



San Bernardino County Museum

## Strategic Plan 2017-2022

Prepared by: San Bernardino County Museum Staff  
and Community Members *with*  
Museum Management Consultants, Inc.



# TABLE OF CONTENTS

Foreword	1
Introduction	2
Vision 2022	3
Mission	5
Core Values	6
Goals	7
1 Develop and implement engaging visitor experiences	8
2 Focus, organize, and strategically steward the collection	15
3 Refresh and upgrade SBCM facilities	19
4 Increase visibility and awareness to grow visitation	22
5 Diversify sources of revenue to build financial sustainability	25
6 Enhance organizational capacity to fulfill the SBCM mission	29
Appendix: Strategic Plan Participants	31

# FOREWORD

---

This five year Strategic Plan is the culmination of months of work to position the San Bernardino County Museum for success and sustainability. Covering the period 2017-2022, this document was developed through a comprehensive process in collaboration with the County Board of Supervisors, Museum staff and other County agency leaders, along with a cross section of community members, Museum Association Board members, and business and education leaders. Leading the facilitation of this plan was Museum Management Consultants, an organization that has helped advance the Museum through an *Assessment* in 2014, and a *Bridge Plan* and Museum Director search in 2015.

The purpose of this concerted community process was to ensure that the mission, values, and vision of the Museum remain relevant to our county's residents. The result is an ambitious and exciting roadmap that is thoughtful and fiscally responsible.

The plan's path to realization is not without challenges. Building capacity and developing new exciting initiatives must be balanced with financial realities. In order to accomplish the goals presented in this plan, County Museum leadership must partner with our philanthropic community, and with other agencies and nonprofits. Through collaborative efforts, a more vibrant, and community responsive San Bernardino County Museum will emerge.

At the end of this document you will find a long list of individuals that contributed to this plan. Each with a unique and valuable perspective, they shared their aspirations for the Museum, helped to craft a mission statement for the 21<sup>st</sup> century, and laid out a strategic path that will transform our County Museum and carry it forward with great energy over the next five years and well into the future.

Robert A. Lovingood, Chairman  
San Bernardino County Board of Supervisors

# INTRODUCTION

---

This Strategic Plan is the result of a comprehensive process undertaken by the San Bernardino County Museum (SBCM) during 2016. Museum Management Consultants, Inc. (MMC) worked with the Museum staff, members of the San Bernardino County Museum Association, leadership from the County, and other community stakeholders to address priorities for the future.

MMC's process built upon the 2014 *Organizational Assessment* and 2015 *Bridge Plan*, both of which established the challenges and opportunities facing the organization. To begin the strategic planning process, MMC conducted confidential interviews with a representative sample of the Association Board, Museum and Association staff, and County leadership to learn about the Museum's recent accomplishments and thoughts about future directions. Following the interviews, MMC facilitated a visioning workshop and brainstorming sessions to discuss specific ideas in support of the future vision. (See Appendix for a list of participants.)

Institutional goals and objectives have been established as a result of the planning sessions. Goals emphasize presenting

an updated, exciting, and participatory visitor experience; clarifying the scope of the collections; upgrading the facilities; developing greater regional awareness of the Museum; ensuring long-term financial stability; and enhancing organizational effectiveness. Accountabilities, timelines, and proposed resources accompany each goal and will facilitate their realization by 2022.

This Strategic Plan is a living document and is intended as an ongoing guide to the work and decisions of the staff in collaboration with the County. As such, it will be important to track progress and update the goals and objectives as necessary to reflect internal changes at SBCM and in the external environment.

This Strategic Plan will strengthen the ability of SBCM to effectively serve a regional audience by building on past achievements and identifying areas for further work. The Plan also embraces the commitment of the organization to excellence in all aspects of the operation and activities, and strategically positions SBCM to thrive in the coming years.

Adrienne Horn, President  
Museum Management Consultants, Inc.

# VISION 2022

---

Over the past 65 years, the San Bernardino County Museum has been a cherished cultural and science education resource. This vast cabinet of curiosities – birds, eggs, fossils, taxidermied mammals, historical artifacts, a collection that has grown to over 3 million – has been a wonderment for generations of residents, and a treasure for researchers since 1954.

This Strategic Plan was developed with the input and collaborative participation of Museum professional staff and volunteers, County representatives, business leaders, educators, Museum members, and Museum Association Board members, all of whom deeply appreciate the Museum’s legacy, built with tireless effort over decades. Despite their nostalgic affection for the Museum’s past, their support for bold change was loud and clear, and obliges the Museum to sharpen its visitor engagement strategies and interpretative focus on the unique artifacts and extraordinary moments that tell the ongoing story of San Bernardino County’s 20,105 square miles.

