systems. It chose the latter, and on October 12, 1999, the board signed a contract with Peter Basso Associates to design a phased **plan to completely replace the museums heating, ventilation, and air conditioning systems** and *de facto* committed to a capital campaign. Lucas Pfeifferberger joined the Board of Trustees in January 2000 and assumed the role of Development Coordinator for the capital campaign.

In the next 1½ years, the museum raised \$1.3 million and by June 2002 it had completed the first 3 phases of its long-range project. Phases 1 and 2 replaced the chillers, ventilation system and boilers. Phase 3 added an elevator and two barrier-free rest rooms, replaced the roof, insulated some exterior concrete walls and added vapor barriers, and renovated office and public reception areas, and a temporary exhibition gallery.

As the museum entered the first phase of the HVAC project, it was apparent that the scope would involve extensive work throughout the museum. This presented an opportunity to plan structural renovations to coincide with the required mechanical changes. The Executive Director received funding from the Besser Foundation to hire William A. Frederick, Jr., AIA, of Jickling Lyman Powell Associates in Troy, MI to work with staff and board members to create a long-range master facility plan.

The initial planning committee included

Jan McLean, Executive Director
Janet Smoak, Collections Manager
Robert Haltiner, Curator
Bill Frederick, Architect

The committee presented the plan to the Board of Trustees on September 6, 2000, and on *November 1, 2000* the Board approved in concept the Master Facility Plan with the understanding that specific details

of the plan would be worked out as the plan progressed. The plan integrated major museum modifications including making the museum ADA accessible with the HVAC project.

The present planning committee includes
Jan McLean, Executive Director
Janet Smoak, Collections Manager
Richard Clute, Curator of Anthropology
Sharon Powers, Board of Trustees

This committee reports to the Facilities Committee of the Board of Trustees
Jon Hopkins
Lucas Pfeiffenberger
Andy Butt, Chair
Tom Rea
Bill Harris
Bob Adomeit, designer

The approved plan is in Appendix C.

STRATEGIC PLANNING 2001

The Executive Director and the new president of the Board of Trustees Lucas Pfeiffenberger developed a new short-term strategic/operational plan. It was adopted by the full board on January 2, 2001.

This plan incorporated elements of the 1999-2000 plan that had not yet been accomplished and it established new priorities, objectives and strategies for implementation. Its emphasis was on preparing the museum for subsequent accreditation, expanding museum outreach to all 15 counties included in the museum's mission, and continuing to improve the museum's governance structure.

Jesse Besser Museum
GOALS, OBJECTIVES AND IMPLEMENTATION STRATEGIES FOR 2001

Adopted by the Board of Trustees January 2, 2001

GOAL # 1: To earn subsequent accreditation by the American Association of Museums (AAM). Application materials due to AAM by August 1, 2001.

OBJECTIVE	IMPLEMENTATION STRATEGIES
1. Staff/Board conduct self-study process	<ul style="list-style-type: none"> • Follow AAM Guidelines and forms. Board President works with Board, • Executive Director works with staff. (Goal, May 2001)
2. Update Employees' Handbook	<ul style="list-style-type: none"> • Executive Director submits draft to Board for evaluation and approval. • Include Retirement Plan for staff. (Goal, February 2001)
3. Update Collections Management policy	<ul style="list-style-type: none"> • Collections' Manager and Executive Director prepare draft for Collections Committee. • Committee and Director present to full Board for approval. (Goal, March 2001)
4. Develop Code of Ethics	<ul style="list-style-type: none"> • Executive Director prepares draft for Board review and approval (Goal, April 2001)
5. Develop Disaster Preparedness Plan and Emergency Procedures.	<ul style="list-style-type: none"> • Maintenance Manager, Collections Manager and Executive Director develop Plan. No need for Board approval. (Goal, March 2001)
6. Develop Strategic Plan. Begin a long-range strategic planning process by mid 2001.	<ul style="list-style-type: none"> • Create 8-10 member core committee comprised of Exec. Dir., 3-4 Board members, 1-2 staff, and representatives from Founder's Society, volunteers, and community. • Create vision statement for the next 10 years. • Collect data on museum's strengths & weaknesses, community profile, demographic & economic trends. • Create a 5-year plan for the museum with objectives and implementation strategies. Include new space plan. (Goal, June 2001)
7. Improve visitor services	<ul style="list-style-type: none"> • Build elevator and barrier-free restrooms • Create plan for improved parking, relocate closer to main entrance (Goal, Fall 2001)
8. Hire Curator	<ul style="list-style-type: none"> • Exec. Director develops job description, advertises, interviews and hires (Goal, summer 2001)
9. Strengthen Educational Program	<ul style="list-style-type: none"> • Create plan to hire a full-time educator • Enlarge Education Committee • Improve Docent Training Program and recruit more Docents • Upgrade and rewrite exhibit labels, enrich intellectual presentation • Improve educational content of exhibitions.

