

# Museum of Riverside Five-Year Strategic Plan 2019-2024

## Strategic Plan 2019-2024

Approved for adoption by the Metropolitan Museum Board on June 12, 2019. Approved by City Council on November 5, 2019.

Updates as of 30 September 2019

### Mission of the Museum of Riverside

As a center for learning, the Museum of Riverside interacts with the community to collect, preserve, explore, and interpret the cultural and natural history of Riverside and its region.

Approved by the Metropolitan Museum Board on December 15, 2015. Revised to reflect name change effective April 23, 2019.

## Plan History

### City Strategic Plan – Riverside 2.0 and 2.1

The Museum’s Strategic Plan necessarily relates to larger strategic goals adopted by the City of Riverside in 2015. As relevant to Museum operations, staff will strive to advance the City of Riverside’s Strategic Priorities, as codified in *Riverside 2.1* (adopted 20 June 2017), which include:

- ✓ Enhanced customer service / improved quality of life
- ✓ Economic development / continue to develop an economically vibrant city
- ✓ Community services / provide appealing, accessible, and safe venues
- ✓ City transportation program / continue to develop efficient transportation systems and provide affordable options for community mobility
- ✓ Improve housing diversity and options
- ✓ Improve teamwork and communications
- ✓ Reduce taxpayer liability and reduce costs wherever possible.

When *Riverside 2.0* and *2.1* were adopted, the Museum Department included Arts & Cultural Affairs. In mid-2017, Arts & Cultural Affairs returned to the Community and Economic Development Department. *Riverside 2.0* and *2.1* continue to contain actions for the Museum Department that apply solely or primarily to the Arts & Cultural Affairs division; they are lined out below. Actions completed are in [square brackets]. All others are reshaped and subsumed into the new plan.

- ~~✓ Implement an updated Riverside Arts Plan including enhancing partnerships with City Departments, educational institutions, Native Nations, arts community, artists and businesses (local and regional), and elevating arts and culture for and in the community.~~
- ✓ Identify, develop, and implement feedback tools for customer service and program planning purposes.
- ✓ Provide public access to the Museum collection through ARGUS.NET.
- ✓ Relocate Museum Archives to consolidate with Library, City Clerk, and Public Utilities to enhance public access and provide additional exhibit potential.
- ✓ Develop museum membership program whereby individuals and organizations can support and engage with the Museum.
- ✓ [Enhance stewardship of historic sites through annual maintenance and project plans.]

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- ~~✓ Enhance Festival of Lights~~
- ✓ [Complete Museum Department accreditation process.]
- ~~✓ Increase revenue generation from the Fox Performing Arts Center and Riverside Municipal Auditorium.~~

## Recent Museum-Specific Assessments

In 2016 and 2017, the Museum Department’s goals were reconsidered in light of the results of the American Alliance of Museums’ Re-Accreditation Visiting Committee’s report and a thorough operational assessment conducted by Museum Management Consultants, Inc., San Francisco. These reports contain dozens of recommendations affecting all functional areas that inform the new Strategic Plan. See key on page 3 for symbols indicating actions that address those recommendations.

## Early Renewal of Museum’s Five-Year Plan

The Museum of Riverside (MoR) embarks on its next five-year period at an institutional turning point. Altered MoR circumstances not anticipated at the time the 2016-2021 Plan was adopted require an early review and renewal of the five-year Strategic Plan. With city financial support available to address longstanding needs, including downtown site renovation and operational overhaul, the MoR will retool to embrace its mission in new ways and with different, updated priorities.

The MoR’s 2016-2021 Strategic Plan was organized into four categories: Governance, Sustainability, Education, and Stewardship. While abandoning none of the core concerns inherent to these four categories, institutional change in the coming five-year period pivots on five key functions within which the MoR will continue to address governance, sustainability, education, and stewardship:

- ✓ Renovating
- ✓ Exhibiting and Engaging
- ✓ Embracing Community
- ✓ Strengthening Fundamentals
- ✓ Maximizing Resources and Stewarding Assets

The museum field as a whole is also guided by the American Alliance of Museums’ own strategic plan. The principles and goals that it foregrounds will also inform the Museum Department’s plan. These goals include Excellence, Advocacy, Global Thinking, Access, and Thought Leadership. The Museum Department places particular emphasis on Excellence, Access, and Thought Leadership in its 2019-2024 Strategic Plan.

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## Executive Summary

### *New Plan for 2019 through 2024*

The MoR recommits to its mission, and cross-functional institutional goals will chart the course over the next five years. It is important to note that this Plan does not describe ongoing baseline activities and community collaborations that are fundamental activities in any year. Nor does it restate position descriptions or reiterate professional standards. Rather, the Strategic Plan for fiscal years 2019-2020 through 2023-2024 emphasizes goals that are over and above steady-state operations, and initiatives that are unique to the MoR’s process of reinventing itself to serve 21st-century audiences and enter into its second century of operation. The actions in the 2019-2024 Plan are 1) integral to larger goals, 2) important, 3) future-focused, and 4) aspirational. The Plan reaffirms the MoR’s aim to serve as a center for learning and as an indispensable community resource. Actions that will crosscut all internal functions include:

- ✓ Achieving earned and contributed revenue growth,
- ✓ Benchmarking to our museum peers in order to meet and exceed industry standards,
- ✓ Implementing initiatives to grow and diversify audiences, and
- ✓ Maximizing the opportunity presented by the MoR’s 100th anniversary in the year 2024.

Note that certain assumptions underlie this Plan. One, genuine program growth and achieving best practices across the board when they were previously lacking will require additional resources, staff in particular. Two, actions in this plan that comprise exploratory research may not necessarily result in the decision to implement a new exhibition, program, or project.