As we envision our Museum’s future, we must recognize that the rapid and growing intrusion of technology in daily life has

been a significant disrupter for the traditional museum. In 2017, our Museum enters an era in which an entire generation of our children have grown up in the 21<sup>st</sup> century, the oldest in this age group having been born in 2000, 40 years after the invention of the first computer game. This generation’s fluency with technology and their facility to customize and share their personal experience is unprecedented and has radically redefined how this younger audience chooses to engage with the Museum’s history, art, and science exhibits.

We are energized by this shift in expectations, because it compels us to create more immersive and relevant exhibits and programs. Static displays of artifacts are being replaced by exhibits that invite visitors to share, engage, create, and contribute. A community that participates in the creation of its own museum experience is a community that will be more interested and invested in its own heritage. Engaging our community in our region’s environment, people, arts, and industry will be the heart of our work in the coming years.

As demonstrated in our new mission and values statement and the plan that follows, we have tremendous work ahead

of us in visitor engagement, awareness and accessibility, collections management, financial sustainability, resource development, and capacity building. As responsible stewards of this cultural resource, we are committed to preserve and enhance the Museum and its collections, and to bequeath this remarkable legacy to the future generations of San Bernardino County.

Melissa Russo, Director  
San Bernardino County Museum

## MISSION

---

Through the lens of the region's dynamic cultural and natural history, the San Bernardino County Museum develops visitors' appreciation of our diverse regional identity to spark their curiosity, to stimulate inquiry, to challenge their assumptions, and to invite them to contribute to our common future.

# CORE VALUES

---

- **Public Service:** We exist to better the lives of the citizens in our region.
- **Diversity:** We promote and celebrate the rich complexity of our region's past, present, and future and provide a welcoming, safe, and intellectually honest space for all people.
- **Engagement:** We provide our community the opportunity for active participation and reflection in our programs and exhibits.
- **Integrity:** We abide by professional ethics, honesty, and transparency.
- **Competence:** We take seriously our role as stewards of our region's legacy and are methodical in our collections practices, educational programming, and professional development.
- **Responsibility:** Our practices promote fiscal and environmental sustainability.
- **Collaboration:** We believe our community needs can be most successfully met through partnership with individuals and organizations committed to our mission.



# GOALS

# GOAL 1

## Develop and implement engaging visitor experiences

SBCM, founded in 1952, operates a museum in Redlands, a satellite museum in Apple Valley, and six historic sites.<sup>1</sup> The satellite Victor Valley Museum is organized around the theme, “Discover Your Own Backyard,” focusing on the archaeology, anthropology, history, geology, paleontology, and biological science of the high desert. The permanent exhibits at the Redlands campus present the cultural and natural history of the region, as well as changing exhibits originating from SBCM collections.

SBCM programming includes docent tours; public programs for families, children, and adults; ongoing programs led by community groups, such as the group of textile makers, which provides hand-weaving, spinning, and lacemaking demonstrations weekly; Sierra Club and Audubon Society, which give monthly public lectures; County departments, like Office of Emergency Services and Fire, that help with an annual Great Shake Out awareness event. The programming consists of one-time, as well as several annual events and has

increased under new leadership, drawing more interest from the public and increasing attendance.

SBCM leadership acknowledges the long-standing need to improve the visitor experience and become more visitor-focused by upgrading and modernizing the permanent exhibits, rethinking the overall Museum layout and visitor flow, connecting the Museum experience to school curriculum, and enhancing visitor amenities such as the Museum Store. There is also an opportunity to develop new interactive and compelling programming series that will establish deeper connections with new and repeat visitors.

Developing and implementing a dynamic visitor experience will be a top priority for SBCM over the next five years. Toward that end, SBCM will develop and implement an Interpretive Plan that will align with the Museum’s strategic priorities.

---

<sup>1</sup> For the purpose of planning the visitor experience, this goal will refer to only the main museum in Redlands and Victor Valley

Museum in Apple Valley. Throughout this plan “SBCM,” unless otherwise defined, will refer to all the sites in the museum’s system.

