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# San Diego Natural History Museum Strategic Planning Project

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SAN DIEGO  
NATURAL  
HISTORY  
MUSEUM



STRATEGIC PLANNING PROJECT  
MAY 2009

**University of San Diego Consultants:**

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# EXECUTIVE SUMMARY

## Introduction

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In January 2009, a team of students from the University of San Diego's (USD) Nonprofit Leadership and Management conducted a pre-planning exercise to help prepare the San Diego Natural History Museum (SDNHM) for its 2012-2022 strategic plan. With an annual attendance last year of more than 600,000 visitors, the Museum is one of the largest cultural institutions in Balboa Park. The consulting team engaged in an extensive discovery process, including a review of the Museum's current strategic plan<sup>1</sup> and preliminary key informant interviews. The results of this discovery process pointed towards a number of themes from which, three key strategic questions were identified and pursued. The consulting team conducted a three-phase process including: review, discovery/analysis, and conclusions /recommendations.

## Key Strategic Questions

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Drawing upon the results of the review phase, the following *Key Strategic Questions (KSQ)* were generated:

**KSQ1:** How can the Museum best position itself to be a valued resource to the community in the face of changing regional demographics and social trends?

**KSQ2:** How can the Museum achieve long-term financial stability despite the fluctuation of economic trends?

**KSQ3:** How can the Biodiversity Research Center of the Californias (BRCC) research programs address the key environmental issues that are most relevant to the region upon which the Museum's mission is focused?

# RESEARCH, TOOLS, METHODS AND RATIONALE

## Introduction

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To inform KSQ1, the team chose a trend analysis tool to collect data. The tool allowed the team to examine changes in the marketplace and provide insights about the future audiences of the Museum, how these audiences will get information, and what type of information they may find relevant. To address KSQ2, it was crucial to understand the current capacity of the Museum's staff, infrastructure and operations. The consulting team conducted an internal management audit using the Elements of an Effectively Managed Organization (EEMO<sup>2</sup>™). The team conducted an extensive series of key informant interviews, to gain more insight about the Museum's research and how it fits with the current environmental concerns in the Southern California and Baja California

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<sup>1</sup> See Exhibit C

regions. Though a primary planning tool was identified for each KSQ, the consulting team carefully evaluated all the information received from all tools during the discovery phase. After the discovery phase, the consulting team integrated trend data from each tool during the formulation of KSQ conclusions and recommendations.<sup>2</sup>

## Study Methodology

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Following the selection of the tools above, the subsequent steps were taken to gather data, analyze and organize findings:

### **Key Strategic Question #1(KSQ1): Positional Map – The consulting team’s decision to choose a positional map to inform KSQ1 was based on a number of factors:**

- Our first informational interview with Michael Hager, the CEO of the Museum, pointed immediately to cultural and social media trends and shifts within the museum-attendee community. He referred us to a document that furthered our research and decision-making process, *Museums and Society 2034: Trends and Potential Futures*.
- The 2034 report was published in December, 2008 by the Center for the Future of Museums and outlines two aspects included in KSQ1, changing demographics and how technological shifts have impacted the relevance of museums to the community.
- The Museum’s Board was engaged in a similar discussion, regarding the viability of social media efforts for the future of the institution. It became clear that social media was the path that our group would use to further inform KSQ1 for the Museum to consider for the 2012-2022 strategic plan.
- We checked in with the Museum to verify that the three questions were appropriate, and the social media research was a relevant approach to deliver valuable data to the Museum’s strategic planning committee. The Board and the CEO were very supportive of our approach and pleased that we had identified a highly relevant issue to research.
- Based upon the sequence of data collected and needs identified above, we determined that research should be done to illustrate the San Diego Natural History Museum’s position within the social media community – among peer institutions and the relevance or need for social media for current SDNHM patrons. We chose the positional map tool to illustrate our data, since many of the

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<sup>2</sup> See Exhibit E

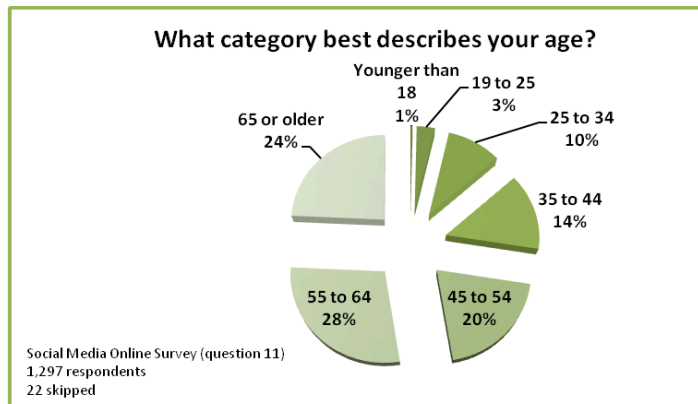
factors we were analyzing had geographic, demographic and positional marketing trend implications.

- We continued to research social media trends within and outside the nonprofit sector and museum communities to ensure that our data collection was thorough.
- The information we gathered from peer institutions also helped us focus our efforts on specific social media outlets, in our positional mapping and surveys.

### Positional Map Elements

To fully understand the Museum’s position in the community with regard to the use of social media, we conducted three surveys and an analysis of 10 peer institutions nationwide.