In the plan below, staff are indicated by name for positions that are filled at this time of this draft. Names will be revised as relevant during quarterly status reports. Advisory bodies indicated are those directly associated with the Museum. It is understood that other City departments and individuals will play advisory roles.

- \* = Indicates a staff position not created and / or filled at the time of Plan approval. If the position is ultimately not filled, responsibility reverts to the individual to whom that absent staffer would have reported. Positions not filled will result in modification of plan goals, timetables, or both.
- φ = Supports Riverside 2.1 and / or its specific Museum Department objectives.
- ◇ = Supports a recommendation from the Museum Management Consultants’ assessment and/or the Re-Accreditation Visiting Committee’s report.
- green = Information in green in the Financial Impact column indicates an action for which revenues may exceed or partially offset costs.

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## Strategic Goal: RENOVATING

In the wake of a thoroughgoing recognition in 2016-2017 of the need for institutional change, funding was allocated from Measure Z funds to address a wide array of main museum site issues, and to use the closure that would be required to address facility and collections care challenges as an opportunity to engage in a dramatic reinvention. Long overdue updating of the brand and website will logically be pursued in conjunction with this process of reinvention.

Action	Staff point person(s)	Outside advisory / partners	Financial impact <i>O=operating C=capital</i>	Timetable <i>A=immediate B=mid-plan C=end of plan</i>	Target audience	Measurable success criteria
<b>Mission and vision:</b> Establish an inclusive process to create vision and core values statements.	Peterson	Board	O = Staff time	A	All	Statements result that at least 90% of participants agree are relevant and appealing. Responses to be gathered informally at multiple stages of statement development.
<i>Status: Have not started yet.</i>						
<b>Downtown renovation:</b> ϕ Implement renovation and expansion of Mission Inn Avenue site, including grounds, new Nature Lab, and all planned and necessary support functions.	Peterson	General Services Department, Board, Director's advisory design team	C = Minimum \$13.7 million from Measure Z; may be supplemented, including privately	A, B	All	Renovated and expanded site is opened by mid-2022: on time, on budget, and to acclaim.
<i>Status: Phase I design process nearing completion with option(s) developed that meet functional needs.</i>						
<b>Downtown renovation:</b> ϕ Anticipate and plan for changed operational needs upon reopening.	Peterson, Lovell, Kinsman	Board	O = Staff time; some potential equipment purchase needs TBD; some savings realized in procedural efficiencies	A, B	Internal	No more than 10% of staff time is expended resolving unanticipated operational and procedural issues arising during the six months after opening.
<i>Status: Have begun list of reopening tasks to schedule when opening date set.</i>						
<b>Downtown renovation:</b> ϕ Collaborate with Library Department and others for sound and efficient management of City archival resources.	Peterson, *Mgr. of Curatorial Services	Director's advisory design team, Library Director, City Clerk	C = Savings or expense TBD within cross-departmental capital budgets	A, B, C	Archives inquiry audiences	By 2024, all City archives are logically and safely housed either together or dispersed in facilities designed and staffed to meet baseline standards of care and access.
<i>Status: Good progress on defining each department's collecting scope and culling City Clerk's archives.</i>						
<b>Communications:</b> ◇ Engage in institutional rebranding.	Peterson, *Mgr. of Institutional Advancement	City Marketing Department, Director's advisory rebranding team, Board	O = Staff time	A, B	All	New brand, signage, and all associated templates and graphic package needs are finalized prior to reopening. All features of design package meet with at least 90% positive internal and external response.

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<i>Status: Marketing Department has generated five concepts under consideration; CBU's advance graphics class is working on the Museum's rebrand as their fall 2019 project with presentation planned for 5 December 2019.</i>						
<b>Communications:</b> ϕ ◇ Overhaul website in conjunction with institutional rebranding.	Peterson, *Mgr. of Institutional Advancement	Director's advisory rebranding team, City Marketing Department	O = Staff time	A, B	All	New ADA-compliant website completed by 31 December 2019 as first phase of rebranding initiative in order to serve as construction update portal and basis for reopening anticipation campaign. Website meets with at least 90% positive internal and external response. Incrementally increasing reach documented through social media metrics (Facebook, Twitter, Instagram, Pinterest, etc.).
<i>Status: Pending rebrand</i>						

## Strategic Goal: EXHIBITING and ENGAGING

In addition to exhibitions, the Museum's educational programming encompasses development, implementation, and evaluation of all on-site and off-site Museum programs. These may include experiential learning opportunities such as drop-in programs, curriculum-based school tours, camps, special events, lectures, performances and other informal enrichment programs. These programs are ripe for reevaluation, expansion, and reinvention.

Action	Staff point person(s)	Outside advisory / partners	Financial impact <i>O=operating C=capital</i>	Timetable <i>A=immediate B=mid-plan C=end of plan</i>	Target audience	Measurable success criteria
<b>Exhibitions:</b> ϕ Schedule and implement two to four exhibitions to reopen the Mission Inn Avenue site memorably.	Peterson, *Mgr. of Curatorial Services	Director's program advisory team, exhibition design firm, guest curators	O = \$150,000 to \$250,000 C = tentatively set at \$500,000 to \$750,000 for mobile walls and cases within renovation project	B, C	All	Two to four exhibitions reopen the downtown site to wide acclaim. A broad cross-section of the community responds positively to reopening exhibitions.
<i>Status: Im/migration, food, and Riverside stories exhibitions all in early planning. Guest curators identified for two of them, and preliminary scopes of work for exhibition design firms developed.</i>						
<b>Exhibitions and education:</b> ϕ ◇ Develop a holistic Interpretive and Education Policy including visitor experience outcomes and evaluation goals. To address use of collections	*Mgr. of Curatorial Services, Belding, all content specialists	Director's program advisory team	O = staff time	B, C	Internal	A flexible plan is finalized that assists in giving coherence to overall programming, supports coordinated fundraising efforts, and integrates the collections in exhibition planning and scheduling processes.