**GOAL 1: DEVELOP AND IMPLEMENT ENGAGING VISITOR EXPERIENCES**

OBJECTIVES	ACCOUNTABILITY	RESOURCES	COMPLETION DATE					
			2017	2018	2019	2020	2021	2022
<b>1.1 Develop an Interpretive Plan for the Redlands campus and Victor Valley Museum</b>	Museum Director	\$125,000		May				
<b>EXHIBITS</b>								
1.1.1 Hire a visitor experience consultant to lead the staff in reviewing overall approach for: <ul style="list-style-type: none"> <li>• How content is presented using a unifying theme</li> <li>• Moving from object based to experience based</li> <li>• Connecting exhibits to a regional story</li> <li>• Creating connections between indoor and outdoor spaces (also see Goal 3)</li> <li>• Establishing a five-year Interpretive Plan</li> </ul>	↓	↓		↓				
1.1.2 Launch an experimental space to test exhibit ideas with public	Curator of Visitor Engagement & Exhibits	TBD		Dec.				
1.1.3 Appoint a diverse group of volunteer advisors to provide feedback on visitor experience decisions	Various Curators	N/A	March & On-going					→
1.1.3.1 Establish criteria for selection, size of committee, guidelines, etc.	↓	↓	March					

OBJECTIVES	ACCOUNTABILITY	RESOURCES	COMPLETION DATE					
			2017	2018	2019	2020	2021	2022
1.1.4 Coordinate collections deaccessioning with Interpretive Plan (also see Goal 2)	Various Curators	N/A			March			
1.1.5 Introduce bilingual labels in galleries	Curator of Education	TBD		July & On-going				→
1.1.6 Determine a plan for changing/traveling exhibitions, including: <ul style="list-style-type: none"> <li>• How many exhibits per year</li> <li>• Guidelines</li> <li>• Exhibit themes</li> <li>• Community relevance</li> </ul>	Curator of Visitor Engagement & Exhibits ↓	N/A ↓		July ↓				
1.1.7 Develop and implement wayfinding plan	↓	\$50,000	June					
<b><u>PROGRAMS</u></b>								
1.1.8 Complete evaluation of all programs, events, classes, demonstrations, etc. (also see Goal 5)	Museum Director	TBD – cost of evaluation ↓		July				
1.1.9 Identify audiences to be served	Curator of Visitor Engagement & Exhibits	↓	Oct.					

OBJECTIVES	ACCOUNTABILITY	RESOURCES	COMPLETION DATE					
			2017	2018	2019	2020	2021	2022
1.1.10 Based on recommendations from exhibit review and planning, determine appropriate and complementary programs for audiences	Curator of Visitor Engagement & Exhibits; Curator of Education ↓	N/A ↓		July				
1.1.11 Determine the role of technology in the galleries	↓	↓		Dec.				
1.1.12 Re-establish a plan for nature walks/field trips with curators coordinated by the Education Department	Curator of Integrated Sciences; Curator of Education	TBD ↓		Jan.				
1.1.13 Develop a preschool/early learning space with community partners	Museum Director	↓				June		
1.1.14 Determine need and guidelines for holding classes at the Museum	Curator of Education ↓	N/A ↓	July					
1.1.15 Establish a volunteer group of teachers to provide guidance on curriculum-related programs	↓	↓	April					
1.1.16 Evaluate current Docent Program (also see Goal 6)	↓	↓	May					

OBJECTIVES	ACCOUNTABILITY	RESOURCES	COMPLETION DATE						
			2017	2018	2019	2020	2021	2022	
1.1.16.1 Based on evaluation, establish updated Docent Program, including: <ul style="list-style-type: none"> <li>• Recruitment</li> <li>• Training</li> <li>• Evaluation</li> </ul>	Curator of Education ↓	N/A ↓	August ↓						
1.1.16.2 Determine the need for a volunteer program beyond the docents	Curator of Education; Curator of Visitor Engagement & Exhibits ↓	↓	↓						
<b><u>VISITOR SERVICES</u></b>									
1.1.17 Develop a formal training program for front-line staff focused on customer service	Curator of Visitor Engagement & Exhibits ↓	TBD ↓	Sept.						
1.1.18 Examine feasibility of a “gathering place” for the visitors to have seating, wireless internet	↓	↓		July					
1.1.19 Study County restrictions regarding vendors to have coffee cart, food trucks, etc.	Museum Director ↓	N/A ↓	August						
1.1.20 Re-examine operating hours of Museum	↓	↓		Dec.					