10. Revise By-laws	• Committee of Board/Exec. Director formed to do this. (Goal, summer 2001)
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GOAL # 2: Increase the financial base for museum operations.

OBJECTIVES	IMPLEMENTATION STRATEGIES
1. Change museum governance from corporate board to community-based membership	<ul style="list-style-type: none"> • Change By-laws • Create and define membership categories, dovetail into Quarter Club, include businesses and corporate • Plan and implement a membership drive. • Add membership responsibilities to staff
2. Diversify revenue sources.	<ul style="list-style-type: none"> • Sell unique items related to the museum's mission at the front desk. • Increase number of educational programs. • Establish and promote site rental policy.
3. Create high-profile Fundraiser events.	<ul style="list-style-type: none"> • Increase Board involvement in fundraising. • Increase size and activities of Development Committee. Add non-board members to it. Develop fundraising plan by Feb. 2001. Run Croesus Venture Goin' Fishin' More craft/art sales Annual Fund Drive Others • Encourage Founders Society to do more fundraising for museum; put Founders' Society members on Development Committee.

GOAL 3: Strengthen Museum's marketing services in the community to attract new audiences

OBJECTIVES	IMPLEMENTATION STRATEGIES
1. Develop color brochure to advertise museum	<ul style="list-style-type: none"> • Board Graphic Artist creates design, staff creates copy. • Find a photographer to take professional-level photos of museum
2. Develop promotional video	<ul style="list-style-type: none"> • Secure funding • Hire videographer • Select script writer
3. Serve as host museum for new, northeast museums association	<ul style="list-style-type: none"> • Expand 15 counties Committee • Develop program and host other museums at initial meeting

KEY RESULTS: The museum realized 13 of the 16 objectives in a 14-month period with the following board actions.

February 1, 2001

1. Policy for Disaster Preparedness

The Board of Trustees of the Jesse Besser Museum is concerned about protecting human life, preserving the Museum's valuable collections, and guarding its buildings in the event of a disaster. The Board affirms that it is Museum policy to develop and test a disaster preparedness plan, and supports the efforts of the Executive Director and staff to produce a plan to enable the Museum to mitigate, prepare for, respond to, and recover from, disasters.

2. Personnel Policies

The Board of Trustees adopted new Personnel Policies for the Jesse Besser Museum as contained in the February 1, 2001 draft of the Employees' Handbook.

May 3, 2001

The board approved a **Code of Ethics** for the museum's trustees, staff and volunteers.

June 1, 2001

The museum published **A Directory of Museums and Historical Societies of Fifteen Counties in Northeast Michigan.**

June 7, 2001

1. The board adopted **new Bylaws** that changed the basic governance structure of the museum, by instituting a community-based membership system.
2. The board approved a **Collections Policies and Procedures Manual.**

April 18, 2002

The board approved a **Disaster Preparedness Plan.**

STRATEGIC PLANNING 2003-2013

In October 2001, the Board of Trustees under the leadership of its new president Jon Hopkins began “planning the next strategic plan”. Unlike the previous two short-term plans that had to be drawn and enacted quickly to save the museum from closing, this planning process will take 20 months to complete. Upon its completion in June 2003, it will be presented to the full Board of Trustees for adoption.