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and MoR’s role in and commitment to cultural sustainability.						
<i>Status:</i>						
<b>Exhibitions:</b> Develop and maintain a calendar of upcoming exhibitions with a constant three-year planning horizon.	*Mgr. of Curatorial Services	Director’s program advisory team	O = \$100,000-\$300,000 exhibition costs annually; <b>sponsorship potential is high</b>	A, B, C	Internal; resident and out-of-area tourist audiences	Exhibition schedules are confirmed in advance of budget planning cycles. Exhibitions confirmed sufficiently far in advance to include adjunct programs. After reopening, a new exhibition opens at least three times annually. Exhibition calendars are marketed in advance.
<i>Status: Calendar does not yet go beyond reopening exhibitions, although discussions are taking place on high interest exhibition topics.</i>						
<b>Exhibitions:</b> By 2022, finalize a plan for all programming and citywide participatory partnerships in 100th anniversary (2024) celebration. To include events, exhibitions, programs, and marketing.	Peterson, all senior staff/team leaders	Director’s program advisory team, cultural directors’ consortium, collaborative partners TBD	O = staff time; early estimate \$125,000 for exhibition, \$50,000 for other programming and collateral; <b>sponsorship potential is high</b>	C	General, school districts	A plan is fully developed in time to fundraise and coordinate content to ensure that the 100th anniversary opportunity is maximized. All staff are clear about their roles, and all City departments playing a part have integrated the MoR’s 100th into their own annual plans.
<i>Status:</i>						
<b>Exhibitions:</b> ϕ Develop, install pocket exhibits with fresh design in key community locations.	*Mgr. of Curatorial Services	Director’s program advisory team	O = \$2,000-\$5,000 each, implementing about one per year; <b>grant funding is possible</b>	B, C	Priority to underserved neighborhoods on west end and Casa Blanca	A minimum of two new long-term pocket exhibits are installed by the end of the plan. A schedule of additional exhibits is developed.
<i>Status:</i>						
<b>Exhibitions:</b> Develop an innovative digital approach to Heritage House virtual tour and room books.	Masengale, Langevin	Docents, Heritage House Operations Committee	O = staff time; digital consultant TBD (likely capital expense); <b>grant funding is possible</b>	B, C	All audiences, including website visitors	Phased plan for full virtual tour of historic house is established; initial exploratory testing completed.
<i>Status:</i>						
<b>Evaluation:</b> ϕ ◇ Develop an effective audience survey mechanism.	*Mgr. of Institutional Advancement	Marketing Department	O = staff time	B, C	Exhibition visitors, school program users, event attendees	Surveys provide statistically valid feedback that usefully informs program (re)development.
<i>Status:</i>						
<b>Evaluation:</b> ◇ Further institutionalize staff-level pre- and post-evaluation for all programs.	*Mgr. of Curatorial Services	N/A	O = staff time	A, B, C	Internal	Staff experience a 90% reduction in last-minute surprises and in programs that do not meet goals.
<i>Status: Draft evaluation tool developed.</i>						

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<b>Education:</b> ☐ Assess capacity for formal partnerships with school districts, private schools: <ul style="list-style-type: none"> <li>• curriculum-based programs</li> <li>• after-school programs</li> <li>• transportation</li> </ul>	Belding, Leland	School district contacts, Director's program advisory team	O = staff time; <b>cost-sharing revenue will be pursued</b>	B, C	Internal, education colleagues	Partnerships are formalized and include cost-sharing contributions. Partner feedback indicates that MoR partnerships are essential to educators meeting their own curriculum mandates.
<i>Status:</i>						
<b>Education:</b> Revitalize docent program for Mission Inn Avenue site, to sync with reopening.	Belding	RMA	O = staff time, consulting costs for guest presenters / trainers	B	Docents and, by extension, MoR visitors	Size of docent corps increases by 50% from 2018 levels. Docent training program is year-round. Docents' positive response rate is at least 75%. Attrition due to causes other than health or age declines.
<i>Status:</i>						
<b>Publications:</b> Incorporate a publication with "shelf life" with every original exhibition.	*Mgr. of Curatorial Services	Director's program advisory team,	O = Publication costs \$5,000 and up, per each; anticipating one to two annually; <b>modest catalog sales revenues</b>	C	Publication-dependent, ranging from general to specialist audiences	A bibliography of Museum publications takes shape that are a credit to the Museum in academic, general, philanthropic, and similar networks.
<i>Status:</i>						
<b>Special outreach:</b> ☐ Grow outreach audiences; develop at least one new outreach partnership per fiscal year; mitigate attrition and survey potential groups to determine needs.	Belding, Leland	Partner groups	O = staff time, modest costs for printed and digital materials	C	Groups such as home schoolers, individuals in juvenile detention, Sherman Indian school, deaf community, senior centers, and others.	Maintain a steady calendar of outreach programming to non-traditional and at-risk audiences. Participant feedback is a minimum of 80% positive.
<i>Status:</i>						
<b>Education:</b> ☐ Implement regular, recurring history program for children.	Belding	Schools	O = staff time, modest materials expenses for refreshing program; <b>possible fee-based program</b>	C	Elementary and intermediate school	By 30 June 2022, a program has been (re)developed that 1) receives positive ratings exceeding 85% and 2) is acknowledged by educators to assist them in meeting curriculum mandates.
<i>Status:</i>						
<b>Education:</b>	Belding	RUSD, Native American colleagues	O = staff time, \$1,000 incidental expenses	B, C	3rd grade RUSD students	RUSD curriculum mandates are more effectively met through partnership with MoR. Overwhelmingly positive teacher feedback. A