OBJECTIVES	ACCOUNTABILITY	RESOURCES	COMPLETION DATE					
			2017	2018	2019	2020	2021	2022
<p><b><u>MUSEUM STORE</u></b></p> <p>1.1.21 Determine future operations of the Museum Store (also see Goal 5)</p> <ul style="list-style-type: none"> <li>• Type of inventory</li> <li>• Experience of Museum Store staff</li> <li>• Potential for underwriting of Store from private sources</li> </ul>	<p>Curator of Visitor Engagement &amp; Exhibits</p> <p>↓</p>	<p>N/A</p> <p>↓</p>			<p>Jan.</p> <p>↓</p>			
<p>1.1.22 Establish whether it is more cost effective to hire a contractor or full-time staff person to run the store</p>	<p>Museum Director</p> <p>↓</p>	<p>↓</p>			<p>↓</p>			
<p><b><u>WEBSITE</u></b></p> <p>1.1.23 Revamp the SBCM website to serve as a dynamic gateway for visitors</p>	<p>Media Specialist</p> <p>↓</p>	<p>TBD</p> <p>↓</p>			<p>June</p>			
<p>1.1.23.1 Offer online virtual tours of the Museum</p>	<p>↓</p>	<p>↓</p>				<p>July</p>		
<p>1.1.23.2 Regularly update the website to reflect Museum activity</p>	<p>↓</p>	<p>↓</p>			<p>June &amp; On-going</p> <p>→</p>			
<p>1.1.23.3 Add images and information on select pieces from the collection to website (also see Goal 2)</p>	<p>↓</p>	<p>↓</p>			<p>June</p>			

OBJECTIVES	ACCOUNTABILITY	RESOURCES	COMPLETION DATE					
			2017	2018	2019	2020	2021	2022
<b>1.2 Coordinate fundraising efforts to fund visitor experience with other priorities of the Museum</b>	Museum Director ↓	N/A		June				
<b>1.3 Implement Interpretive Plan</b>	↓	TBD				June		
<b>1.4 Continue ongoing evaluation of exhibits and programs</b>	Curator of Visitor Engagement & Exhibits	TBD – cost of evaluations		July & On-going				→
<b>1.5 Consider an exhibition curated by the community</b>	Curator of History; Curator of Anthropology	TBD ↓				Jan.		
<b>1.6 Establish a teen program</b>	Curator of Education ↓	↓			June			
1.6.1 Recruit a planning group to determine the nature of the teen program, collaborating organizations, etc.	↓	N/A	Dec.					



# GOAL 2

## Focus, organize, and strategically steward the collection

SBCM collections include approximately 3 million objects in the following categories: biology, earth sciences, archeology, anthropology, history, and fine art. The object collections are on view in permanent and temporary displays, and are stored on- and off-site.

In July 2016, the Museum completed a Collections Stewardship Assessment as part of the American Alliance of Museums (AAM) Museum Assessment Program (MAP) to review collections storage issues, prepare for re-accreditation in 2017, and help determine the focus of the collections. The MAP report provides a detailed Action Plan, which the staff began to implement in 2016.

In addition to specific action items in the MAP Assessment, there are other collections-related issues to be addressed in

the next five years. Accessible electronic information on the collections is slowly becoming available to the general public and to researchers; accelerated implementation of collections data input will require additional staff hours. Currently, curators of history, anthropology, earth sciences, and integrated sciences are tasked with this work, in addition to their other responsibilities.

The art collection – which numbers over 600 items – is under-developed and needs care, albeit its role in the future of the Museum is yet to be determined.

Finally, the renovation and consolidation of storage spaces and ongoing object conservation will be addressed.

**GOAL 2: FOCUS, ORGANIZE, AND STRATEGICALLY STEWARD THE COLLECTION**

OBJECTIVES	ACCOUNTABILITY	RESOURCES	COMPLETION DATE					
			2017	2018	2019	2020	2021	2022
<b>2.1 Complete MAP Assessment Action Plan</b>	Curators (Collections) ↓	TBD – costs of storage upgrades, materials ↓						June
2.1.1 Complete short-term MAP recommendations			June					
2.1.2 Complete mid-term MAP recommendations				June				
2.1.3 Complete long-term MAP recommendations								June
<b>2.2 Increase accessibility of collections</b>	Registrar ↓	TBD ↓		Dec. & On-going ↓				→
2.2.1 Add selected collections images and information to website in searchable format (also see Goal 1)								
2.2.2 Encourage community dialogue about collections through the visitor experience	Curator of Visitor Engagement & Exhibits							

OBJECTIVES	ACCOUNTABILITY	RESOURCES	COMPLETION DATE						
			2017	2018	2019	2020	2021	2022	
<b>2.3 Activate use of the collections by researchers</b>	Curators (Collections)	TBD		July & On-going	→				
2.3.1 Convene curators regularly to assure progress is being made	Museum Director	N/A		↓					
<b>2.4 Address issue of collections growth</b>					March				
2.4.1 Develop an Accessions Plan					↓				
2.4.2 Develop a De-Accessioning Plan that addresses objects/collections that do not adhere to Museum's core mission				Dec.					
<b>2.5 Add Collections staff to accelerate cataloguing work</b>		TBD		July					
2.5.1 Develop initial funding for salary through private sources	Museum Support Groups			↓					
<b>2.6 Plan for the renovation of storage spaces to consolidate and ensure proper environmental controls (also see Goal 3)</b>	Museum Director			August					