The process began with recruiting community leadership to participate as advisors on a Strategic Planning Advisory Team (SPAT), and preparing a strategic planning process that will determine priorities and strategies for the museum’s next decade. The plan is co-led by the President of the Board of Trustees Jon Hopkins and the Executive Director Jan McLean.

COMPOSITION OF THE STRATEGIC PLANNING ADVISORY TEAM (SPAT)

The 12-person Board of Trustees is the overall policy-setting body for the museum and has final decision-making authority. A principal responsibility of the board is to oversee and support museum-wide strategic planning. Four board members serve on the 17-member SPAT.

Board of Trustees

Jon Hopkins, President (co-chair)
Lucas Pfeiffenberger, Vice President
Leona Wisniewski
Robert Lyngos

Museum Staff

Janice V. McLean, Executive Director (co-chair)
Janet Smoak, Collections Manager
Richard Clute, Curator of Anthropology

Founders Society

Billi Murch, Vice President

Business Community

Jerome W. Tracey, Vice President, Commercial Services, First Federal Bank of Northern Michigan
Rick Parr, President, Michigan Confidential Document Destruction
William P. Harris, retired businessman and diplomat
Richard McElroy, Director, Alpena Area Chamber of Commerce

Education

Thomas Lanway, Superintendent, Alpena-Montmorency-Alcona Educational Service District
Jane Guyott, Director of Instruction, Alpena Public Schools

Government

Greg Sundin, City Planner, City of Alpena
Beach Hall, Mayor, Rogers City
Leonard T. Zolnierrek, Chairman of the Board, Alpena County Board of Commissioners

The SPAT brings diverse expertise and reflects the museum's commitment to education. Other trustees, staff and outside experts will be invited to take part at various stages in the process, and the full Board of Trustees will monitor the process through monthly updates from the Board president.

PROCESS DESIGN

The museum has adapted its strategic planning process from those undergone by The Cleveland Museum of Natural History (1995) conducted by QM2, and the San Diego Natural History Museum (2001) conducted by Strategies & Teams, Inc.

It is drawing upon the experience of both new and long-term trustees, senior staff members and museum volunteers, and is augmented by individuals from the business and educational community at large who are new to the museum's planning processes. The process will develop a database upon which decisions about priorities, objectives, strategies and action plans can later be based. Trustees and staff will collect data.

Parts of the Strategic Planning Process were completed over the last 3 years as components of short-term strategic operational plans: a new mission statement, revised Bylaws, improved administrative procedures and governance, establishing a museum membership program, and others.

The present process is focusing on a vision for the next 10 years, full internal Strengths & Weaknesses, and external Opportunities & Threats (SWOT) analyses, economic and demographic forecasts, present and future target audiences (constituencies), role of technology, present organizational structure of board and staff, our niche and culture in the community, and funding challenges.

The first part of the plan will be to revisit our mission and purpose, determine our present position, niche, values and culture and examine our organizational structure. We'll review our programs and operations looking for trends, and develop a vision for the future. We'll identify critical factors for success in fulfilling our mission and identify our main internal strengths and weaknesses.

The next step will be to define our primary constituencies and target audiences. Who are they? What do we know of them? What perceptions and expectations do they hold? What are the factors that determine their ongoing interest? How will we best serve our audiences and what new technologies exist to help us?

Another step in our planning will be to make critical assumptions about forces in the external environment that will likely have the most significant impacts on the museum over the next decade. These include population trends, competitors, economic changes, and funding resources. As part of this, we'll look at our principal competitors and assess other factors such as available free time of our public, general economic conditions, governmental rules and regulations and other conditions that could affect our plans. We'll identify our competitive advantages and disadvantages, as well as our main external opportunities and threats. These assumptions will form the basis for forecasting museum opportunities in the next decade.