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Partner with RUSD for rewrite of MoR's 3rd grade history and Native American studies curriculum.						solid methodology for gauging learning impacts is developed.
<i>Status:</i>						
<b>Education:</b> Develop a plan for Nature Lab to include content for exhibition, ongoing programming, interpretive guide, branding identity. Design for drop-in use of Nature Lab.	Leland, Long	Natural history colleagues	O = staff time, <b>grant funding is possible</b>	C	All audiences.	Maintain general attendance and school/group records.
<i>Status:</i>						
<b>Education:</b> ϕ Broaden internship program with local colleges and universities; define scope of opportunities.	*Mgr. of Curatorial Services, <b>Long</b>	UCR, Cal Baptist, La Sierra, University of La Verne	O = staff time	A, B, C	University students in anthropology, biology, history	MoR is able to secure and support a minimum of two interns during any given academic year.
<i>Status: Solid growth in internship program with CBU; continuing with UCR and RCCD.</i>						
<b>Programs:</b> ϕ Implement adult program series.	*Mgr. of Curatorial Services	Director's program advisory team	O = staff time and between \$0 and \$1,000 per program in honoraria and travel expenses; <b>modest participation fee revenue</b>	C	Adult lifelong learners, ages 18 through senior	After downtown reopening, a minimum of six programs annually draw an average audience of at least 25 and average a positive response rate of at least 75%.
<i>Status:</i>						
<b>Education:</b> ◇ Engage with teachers and students to develop pre-visit and follow-up activities that reinforce program messages.	Belding, Leland	RUSD, Alvord	O = staff time	B, C	Educators, students	Digital survey results in a minimum of 75% positive response rate from teachers and students participating in Museum programs.
<i>Status:</i>						
<b>Programs:</b> ◇ Revisit Harada documentary project; develop feasible implementation plan.	Masengale	Harada House Project Team	O = staff time; <b>potential grant funding</b>	B	All audiences, including web-based	Viable and detailed implementation plan is produced, including potential costs
<i>Status:</i>						



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## Strategic Goal: EMBRACING COMMUNITY

Action	Staff point person(s)	Outside advisory / partners	Financial impact <i>O=operating C=capital</i>	Timetable <i>A=immediate B=mid-plan C=end of plan</i>	Target audience	Measurable success criteria
<b>Downtown renovation:</b> ϕ Evaluate the matrix in which the Museum will operate (Cheech, library, RAM, etc.); initiate regular schedule of evaluating collaborative opportunities in partnership with the City and the local business community.	Peterson, all senior staff	Cultural directors' consortium	O = staff time	A, B, C	All audiences	Staff are confident that they are aware of the full range of collaborative opportunities and are at the table (if not leading the discussion) for the planning of all major downtown cultural initiatives.
<i>Status: Ongoing within context of directors' consortium meetings.</i>						
<b>Community:</b> ϕ Maintain advisory networks founded in 2018 for ad hoc purposes: <ul style="list-style-type: none"><li>• renovation (until reopening)</li><li>• rebranding (until reopening)</li></ul>	Peterson	Director's design and rebranding advisory teams	O = staff time	A, B, C	Eventual post-reopening audiences	Advisory teams have been representative of the community. Input from these teams has been implemented. Teams opt to develop new goals so that they do not expire upon reopening.
<i>Status: Advisory teams continue to meet.</i>						
<b>Community:</b> ϕ ◇ Maintain advisory networks founded in 2018 for long-term, inclusive project planning: <ul style="list-style-type: none"><li>• programs</li><li>• cultural consortium</li></ul>	Peterson	Director's program advisory team, cultural directors' consortium	O = staff time	A, B, C	All general public audiences, cultural colleagues	Exhibitions and programs upon reopening are perceived as more inclusive and representative of the City. Shared program and marketing opportunities are pursued regularly.
<i>Status: Advisory teams continue to meet.</i>						
<b>Collaboration:</b> Expand botanical partnerships in City and County regional parks.	Long	Parks Department, RivCo Parks, UCR, Water district	O = staff time	C	Audiences enthusiastic about botany and parks	Mutual benefit is perceived and economies of scale are realized in the execution of programs. Popularity of museum-based website resources or pamphlets on native plants in parks, urban wildlife, can be documented.
<i>Status:</i>						
<b>Marketing:</b> ϕ Develop and use marketing and communication templates for recurring programs and events.	Mgr. of Institutional Advancement	Marketing Department, Director's rebranding advisory team	O = staff time; minor printing costs in second half of 5-year plan; revenue potential when attendance is enhanced through effective	A, B	All, including some targeted audiences (age-, program-, or site-related)	A full range of flexible templates meets with user (staff and public) satisfaction at a rate of at least 90%.