OBJECTIVES	ACCOUNTABILITY	RESOURCES	COMPLETION DATE					
			2017	2018	2019	2020	2021	2022
<b>2.7 Assess and address conservation needs</b>	Registrar	TBD						
2.7.1 Apply for a Collections Assessment for Preservation (CAP) grant through the Institute of Museum and Library Services	↓	N/A		Sept. (apply)				
2.7.2 Once CAP report is in hand, partner with Museum support groups to raise funds for implementation	Museum Director	TBD			Sept.			

# GOAL 3

## Refresh and upgrade SBCM facilities

SBCM facilities include multiple buildings on the Redlands campus, the Victor Valley Museum, and five historic sites located around San Bernardino County. The Redlands Museum facility was opened to the public in 1974, and an addition was built in the early part of this decade. The County has continued to fund capital improvement projects for the Museum on a regular basis. Improvements will continue to be made to the original exhibit spaces and overall facility to reflect modern museum best practices.

The overall layout of the Redlands Museum will be evaluated and rethought in the initial years of this Strategic Plan in order to make the facility more welcoming and efficient. A key priority in that planning process will be to overhaul the on-site collections storage (off-site storage was upgraded in 2016) to ensure adequate space and proper conditions for collections both on- and off-site. The resulting changes, together with the Interpretive Plan (detailed in Goal 1), will

provide a roadmap for developing a renewed, contemporary, and accessible space for visitors.

The Museum has been proactively evaluating options for its historic branches, including developing partnerships with local nonprofit organizations to participate in the stewardship of these sites. As opportunities arise to transfer ownership to appropriate organizations with historic preservation missions, the Museum will consider and determine action on each individual site. The Museum has already achieved success in transferring ownership of the Daggett Stone Hotel to the Daggett Historical Society and is in the process of partnering with the Redlands Conservancy to take ownership of the Asistencia. Above all, SBCM is cognizant of its duty to be good stewards of its resources, which are held in the public trust.

GOAL 3: REFRESH AND UPGRADE SBCM FACILITIES							
OBJECTIVES	ACCOUNTABILITY	RESOURCES	COMPLETION DATE				
			2017	2018	2019	2020	2021
<b>REDLANDS CAMPUS</b>							
<b>3.1 Work with County Project Management Division to develop an ADA facility upgrade strategy</b> <ul style="list-style-type: none"> <li>• Create comprehensive plan for facility ADA upgrades</li> <li>• Estimate construction costs</li> <li>• Apply for CIP funds as available</li> </ul>	Museum Director	TBD	June & On-going				
<b>3.2 Work with County Project Management Division to evaluate current Redlands and Victor Valley Museum sites</b> <ul style="list-style-type: none"> <li>• Definition of space needs</li> <li>• Evaluation of existing facilities</li> <li>• Rethinking of storage, collection, and office spaces</li> <li>• Estimation of implementation costs</li> <li>• Align with Interpretive Plan</li> <li>• Apply for CIP funds as available</li> </ul>			Sept.				

OBJECTIVES	ACCOUNTABILITY	RESOURCES	COMPLETION DATE					
			2017	2018	2019	2020	2021	2022
<b>3.3 Conduct an assessment of outdoor spaces on the Redlands campus, identifying utilization, limitations, and potential uses (also see Goal 1)</b>	Museum Director ↓	TBD ↓			Dec			
3.3.1 Based on assessment, develop and implement plans to increase utilization of outdoor spaces and maximize revenue generation (i.e. rentals, children’s space)						June		
<b>3.4 Upgrade security technology, including introduction of card access to buildings to better control security of the Museum</b>				July ↓				
<b>3.5 Secure effective WiFi for the Museum</b>								
<b><u>BRANCH SITES</u></b>								
<b>3.6 Establish partnerships between SBCM historic sites and local historic/preservation groups to improve stewardship and activation of all sites</b>	Museum Director ↓	TBD	Jan. & On-going ↓					→
3.6.1 Identify and develop relationships with historical societies, conservancies, and historic preservation groups in each branch site community		N/A						
3.6.2 Determine feasibility of conveying ownership and operations of properties to local historic organizations		TBD ↓						

# GOAL 4

## Increase visibility and awareness to grow visitation

Current annual visitation to SBCM is estimated to be 55,000 per year, of which 60% are San Bernardino County residents. The audience is primarily families with children, followed by school groups and seniors. Marketing is the responsibility of a half-time Media Specialist, with related functions spread throughout the staff. Marketing efforts consist of public relations and earned media, social media, e-newsletters, and website content centered on exhibitions and events. Identification of increased funding from grants and other contributed revenue would help in building this effort. SBCM also partners with the County, the Museum Association, external community groups like the Kiwanis Club, and local

schools to promote programmatic offerings. Visitor city codes are collected at the front desk and social media followers are also tracked.