Armed with this information, we will decide where we want to go and how we're going to get there. We'll identify potential partners to leverage our resources, determine our principal priorities for action, decide upon specific measurable objectives and establish a timeline to complete them. .

We are trying to imagine the museum of 2013 and to plan the steps necessary between now and then to make that vision a reality. In short, we are trying to create our future.

Throughout the process, all interested parties, including museum visitors, members, trustees, staff, and the Founders Society are invited to make suggestions. They will be asked for their opinions, thoughts and ideas through surveys and brainstorming sessions, and they will be given opportunities to respond to ideas as the plan develops.

The plan that will be developed from the process is intended as a road map to the future. It will not preclude new ideas or even changes along the way. Progress will be measured annually by the board and staff and revisions and additions are expected.

DEFINITIONS OF PLANNING TERMS

Action Plan

This is a step-by step layout of what has to be done to implement a strategy. It identifies who will be responsible for taking each individual step and establishes when each step should start and finish.

Cost/Benefit Analysis

An effort to estimate the costs that go with obtaining needed resources, and then matching those costs against the benefits that are anticipated from implementing the Action Plan involved.

Goal

Our destination. A major priority for the museum over the next 10 years. It is where we most need to do things that are new, better and different, to make our mission successful.

Mission

A comprehensive statement that defines the nature and purpose of the Jesse Besser Museum.

Objective

A measurable, specific, time-certain entity we set to accomplish a goal. This is like a destination marked on the map for a trip. It must be measurable so that we can determine what progress we are making along the way, and when we have reached the end.

Resources Requirements

This is spelling out the resources in people, money, material, equipment and others that will be needed to carry out an Action Plan to implement a strategy.

Strategy

This is the direction that we believe will best take us to an objective. It is the route we set out to follow to reach a destination on a map.

Values

Shared beliefs that energize action in a consistent manner. Principles that guide museum culture. Refer to the museum's *Code of Ethics*.

Vision

The clear and inspirational statement of the most desirable position for the Jesse Besser Museum to occupy at some future time. The ideal situation of the museum to fulfill its mission in the community it serves.

THE IMPORTANCE OF NICHE

Niche - a place or position particularly suitable to the organization occupying it. It is the role the organization plays in the community, its position in the culture. Defining the museum's niche is an important component of strategic planning.

In considering the concept of niche we will recognize that a museum is, well, a museum and all that implies. It is not an Art Center, Historical Society, Public Library, school or Nature Center. Yet it may incorporate aspects of these allied organizations to achieve its mission. The SPAT will define what the museum is, as well as what it is not so that its position in the community is clear.

THE IMPORTANCE OF CULTURE

Defining the museum's culture also is important in strategic planning. Culture is how we as a museum do things, the actual behaviors of board, staff and volunteers. It is the museum's personality and style, the way we operate, how we appear to the community at large. Culture is how we listen and talk to one another, how we behave at meetings, how we confront problems, how we reach decisions. For example, are we relaxed and open or are we uptight and secretive? How do we treat people of different color, religion, ethnicity, each other? As an organization, are we leaders or followers? Are we agile and adaptive or are we set in our ways and slow to modify as outside circumstances demand change?

We will examine our museum's culture during the strategic planning process as a start to understand the culture we have versus the one we want.

STRATEGIC PLANNING CALENDAR

October 2001 through April 2002. Plan the planning process.