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			marketing at any fee-based programs			
<i>Status: Pending rebrand.</i>						
<b>Events:</b> Analyze participation in collaborative events such as Insect Fair; assess larger or altered role, as appropriate. Gather information on other regional events and assess for involvement.	Belding, all senior staff	Arts & Cultural Affairs, community advisory teams	O = staff time; direct project costs based on collaborative projects pursued each FY (anticipating a maximum of two per FY); potential sponsorship revenue	B, C	Target audience varied according to event theme.	Measurably improved project execution with enriched educational content. Smooth-running logistical support. Maximum public clarity regarding museum’s role (whether lead or contributing); increased attendance and media coverage.
<i>Status:</i>						

## Strategic Goal: STRENGTHENING FUNDAMENTALS

The MoR’s reaccreditation process in 2016-2018 drew attention to heightened professional expectations with regard to curatorial and education policies, community engagement, and business operations. A reexamination of all existing policies is warranted, as well as taking stock of the array of policies and statements that are expected of 21st-century museums to determine which may be relevant to develop for the MoR. While the City of Riverside is replete with policies, there remain practices specific to departments and professions that demand codification in order to aid in legal and professional compliance.

Action	Staff point person(s)	Outside advisory / partners	Financial impact <i>O=operating C=capital</i>	Timetable <i>A=immediate B=mid-plan C=end of plan</i>	Target audience	Measurable success criteria
<b>Operations:</b> Develop a suite of museum-specific administrative policies. Include an environmental policy.	Peterson, Lovell	Other City departments	O = staff time	A, B	Internal	A workable go-to document is produced that saves staff time in confirming day-to-day operational requirements. Repeat actions cease to be reinvented on each occasion.
<i>Status: Potential table of contents in development.</i>						
<b>Operations:</b> Gather, examine, revise, and develop forms and templates for recurring actions. Archive or discard obsolete documents.	Peterson, all senior staff	N/A	O = staff time	A, B	Internal	Clear and usable internal documents, old documents archived or discarded; a process well-understood by all staff for creating new forms and processes when needed.
<i>Status: Ongoing, particularly within collections.</i>						

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<b>Accreditation:</b> ◇ Submit interim report required by the American Alliance of Museums (AAM) by August 13, 2021.	Peterson, all senior staff	N/A	O = staff time; planned investments in collections storage improvements and other projects to be budgeted independently	B	Professional community	Report is submitted on time and deemed satisfactory by the AAM.
<i>Status:</i>						

## Strategic Goal: MAXIMIZING RESOURCES and STEWARDING ASSETS

The MoR’s obvious assets include its collections and sites but also comprise its staff, the City of Riverside parent organization, other funders, its history, a longstanding reputation with the public and colleagues, diverse professional networks, and its intellectual capital.

### SITES

As of 2019, the Museum of Riverside owns or occupies seven sites, four of which are historic (the Main Museum, Harada House, Heritage House, and Robinson House), but only one of which is open to the public. The goal is to ensure that MoR’s sites, collections, and records are maintained at or above standards recognized as museum best practices, and that public accessibility to them is increased strategically.

Action	Staff point person(s)	Outside advisory / partners	Financial impact <i>O=operating C=capital</i>	Timetable <i>A=immediate B=mid-plan C=end of plan</i>	Target audience	Measurable success criteria
<b>Heritage House:</b> Resolve perimeter issues: <ul style="list-style-type: none"><li>• falling block wall</li><li>• condition of fencing and gates</li><li>• trespassing signage</li></ul>	Peterson, Lovell, Masengale, Mendez		O = staff time C = fencing, gate costs TBD C = signage on parallel track with all-site wayfinding	A, B	Visitors, site volunteers	Permanent solution for falling block wall is completed by 31 December 2019. Repair or replacement of fencing and gates is priced and planned by 31 December 2020. Installation of trespassing signage is synced with museum-wide rebrand and completed at the same time as reopening of downtown site.
<i>Status: Block wall repair completed; investigating cost-effective way to screen it. Fence/gate repairs incorporated in phased site maintenance plan. All signage is pending rebrand.</i>						
<b>Heritage House:</b>	Masengale, Mendez	General Services Department	O = staff time; regularly budgeted maintenance line items	B	Internal	Development and implementation of feasible maintenance schedule and maintenance

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φ Assess all building systems; initiate improved cyclical maintenance schedule and tracking system.						tracking system, aligned with budgeting cycles, is completed by 30 June 2021.
<i>Status:</i>						
<b>Heritage House:</b> Develop proposal to include resources and conditions necessary to increase open hours at Heritage House.	Masengale	RMA, City volunteer program	O = staff time; <b>modest increased admissions / donations revenue</b>	A	The visiting public seeking historic house experiences	Delivery by 31 December 2019 of written proposal outlining conditions under which opening hours at Heritage House could be expanded.
<i>Status: Barrier is coverage, since the Museum has a precedent of relying almost solely on volunteers for program delivery.</i>						
<b>Harada House:</b> ◇ Oversee rehabilitation of Harada House, pending fundraising success by HFF and other entities.	Masengale, Peterson	Harada House Project Team	O = staff time, <b>C = seven-figure budget TBD, to be raised independently of City budgets</b>	B, C	All. Targeting Japanese-American, civil rights, local history specialized audiences in particular.	Completion of Harada House rehabilitation U.S. Secretary of the Interior Standards and industry's best practices. Site is opened to the public according to established plan. Public satisfaction with experience of the site attains at least 75%.
<i>Status:</i>						
<b>Robinson House:</b> Track CDBG-funded restoration of house.	Masengale, Peterson, Lovell	Housing Authority, developer, Harada House Project Team	O = staff time; additional historic preservation details est. \$25,000	A	Harada story audiences	Satisfactory completion of project by 1 July 2020. Smooth transition to tenant occupancy and site caretaking training in 2020.
<i>Status: Delayed by new requirement to obtain structural assessment from an engineer. RFP to upload by end of October.</i>						
<b>Robinson House:</b> ◇ Develop Harada House interpretive plan with exhibits and supporting technology to be sited at Robinson House.	Masengale	Harada House Project Team	O = staff time; interpretive features TBD and <b>potentially grant fundable</b>	B, C	All audiences, including web-based	Delivery of a feasible interpretive plan and exhibit plan for the interpretive center at Robinson House by 1 July 2020. Grant funding is sought before 1 July 2021 for full or partial implementation.
<i>Status:</i>						
<b>Main museum:</b> In advance of renovation, identify core features of significance.	Masengale, Peterson	Historic resource specialist (consultant TBD)	O = staff time; consultant fees TBD	A	Internal	Delivery of document detailing character-defining spaces and features—as they may not have been accessible for the Drisko assessment—by 30 September 2019.
<i>Status: COMPLETED.</i>						
<b>Storage facilities:</b> Prioritize tasks that will upgrade R1 and R2 environmental control standards;	Peterson, Lovell, *Collections Registrar	Consultant	O = staff time; <b>C = TBD, to seek grant funding</b>	A, B	Internal	Plan to maximize fully the R1 and R2 storage capacity completed by 30 June 2021. Cost estimates gathered for full plan implementation by 30 June 2022.