Going forward, it will be important to determine who is and who is not visiting the Museum and why. The information gained from research will strengthen marketing efforts and impact the ability to have exhibitions and programs that are relevant to the community and that will increase attendance.



**GOAL 4: INCREASE VISIBILITY AND AWARENESS TO GROW VISITATION**

OBJECTIVES	ACCOUNTABILITY	RESOURCES	COMPLETION DATE					
			2017	2018	2019	2020	2021	2022
<b>4.1 Develop a Marketing Plan with the goal of achieving 100,000 visitors per year by 2022</b>	Media Specialist ↓	N/A ↓		June				
4.1.1 Establish a volunteer group of advisors to brainstorm marketing goals and strategies		↓	Sept.					
4.1.2 Determine target audiences and strategies for attracting each including:  <ul style="list-style-type: none"> <li>• Millennials</li> <li>• Homeschoolers</li> <li>• Military</li> <li>• African-American community</li> <li>• Tourists</li> <li>• Individuals needing Facility Rentals</li> </ul>		TBD – cost of evaluation ↓	March ↓					
4.1.3 Explore opportunities for partnerships such as:  <ul style="list-style-type: none"> <li>• Childrens’ museum associations</li> <li>• Bank of America’s “Museums on Us” and similar corporate programs</li> <li>• Smithsonian Affiliate</li> <li>• Groupon</li> </ul>	Museum Director ↓	N/A ↓	Jan. & On-going ↓	→				

OBJECTIVES	ACCOUNTABILITY	RESOURCES	COMPLETION DATE					
			2017	2018	2019	2020	2021	2022
<b>4.2 Based on the Marketing Plan, increase capacity by hiring a full-time staff person or contractor dedicated to marketing with potential underwriting from Museum support groups (also see Goal 6)</b>	Museum Director	TBD		July ↓				
<b>4.3 Establish and implement evaluation protocols for all programs to understand impact on visitors</b>	Curator of Visitor Engagement & Exhibits ↓	TBD – cost of evaluations ↓		↓				
<p>4.3.1 Develop and evaluate exhibitions, events, and programs by the following criteria:</p> <ul style="list-style-type: none"> <li>• Attendance</li> <li>• Quality of experience</li> <li>• Mission driven</li> <li>• Builds awareness of SBCM</li> <li>• Relevance to the community</li> <li>• Attractiveness to donors and sponsors</li> <li>• Cost effectiveness</li> </ul> <p>4.3.2 Collect demographic information and impact of visit through on-site visitor surveys and/or online surveys</p>	↓	↓			July & On-going ↓ July			→

# GOAL 5

## Diversify sources of revenue to build financial sustainability





SBCM has an operating budget of approximately \$3.5 million (FY17). Of that amount, an estimated 90% is funded by the County, and the balance is funded by contributed revenue from the Museum Association and earned income. The Museum's earned income is derived mainly from admissions, facility rentals, and fee based programs, with the Museum Store serving as an enterprise fund.

Contributed revenues are raised by the private nonprofit Museum Association on behalf of SBCM, which as a department of the County, cannot directly solicit funds. The Association raises these funds through grants, memberships, Board donations, events, sponsorships, individual donations, and planned giving. The Association has been working more closely with SBCM since the hiring of the new Museum and Association Executive Directors, and has provided increasing levels of support for SBCM projects and other specific needs. Although the Museum does not have an endowment of its own, the Association holds endowment funds of approximately \$2 million.

SBCM has faced financial challenges in recent years, with falling revenues and stagnant expenses, but the County has remained a steadfast supporter, increasing its financial support during challenging times, and providing additional funds for long-term investments in the Museum. While the County has expressed its ongoing support for SBCM, the County's budget process is annual and can adjust from year to year depending on the economy, public priorities, and other factors, so guaranteed government funding should not be relied upon as a primary source of income into the future; revenue diversification must continue to be sought and addressed.

Given these funding realities, SBCM has made it a top priority to diversify its sources of funding. This will include assessing all current and potential earned income opportunities and maximizing potential revenues. It will also include working closely with Museum support groups to build a robust fundraising program, grow the endowment, and expand the number of people who serve as champions for the Museum.