May 10 2002	9:00 am 10:00 am	Staff - vision discussion Founders Society Board - vision discussion
May 14, 02	11:00 am	Collections Committee – vision discussion
May 16 02	11:00 am	Board of Trustees - vision discussion.
May 21 02	7:00 pm	SPAT Meeting # 1 <i>Where we are now and how we got here.</i> 1. Recap the museum’s progress since 1999. 2. Review the mission statement and vision the future museum. 3. Review the museum’s present position and niche. 4. What are the museum’s main internal strengths and weaknesses?
June – July 02		Membership survey - strengths/weaknesses, opportunities/threats, vision
June 14 02		Staff discussion - internal strengths and weaknesses Founders Society Board discussion - internal strengths and weaknesses
August 02		Visitor survey – strengths, weaknesses Non visitor survey
September 02		Staff discussion - external opportunities and threats Founders Society Board discussion - external opportunities and threats
September 10	6:30 pm	SPAT Meeting # 2. <i>Our primary constituencies.</i> 1. Results of vision discussions 2. Results of visitors’ survey 3. Results of members’ survey <i>Assumptions about the external environment</i> 1. Main external opportunities and threats 2. Demographic projections 3. Economic projections 4. Competition 5. Future constituencies

October 2002 – December 2003

Staff/Board task forces collect data

January 2003

SPAT Meeting # 3

Review data on projections

Where do we want to go and how are we going to get there together?

1. Set major goals
2. Establish objectives
3. Discuss cost/benefits of various strategies
4. Resource requirements and sources

February – May 03

Staff/Board draft Strategic Plan

May 03

SPAT MEETING # 4

Review draft of Strategic Plan

June 2003

Board of Trustees adopts Strategic Plan 2003-2013

VISIONING SESSIONS - NOTES

STAFF, May 10 2002 (J. McLean, Facilitator)

- Planetarium. Laser shows (lease cost approx. \$2,500/month)
 - Computer automation of projectors, planetarium instrument and other controls.
 - Additional carousel projectors and dissolve control units.
 - New cove lighting system. Upgraded sound system.
 - Retrofit all single shot slide projectors to allow use of available bulbs.
 - Upgraded video projection system with VHS, DVD and/or laser disk capabilities.
 - Enhanced show production capabilities (improved editing).
 - All dome video capabilities. Enhanced multi-projector deep, panoramic system.
 - Digistar planetarium projector.
- Premier museum in NE MI. Resource in art, history, science
- Integrate the inside and outside buildings better. Add more historic structures (Barn, farm animals, blacksmith shop...)
- Clear acquisitions policy to guide building the collections
- Expand collecting area to include all 15 counties
- Museum will be more representative through time—include history up to present
- State of the art building operations for visitors and collections
- Regular program of exhibit/collections rotation
- Make better use of interior space
- Increase exhibit space. Increase scope of exhibits within mission. Maritime history.
- Increase variety of exhibits within art, history, science
- Integrate the 3 disciplines better re exhibits
- Expand grounds to add more buildings, develop nature trail (botany, zoology, geology) and archaeological digs
- Landscape Katherine V area. Include ice house, lake.
- Make grounds more interesting—more things for visitors to do and learn
- Create a pleasurable learning experience with expansion of buildings, grounds, exhibits.
- Present a bright, friendly, interesting and changing image
- Will have a strong education program. More classes, all ages, higher academic level than library, more programs, exhibits for kids. Laser programs in planetarium. Classes for all ages in space sciences.
- Will have museum store to generate more earned revenue. Mission centered. Locally made objects.
 - Educational based toys/games. Affordable, related to exhibits. Reproduce exhibit objects for sale.
- Food available. To encourage longer visits. Keep simple.
- Technological parity with other museums. Maintain pace with current technology. Linked computers, data-based software, educational web page. Entire collection on accessible database with photos.
- Strong marketing skills to promote museum and draw visitors.
- Strong academic reputation in discipline areas. Research program in place. Students and scholars utilizing collections for research.
- What people will say about museum.
 - “Couldn’t see it all in 1 day (visit)”
 - “So much fun”
 - “I want to come back”
 - “I never know that...before”
 - “Such a variety”
 - “They have things I’ve never seen before”

FOUNDERS SOCIETY BOARD, May 10 2002 (J. McLean Facilitator; Rogg, Kolinski, Parker, Murch, J. Decker, G. Decker)

Emphasize quality in art
Expand art services and education
Expand village
Create costumed docent facilitators who stay in character identity
Host annual craft show outdoors
Develop children's discovery room
Expand size of museum
Show more art. Integrate it with history, science exhibits as done in Bustles to Bloomers
More thorough treatment of regional history. Make it contemporary. Bring it up to present. Hunting camps, snowmobiles, Amish
Offer musical concerts/programs
Expand scope of exhibits and events
Have museum store
Have simple food: Tea Room.