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Action	Staff point person(s)	Outside advisory / partners	Financial impact <i>O=operating C=capital</i>	Timetable <i>A=immediate B=mid-plan C=end of plan</i>	Target audience	Measurable success criteria
gather estimates and propose a phased implementation.						
<i>Status: This has been incorporated in the “Unlocking Collections” ten-year collections plan for which we are re-applying for IMLS grant support.</i>						
<b>Storage facilities:</b> For long-range planning and informational purposes, collect data and build a reference file pursuant to a future purpose-built storage facility with public access.	Peterson, *Mgr. of Curatorial Services, *Collections Registrar	Professional colleagues with similar facilities	O = staff time	C	Internal	A database of content sufficient to draft a proposal for such a facility is assembled by 30 June 2024.
<b>All sites:</b> In context of downtown site renovation, conduct an all-sites security audit and upgrade/integrate all systems and procedures.	Lovell, Kinsman, Mendez	IT, General Services departments	O = staff time; hardware and software costs TBD; downtown site costs to be part of Measure Z budget	B, C	Internal	Effective, up-to-date security surveillance systems are in place at all sites by the reopening of the downtown site.
<i>Status:</i>						

## COLLECTIONS

The Museum’s accessioned permanent collections are recorded in the following divisions: Anthropology, History, Natural History, and Archives. Per its new Collections and Exhibitions Management Policies, the Museum also maintains others levels of collection, including Community Collection, Education / Teaching Collection, Live Collection, and Library and Reference Collection.

Action	Staff point person(s)	Outside advisory / partners	Financial impact <i>O=operating C=capital</i>	Timetable <i>A=immediate B=mid-plan C=end of plan</i>	Target audience	Measurable success criteria
<b>Collections:</b> ◇ Collections assessment: <ul style="list-style-type: none"><li>• Define relevance of each sub-collection to MoR mission.</li><li>• Prepare and implement revised Collection Development Plan to align more closely with mission.</li></ul>	Peterson, *Mgr. of Curatorial Services, Focht, Masengale, Long	Collections Committee	O = staff time	A	Internal, collection donors	A serviceable document exists in initial draft by 30 June 2020 and is approved by the MMB by 31 December 2020. Curatorial staff are able to articulate concisely the scope and goals of the collections for which each is responsible.
<i>Status: Only very early drafts of some sections of the Collections Development Plan exist.</i>						

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<b>Collections:</b> ◇ Conservation projects: <ul style="list-style-type: none"> <li>• Develop long-range conservation plan.</li> <li>• Initiate regular staff training sessions on object handling.</li> </ul>	*Collections Registrar	Collections Committee	O = staff time; individual conservation project costs TBD; <i>some may be grant fundable</i>	A	Internal	A plan is adopted internally by 31 December 2019 that includes a prioritized list of objects or collections for direct treatment or rehousing. All staff receive object handling training by 31 December 2019, and new hires thereafter as part of new-hire checklist.
<i>Status: Long range conservation plan to be based on conservator's assessment from spring 2019; plan not begun yet. Content of object handling sessions under discussion, but none is scheduled yet.</i>						
<b>Collections:</b> Determine standards for nomenclature, metadata, participation in shared databases.	*Collections Registrar, all content specialists	Collections Committee	O = staff time	A, B	Internal	Clear and comprehensive data entry protocols are developed by 30 June 2022.
<i>Status: New Collections Registrar has begun this task.</i>						
<b>Collections:</b> ◇ Implement improved work and support spaces for preventative care and collection documentation in R1, R2, and downtown site.	*Collections Registrar	Collections Committee	O = staff time; costs to equip three mobile stations up to \$12,000 each, depending on photo-documentation capacity	A, B	Internal	Mobile work spaces appropriate to each site are equipped and meet staff needs. Risks to objects are dramatically reduced and the rate of efficient documentation of objects is doubled.
<i>Status: Incorporated into re-application for IMLS collections support. Will not equip the work spaces—which are identified as part of our match for this grant—until we learn late summer 2020 if we are awarded the grant.</i>						
<b>Collections:</b> φ Transition to more versatile software for collections database and donor support, to include digital visitor portal.	*Collections Registrar, Peterson, Langevin	Collections Committee, IT Department	O = staff time; data migration costs TBD; new software annual costs TBD	A, B	Internal, internet audiences	Data migration is completed and new software is in use by 31 March 2020. By 30 September 2020, a minimum of 200 of the objects / specimens historically in greatest demand are available through the visitor portal.
<i>Status: Under way. IT is reviewing agreement content. Goes to Legal next on its path toward execution. Approved for budget transfer from Personnel to Non-personnel costs to cover new software initiation and data migration.</i>						
<b>Collections:</b> Life sciences projects: <ul style="list-style-type: none"> <li>• ◇ Develop phased plan for zoology inventory.</li> <li>• Develop phased plan to resolve zoology collection storage issues.</li> </ul>	Long, Leland	Collections Committee	O = staff time	A	Internal	Feasible plans are developed by 31 March 2020.
<i>Status: Under way with Collections Registrar and Curator of Natural History.</i>						
<b>Collections:</b> Earth sciences projects:	Long	Collections Committee	O = staff time	A	Internal	Feasible plans are developed by 30 June 2020.