**GOAL 5: DIVERSIFY SOURCES OF REVENUE TO BUILD FINANCIAL SUSTAINABILITY**

OBJECTIVES	ACCOUNTABILITY	RESOURCES	COMPLETION DATE						
			2017	2018	2019	2020	2021	2022	
<b><u>COUNTY</u></b>									
<b>5.1 Meet with County Administrative Office to evaluate and understand County fundraising process and potential improvements</b>	Museum Director	N/A		Nov.					
<b><u>CONTRIBUTED REVENUE</u></b>									
<b>5.2 Revise and update the MOU between the County and Association, and include:</b> <ul style="list-style-type: none"> <li>• Preparation and ongoing use of a Development Plan</li> <li>• Alignment of Association long-range plans with SBCM’s Strategic Plan</li> <li>• Percentage of Association investment dollars and membership fees to be given to SBCM each year</li> <li>• Potential of underwriting select staff salaries and specific projects</li> </ul>	Museum Director; SBCM Association 	N/A 	May 						
<b>5.3 Collaborate with Museum support groups to increase contributed revenue</b>	Museum Director	N/A	Jan. & On-going						

OBJECTIVES	ACCOUNTABILITY	RESOURCES	COMPLETION DATE					
			2017	2018	2019	2020	2021	2022
5.3.1 Work with Museum support groups to assess feasibility of conducting a capital campaign for implementation of Interpretive Plan (see Goal 1)	Museum Director	N/A		August				
<b>5.4 Increase SBCM annual contributed revenue to \$200,000 (excluding grants)</b>	Museum Support Groups	N/A						June
<b><u>EARNED INCOME</u></b>								
5.5 Evaluate current sources of earned revenue for maximum income potential and audience targeting	Museum Director	N/A		August				
5.6 Review the costs, pricing, visibility, promotional materials, outreach, and usage of the facility rental program	Finance Tech	N/A		June				
5.6.1 Conduct market study of regional venues for benchmarking		TBD – internal study						
5.6.2 Update facility rental program based on findings		TBD						
5.6.3 Increase outreach to area hotels		TBD – cost of marketing materials						

OBJECTIVES	ACCOUNTABILITY	RESOURCES	COMPLETION DATE					
			2017	2018	2019	2020	2021	2022
<b>5.7 Build SBCM’s capacity to grow programs through enhanced grant funding, staffing, and volunteers</b>	Museum Director ↓	TBD ↓				July		
<b>5.8 Increase admissions revenues through increased attendance (target of 100,000 visitors by 2022)</b>		↓						June
5.8.1 Review admission fees to maximize revenue potential while remaining accessible to visitors	↓	N/A				June ↓		
<b>5.9 Maximize Museum Store potential and revenue (also see Goal 1)</b>	Curator of Visitor Engagement & Exhibits ↓	TBD ↓						
5.9.1 Establish incentives to increase Museum Store revenues each year	↓					↓		
5.9.2 Develop online presence for Museum Store	Media Specialist	↓					August	

# GOAL 6

## Enhance organizational capacity to fulfill the SBCM mission

This Strategic Plan details a vision of growth and increased relevance for SBCM in the region. In order to achieve that vision, fulfill its mission, and ensure long-term sustainability, SBCM will need to strengthen its organizational capacity, bringing the Museum to the next level of operational maturity and effectiveness. This will mean assessing staffing to determine the most efficient use of this resource, and

increasing capacity in needed areas; building the volunteer corps to meet the Museum's priorities; securing funds to allow for staff growth; and enhancing professional development opportunities.

**GOAL 6: ENHANCE ORGANIZATIONAL CAPACITY TO FULFILL THE SBCM MISSION**

OBJECTIVES	ACCOUNTABILITY	RESOURCES	COMPLETION DATE					
			2017	2018	2019	2020	2021	2022
<b>6.1 Align the SBCM organizational chart with the priorities outlined in the Strategic Plan</b>	Museum Director ↓	TBD ↓		Sept.				
6.1.1 Over five years, evaluate areas of needed growth and other sources of revenue	↓	↓		Sept. & On-going	→			
<b>6.2 Study the best use of volunteers at SBCM and create a plan for expanding the volunteer corps (also see Goal 1)</b>	Curator of Education	N/A		May				
<b>6.3 Provide professional development opportunities for staff (i.e. training at the Museum, field trip to L.A. museums, conferences)</b>	Museum Director ↓	TBD		July & On-going	→			
6.3.1 Continue to utilize County's Customer Service FIRST training for all Museum employees	↓	N/A ↓	Jan. & On-going	→				
<b>6.4 Establish an oversight committee to monitor implementation of Strategic Plan</b>	↓	↓	March					