COLLECTIONS COMMITTEE, May 14 2002 (J. Smoak, Facilitator)

Interactive displays for children and adults. Include art works. Voice, image, sounds, computer
Visitors to museum – last year c 21,000
Goal in 10 years: 500 paid memberships, 60,000 visitors
21st century technology
Museum Shop
Talking mannequins depicting early man, native Americans, lumberman, schoolteacher, etc.
Create endowments: need \$10,000,000 from small and large donations. Notify public that endowment exists
Assertive marketing to generate income
Increase in professional staff
Add marketing/financial person
Publicity follow ups
School outreach to industry, schools, families – involves museum
Updated kits and information to the schools
A marketing budget
A good interactive web site and a professional person in charge

BOARD OF TRUSTEES, May 16 2002 (J. Hopkins, Facilitator; Bourdelais, Brandt, Butt, Mazur, Harris, Lyngos, Pfeifferberger, Powers, Wisniewski)

More interactive displays and exhibits e.g. touch screen displays
Period costumes for docents
More endowment income
1,000-1,500 memberships
All local students visit museum through school program
Successful museum store
Funds to maintain building on a regular basis
Regular maintenance of buildings and grounds

J. Hopkins

All docents in uniform dress (period costumes or even polo shirt with museum logo)
Larger pool of docents with many specializing in certain fields – all with more training
Child discovery area on back patio area
Outside village enlarged and open more days with docents in period dress
Larger staff
Parking lot in front of museum
More community involvement and interest in museum
Larger group of volunteers with more special events, e.g. Old Fashioned Days, April Fool's Party, etc.

Wisniewski

Sound, dependable source(s) of operational funds

More professional fulltime staff (education coordinator, development and marketing person)

Well maintained buildings and grounds

Visitors at the 50-60 thousand mark

Exhibits that are updated in eye appeal (canoe with backdrop of trees, water, etc.)

Hands-on exhibits for children, coordinated with the school curricula.

Incorporate technology into exhibits such as recorded story to go with the Street of Shops, Gallery of Early Man.

Tapes/players to rent for some changing exhibits.

Upgrade informational kits for use by schools, camps, etc.

Periodic talks for adults – lumbering era, early Alpena, of other cities in our 10 counties, fishing industry. Two or three Sundays; winter, spring.

Continuation of classes for children and adults in art, basket weaving, etc.

Gift shop.

Harris

Continue emphasis on education. You will have the space so pursue the audience and the staff required.

In addition to the type of exhibits that have been produced lately, I think the museum should endeavor to arrange more art exhibits which move from museum to museum. In the past there was more governmental support for this, so fundraising and increasing number of members will be needed to finance these.

The planetarium is certainly unique in this part of the world and we should increase the audience locally.

STRATEGIC PLANNING ADVISORY TEAM

MEETING # 1 May 20 2002

7:00 – 9:00 pm Founders Room

MISSION STATEMENT

The Jesse Besser Museum is an educational institution dedicated to serving the public of all ages and abilities in art, history and science.

Through research, it collects, preserves and interprets artifacts, specimens and information concerning fifteen counties in Northeast Michigan. Through programs and exhibits, it promotes understanding and appreciation of the past and present.