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<ul style="list-style-type: none"><li>Complete geology collection relocation.</li><li>◊ Develop phased plan for geology collection inventory.</li></ul>						
<i>Status: Under way with Collections Registrar and Curator of Natural History.</i>						
<b>Collections:</b> History and anthropology projects: <ul style="list-style-type: none"><li>Develop phased plan to resolve storage issues.</li><li>◊ Initiate phased inventory plan.</li><li>Initiate contact with Native American communities to advise on use of collections.</li></ul>	Focht, *Collections Registrar	Collections Committee, tribal representatives	O = staff time	B, C	Internal, professional community, regional tribal entities	<ul style="list-style-type: none"><li>A tribal advisory team is formed by 30 June 2021 that works effectively; actions the MoR takes with regard to Native American collections meet with this team's agreement.</li><li>A phased plan for all collections is in place by 30 June 2023.</li><li>Inventory is at least 25% completed by 30 June 2024.</li></ul>
<i>Status: Under way with Collections Registrar and Curator of Anthropology, who also intends to establish a Native advisory team.</i>						
<b>Collections:</b> φ Identify opportunities for participation in collaborative databases and ascertain upload protocols.	*Mgr. of Curatorial Services, content specialists, *Collections Registrar	Collections Committee	O = staff time; possible modest costs to participate in some databases	A, B, C	Academic and professional communities; general public	Selections from MoR's collections are usefully available through a minimum of two collaborative databases by 30 June 2024.
<i>Status: Most active on this front in context of UCR's pending Inland Empire Memories collaborative.</i>						
<b>Collections:</b> Develop comprehensive Heritage House site plan: <ul style="list-style-type: none"><li>◊ Inventory.</li><li>Storage plan.</li><li>Clarify philosophies regarding collections and site props.</li><li>Develop phased interpretive plan incorporating site events.</li><li>Refine existing furnishings plan.</li></ul>	Masengale	Collections Committee, RMA	O = staff time	A, B, C	Internal	<ul style="list-style-type: none"><li>Collections and props philosophy and policies are formalized by 30 June 2020; to include prop ID and tracking system.</li><li>Phased interpretive plan for recurring site events is completed by 31 December 2020.</li><li>Revised furnishings plan is completed by 31 December 2021.</li><li>Full inventory of on-site collections and props is completed by 30 June 2024.</li><li>Full inventory of off-site collections and props completed by 30 June 2024.</li></ul>
<i>Status: Under way with Curator of Historic Structures' portion of Collection Development Plan.</i>						



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## STAFF

Action	Staff point person(s)	Outside advisory / partners	Financial impact <i>O=operating C=capital</i>	Timetable <i>A=immediate B=mid-plan C=end of plan</i>	Target audience	Measurable success criteria
<b>Staff:</b> ◇ Align staffing structure with museum industry standards / best practices.	Peterson	Consultants, City HR Department	O = aspirational goal of net gain of 2.75 FTEs compared to pre-closure staffing at 16.25 FTEs	A, B, C	Internal	By reopening, staffing structure aligns with industry standards, and staff support is present for the full range of key functions (administrative, curatorial [exhibitions and collections], education/outreach, and development/advancement)
<i>Status: Inching forward. Reclassification of existing obsolete positions completed for Exhibitions Designer, pending for Manager of Institutional Advancement and Manager of Curatorial Services.</i>						
<b>Staff:</b> Develop citywide skills map in order to locate auxiliary support to MoR staff.	Peterson, all senior staff	City Departments	O = staff time	A	Internal	By 30 June 2021, staff has a user-friendly single resource to locate skills and support not present among the staff.
<i>Status: No progress yet.</i>						
<b>Staff:</b> Schedule staff development opportunities strategically, prioritizing new professionals' needs and training in support of renovation priorities.	Peterson	N/A	O = staff time; \$11,000 budgeted annually for all staff (incl. expenses); grants for new professionals to be sought	A, B, C	Internal	Staff prioritize training needs and reach consensus that greatest needs are being met. As a matter of routine, staff taking advantage of training opportunities formally report back to other staff.
<i>Status: Continuing with all-staff peer visits; next scheduled to L.A. Museum of Natural History in January 2020. Including all staff in renovation architectural planning, as the process itself is a staff development opportunity.</i>						
<b>Staff:</b> Reactivate emergency response training schedules and update toolkits.	*Collections Registrar	FD and PD	O = staff time; minor costs for upgrading dedicated response supplies and toolkits	A, B	Internal	By reopening, drills occur at least 3x/annually at all occupied sites. Updates to emergency response manuals occur annually.
<i>Status: Individual emergency kits to be distributed by end of October 2019; museum-specific emergency plan slated for full review in January 2020.</i>						
<b>Staff:</b> ◇ Implement best practices in collections care, handling, documentation, storage, staff training, and staff access.	*Mgr. of Curatorial Services, *Collections Registrar	Collections Committee	O = staff time	A	Internal	Collections access protocols are tightened by 30 September 2019. A curatorial procedures manual is in initial draft by 31 March 2020. Digital documentation protocols are developed by 30 June 2020.
<i>Status: Ongoing at more rapid pace now that Collections Registrar is on board.</i>						