# Appendix: Strategic Plan Participants

---

## Planning Committee

**Leonard Hernandez**, Deputy Executive Officer, San Bernardino County Community Services

**Maggie Latimer**, Executive Director, San Bernardino County Museum Association

**David Myers**, Curator of Visitor Engagement and Exhibits, San Bernardino County Museum

**Steven Raughley**, Chief Financial Officer, San Bernardino County Community Services

**Melissa Russo**, Director, San Bernardino County Museum

## Planning Participants

**Diana Alexander**, Director, Preschool Services, San Bernardino County

**Yasmin Alvarez**, Community News Editor, Inland Empire Weekly

**Mary Ashley**, Deputy District Attorney, San Bernardino County

**Dean Ayer**, Regional Representative, California Association of Museums

**Cynthia Breunig**, President & CEO, Girl Scouts of San Gorgonio

**Doug Boyd**, Policy Advisor, Office of San Bernardino County Fourth District Supervisor Curt Hagman

**Paulette Brown-Hinds**, Publisher, BPC Media Works

**Bill Butler**, Director of Creative Design, Garner Holt

**Nick Cataldo**, Historian, California State University, San Bernardino

**Lee Clauss**, CRM Director, San Manuel Band of Mission Indians

**Brianna Correa**, Guest Services, San Bernardino County Museum

**Greg Devereaux**, CEO, San Bernardino County

**Jennifer Dickerson**, Curator of History, San Bernardino County Museum

**Abby Flores**, Board Member, San Bernardino County Museum Association

**Dan Flores**, Chief of Staff, Office of San Bernardino County Fifth District Supervisor Josie Gonzales

**Patti Flores**, Volunteer, San Bernardino County Museum

**Skip Forster**, Volunteer, San Bernardino County Museum

**Danielle Giudici Wallis**, Executive Director, Arts Connection; California State University, San Bernardino

**Christine Granillo**, Director of Research & Evaluation, Student Affairs, UC Riverside School of Medicine

**Sophia Haflinger**, Guest Services, San Bernardino County Museum

**Sarah Harty**, Guest Services, San Bernardino County Museum

**Kristina Hernandez**, Reporter, Southern California News Group, Inland Division

**Norm Kanold**, Board Member, San Bernardino County Museum Association

**Sarah Kenington**, Registrar (retired), Fowler Museum

**Carol Lohoefer**, Volunteer, San Bernardino County Museum

**Cassie MacDuff**, Marketing Manager, Ontario International Airport Authority

**Melissa McClain**, Deputy Chief of Staff, Office of San Bernardino County First District Supervisor Robert Lovingood

**Kathryn McNair**, Instructor, Redlands Special Ed/Transitions Program

**Dean McVay**, Board President, San Bernardino County Museum Association

**Marilyn Mills**, President, Heritage Trails Association

**Amparo Munoz**, Asset Care Manager, Veolia Water

**Lewis Murray**, District Representative, Office of San Bernardino County Second District Supervisor Janice Rutherford

**Susan Newcomb**, Financial Tech, San Bernardino County Museum

**Drew Oberjuerge**, Executive Director, Riverside Art Museum

**Genevieve Preston**, Archivist, San Bernardino County

**Jennifer Reynolds**, Media Specialist/Registrar, San Bernardino County Museum

**Anita Rios-Sherman**, Homeschooler

**Janice Rutherford**, San Bernardino County Second District Supervisor

**Janice Sardina**, Volunteer, San Bernardino County Museum

**Tamara Serrao-Leiva**, Curator of Anthropology, San Bernardino County Museum

**Faye Smith**, Volunteer, San Bernardino County Museum

**Joan Stumbaugh**, Volunteer, San Bernardino County Museum

**Mark Taylor**, Deputy Chief of Staff, Office of San Bernardino County Second District Supervisor Janice Rutherford

**Carolyn Tillman**, Special Assistant to the Superintendent, San Bernardino County Superintendent of Schools

**Eleanor Torres**, Co-Executive Director, Incredible Edible Community Garden

**Regina Weatherspoon-Bell**, Field Representative, Office of San Bernardino County First District Supervisor Robert Lovingood

**Barbara Williams**, Board Member, San Bernardino County Museum Association

**Mark Williams**, Volunteer, San Bernardino County Museum

**Jonathan Lorenzo Yorba**, President & CEO, The Community Foundation

**Carolina Zataray**, Curator of Education, San Bernardino County Museum