AGENDA

Facilitators: Jon Hopkins, President, Board of Trustees

Jan McLean, Executive Director

Recorder: Jan Hopkins

- | | |
|---|-------------|
| 1. Welcome and introduction to the JBM's Strategic Planning Process | Jon Hopkins |
| 2. Introductions | Jon Hopkins |
| 3. Planning history (handout) | Jan McLean |
| 4. Where we are now | Jan McLean |
| 5. Review museum's mission statement | Jon Hopkins |
| 6. Review the museum's present position and niche in the community
Team discussion | Jon Hopkins |
| 7. What are the museum's main internal strengths and weaknesses?
Team Discussion | Jon Hopkins |
| 8. Vision the museum in 2013
Team discussion (handout) | Jon Hopkins |
| 9. Set date for Meeting # 2, September 2002 | |

**Strategic Planning Advisory Team Meeting
Minutes, May 20, 2002**

Present: Janice McLean, Jon Hopkins, Bob Lyngos, Len Zolnierek, Bill Harris,
Lucas Pfeiffenberger, Billi Murch, Leona Wisniewski, Janet Smoak,
Dick McElroy, Jane Guyott, Rick Parr.

Jon Hopkins welcomed the group. Introductions were given by each member to show the different factions represented. Most of the members have gone through some type of strategic planning before.

Jan McLean presented the history of the museum's planning efforts, citing the handout. She emphasized that this museum is collections-based and had a newly revised mission statement.

Jon reviewed the mission statement and gave the museum's present position and niche in the community

Jon then opened the meeting to discussion on how the community presently perceives the museum. The main ideas brought up were:

- Chamber uses museum as part of recruitment package, so its is important to them
- 12 counties would be surprised to know that Alpena has a museum, even though the museum's mission is to serve 15 counties.
- uniqueness as a museum
- field trip destination (out buildings)
- important in history of region
- patchy marketing
- unknown to many locals
- sell museum to locals
- perception that the museum serves a certain group of interested members
- ask other counties to put in exhibits
- membership - reaching out
- outside of museum "looks like hell" (McElroy)
 - ugly sign
 - plain building – has not left the 50s – single dimension - lifeless facility
 - parking – needs covered, awning walkway
- In Alpena success is survival (small business) – survived since 1966 (Zolnierek)
- museum represents dead things
 - needs pulse inside – life + change + growth
- large building + small funds (not able to maintain)
 - (in the past, lights on/off – cold water)
- local citizens are entrenched in survival mode – common reaction to museum "I was there once"
- mind set in Alpena area - afraid of success
- large industrial class vs small working class
- museum should market to families
- electronic sign like college needed to liven up front entrance
- integral part of schools (Guyott)
 - curriculum + museum doesn't always match
- advantage of focus groups in assessment of museum's impact – ask neighborhood groups for information on how museum perceived
- "great" that someone started museum and recognized achievements of Jesse Besser
- the museum is a case of not being known, not a case of wanted/not wanted
- Besser name "blessing or curse"

Assumptions come with the name – rename galleries after others. Play up “Museum”, play down “Besser”

- promote and educate community
- develop a hands-on discovery center for families
- building has been stripped of many of its lights. This has taken away its uniqueness

Jan led the discussion on the museum’s perceived strengths and weaknesses:

Strengths

Important to region
recruiting tool for businesses
residents’ cultural opportunities
Interesting exhibits
Membership program is benchmark of progress
Improvement in staff professionalism and volunteer attitude
Important to schools
Broad instead of focused mission (art, history, science)
Besser name association

Weaknesses

Marketing
lack of sufficient
External appearance
lack of curb appeal, lights at night, interesting signs, landscaping
Funding, not enough
stronger donor base is needed to support qualified people (professional staff)
need to know how to ask for donations
effectiveness of peer appeal
1st educational point needs to be how to sell the idea that the museum is not supported by Besser Company or Besser Foundation
Importance of bequests – check with lawyers and money managers to develop a program (museum can be a choice in wills for donations)
Educational curriculum does not always match school needs
Inconvenient parking
Broad instead of focused mission (art, history and science)
Besser name association

Jon reminded the team to look over the vision statement for 2013 in the hand out. Jan said she would send out Visioning Forms to team members and ask that they be filled out and returned to her.

The next meeting was tentatively set for Tuesday, September 10, 2002.

Submitted by

Jan Hopkins, Recorder