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<b>Staff:</b> ϕ Provide high-quality customer service training to all staff.	Peterson	Director's advisory rebranding team, possible consultant	O = staff time; possible consultant TBD	B	All, especially on-site audiences	All staff receive training and exemplify model visitor-centered service by reopening of downtown site.
<i>Status:</i>						

## SUSTAINABLE OPERATIONS

Sustainability means more than ensuring that MoR’s financial needs are aligned with its resources and the Museum’s mission. Sustainability includes environmental and cultural concerns as well. To adopt a well-known and widely adopted definition of the concept, the MoR embraces an interpretation that “meets the needs of the present without compromising the ability of future generations to meet their own needs.”<sup>1</sup> The MoR has a long history of respect for cultural diversity, which will be further developed along with a more forthright embrace of environmentally sustainable operational choices. In the spirit of integrating sustainable choices with all operations, note that development of sustainability-related policy statements is noted in other sections.

Action	Staff point person(s)	Outside advisory / partners	Financial impact <i>O=operating C=capital</i>	Timetable <i>A=immediate B=mid-plan C=end of plan</i>	Target audience	Measurable success criteria
<b>Financial management:</b> ◇ Implement detailed budgeting by project, with functional team leaders accountable for working to budgets.	Peterson, Lovell	Finance Department	O = staff time	A	Internal	By 30 June 2020, all staff demonstrate an understanding of the entire museum budget, and understand accountability for assigned portions of it, as linked to program deliverables.
<i>Status: Detailed budget for 2019-2020 prepared internally; will serve as basis for still more precise planning for next biennium.</i>						
<b>Staff:</b> ϕ ◇ Create new team dedicated to fundraising (sponsorships, grants, events, annual fund development).	Peterson	CMO’s office	O = creation of 1-3 FTEs, some of which are unfunded as of 1 July 2019; <b>entire team designed to be net revenue-positive</b>	A, B	Philanthropic community	Staff incrementally come on board as ramp-up to reopening approaches. Manager of Institutional Advancement by 30 June 2020. Additional hires in FY2021-2022, timed in advance of reopening date.
<i>Status: Pending approval of appropriate position(s).</i>						
<b>Board:</b> ◇ Develop the advocacy capacity of the Metropolitan Museum Board (MMB). Institute new board member orientation.	Peterson	Board Development Committee	O = staff time	A, B	MMB	MMB evolves into an indispensable source of community contacts and becomes an active conduit for upbeat communication about the Museum in the community.
<i>Status: Board Development Committee is at work on a much more comprehensive orientation reference for board members. Advocacy now codified as part of the Board’s standing rules.</i>						

<sup>1</sup> From *Our Common Future*, also known as the Brundtland Report, 1987.

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<b>Fundraising:</b> ϕ ◇ Develop comprehensive fee schedule to maximize earned revenue.	Peterson, *Mgr. of Institutional Advancement	CMO, Finance Department, Council	O = staff time (expense); fee revenues may be notable if full proposal is approved / implemented	A, B	All	By reopening, fair and reasonable fees are assessed for services, with a mechanism to track and credit this revenue to the Museum Department. Market-value private services, such as facility rentals, are managed to the satisfaction of Museum staff and without risk to collections or facilities.
<i>Status: New fee schedule exists in draft.</i>						
<b>Fundraising:</b> ϕ ◇ Develop a “donor circle” support program that does not compete with the RMA’s membership program.	Peterson, *Mgr. of Institutional Advancement	RMA	O = staff time (expense); donor revenue when fundraising team staffed	B, C	Philanthropic community	Revenues are generated in support of exhibitions and programs that offset at least 25% of anticipated exhibition cost increases compared to pre-closure costs.
<i>Status:</i>						
<b>HHF, fundraising:</b> Support Harada House Foundation, in accordance with MOU. Assist in developing and managing fundraising campaign.	Peterson, *Mgr. of Institutional Advancement	HHF	O = staff time; revenue raised by HHF is restricted to Harada House	A, B, C	Harada story audiences	HHF has the tools it needs without delay from the Museum to pursue its goals. Fundraising campaign advances steadily toward incremental goals.
<i>Status: HHF is expected to approve its campaign goal and tiers in October 2019.</i>						
<b>RMA, fundraising:</b> Streamline practices re: annual financial support and the management of program expenses.	Peterson, Lovell	RMA	O = staff time; RMA revenue annually of \$15,000-25,000 to restart after reopening	A	Internal, RMA	Annual budgets are developed in sync to ensure that the Museum’s necessary expenses are in the Museum’s budgets, and that program expenses are delineated clearly between the Museum and the RMA.
<i>Status: Since grant request prepared for 2019-2020, but piecemeal approach of prior years overwhelmed the process. Not giving up.</i>						
<b>RMA and Board, advocacy:</b> ◇ Formally encourage closer communications and alignment between RMA and Metropolitan Museum Board (MMB).	Peterson	RMA	O = staff time	A, B, C	RMA, MMB	Mutual awareness of the RMA’s and MMB’s activities is notably increased.
<i>Status: Ongoing.</i>						
<b>RMA, volunteers:</b> ◇ Reexamine, update, enrich volunteer corps training, scheduling, and communications. Develop ongoing menu of volunteer opportunities.	Peterson, Masengale, Belding, Kinsman	RMA	O = staff time	A, B	Current and prospective volunteers	Implementation of updated volunteer training program and volunteer guidelines.

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<i>Status: Ongoing; incremental introduction of change will be necessary with the volunteers.</i>						