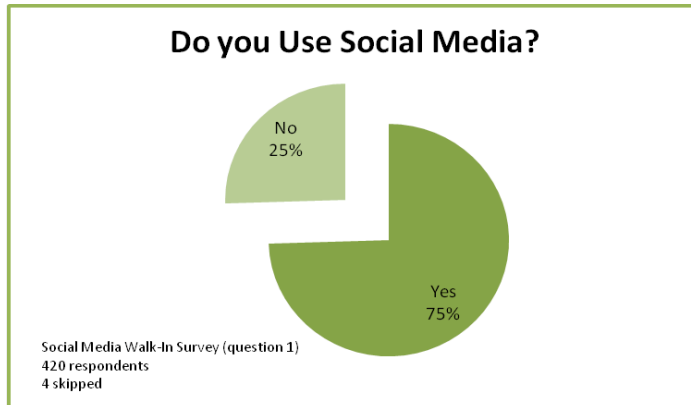
- San Diego Natural History Museum Social Media Survey (RSS version) – Located in the really simple syndication (RSS) section of the Museum’s homepage, the survey elicited answers to seven questions including: social media use, gender, age and the survey taker’s location. The survey was posted to the RSS feed on April 7, and remained active until April 20. We recognized that the participation in the RSS survey was low with only 16 respondents, so we considered a more direct approach to gathering the data.<sup>3</sup>
- San Diego Natural History Museum Social Media Survey (Survey Monkey version) – When the results of the opt-in RSS survey indicated low participation, we dispatched a Survey Monkey via email to 35,137 Museum subscribers. The email was opened by 10,702 people (30.4%), 2,038 clicked on the link (19.4% of those who opened the email), 1,319 people completed the survey (64.7% of those who clicked on the link). The Survey Monkey was a replica of a survey that the Museum had designed prior to our research. We used the Museum’s survey to gather more data for the Museum; the first administration, embedded in a monthly e-newsletter, yielded few responses. This survey consisted of 16 questions, 10 were content driven and the remaining six sought demographic and patron information. There was one open-ended question, answered by every



<sup>3</sup> See Exhibit G

respondent. The survey was dispatched on April 13 and was closed on Wednesday, April 15 at 7:30pm.<sup>4</sup>

- San Diego Natural History Museum Social Media Survey (Walk-in version) – In addition to the web-based surveys we identified that a valuable group of respondents are those who patronize the Museum. On April 13, Guest Services



aided in the administration of a paper survey that consisted of the same questions as the original RSS survey, with one exception: the survey pointedly asks the patron, “How would you like to interact with the San

Diego Natural History Museum after you leave today?” We received 424 responses to the survey. Upon receipt of the paper surveys the team entered the data into the Survey Monkey tool for analysis. The survey closed on Tuesday, April 21.<sup>5</sup>

- Analysis of peer institutions – Using the American Association of Museums as a guide, we identified 40 entities with attendance between 300,000 - 700,000; falling into a like range with the San Diego Natural History Museum, depending on exhibition schedules. After attendance, we chose budget as a secondary factor to determine peer institutions for our research. However, comparing budgets with outside institutions proved to be difficult, since fiscal schedules and operating standards were inconsistent from place to place. We zeroed in on ten institutions that most closely aligned with the SDNHM.<sup>6</sup>
- Additional research – To accurately map the San Diego Natural History Museum’s position, we needed to determine what the landscape looks like and where like institutions are headed. In addition to the data collected for our positional map, we continued to research the existing relevance, application and opportunity for social media in the museum community.

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<sup>4</sup> See Exhibit H

<sup>5</sup> See Exhibit I

<sup>6</sup> See Exhibit F

**Key Strategic Question 2 (KSQ2): Internal Management Audit – The following factors led the consulting team to choose both an internal management audit and key informant interviews to inform KSQ2:**

- The data collected primarily in worksheet 3 of the Strategic Planning Update, indicated that more research should be done in the area of the Museum’s long-term financial stability. The Museum’s 2002-1012 strategic plan indicated substantial endowment growth, which has not yet occurred.
- The consulting team interviewed the Museum’s CEO, Michael Hager, and the Museum’s Vice President of Institutional Advancement, Janet Redding, prior to choosing a strategic planning tool to further inform KSQ2.
- We recognized that researching the long-term financial stability of the Museum was an enormous undertaking. Instead of conducting a financial audit, our team chose to identify some trends and opinions about the Museum’s economic status and management capacity.

**Internal Management Audit Elements**

To learn more about the Museum’s financial climate, opinions and practices, the consulting team conducted an internal management audit as the primary strategic planning tool and key informant interviews as a secondary tool.

- The Elements of and Effectively Managed Organization (EEMO<sup>2</sup>™) stood out as an applicable tool for two reasons: it measured the perceptions of management, board and staff and it was equipped to inform additional questions about how the Museum is managed. When we tailored the survey (administered via Survey Monkey) to the San Diego Natural History Museum, we also customized the Survey Monkey to direct the Board, staff and executive staff, to survey questions that were germane to the respondent’s relationship with the Museum.<sup>7</sup>
- The survey had three permutations: one for the Board (20 members), staff (152 members) and executive staff (22 members). 57 people took the survey (29% of people surveyed), 7 board members (35% of board, 12% of total respondents), 27 staff members (18% of staff, 47% of total respondents) and 14 executive/senior staff members (70% of executive/senior staff, 25% of total respondents).
- The survey was emailed directly to the Museum staff and Board on March 23 and remained active until April 15. A final reminder was sent on April 14, eliciting 19 additional responses before the survey closed.

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<sup>7</sup> See Exhibit J



- A Board self-assessment, conducted on March 20, 2009, was used to measure the Board's understanding of their role within the organization, the effectiveness of that role and their level of fundraising involvement at the Museum. Finally, the Board was surveyed on their perceptions regarding the organizational composition of the Museum.<sup>8</sup>
- In addition to using EEMO<sup>2</sup> responses and the Board assessment to address our financial stability question, we decided to conduct a series of key informant interviews, to expand upon and define the data we were collecting.

**Key Strategic Question 3 (KSQ3): Key Informant Interviews – The factors that led us to choose key informant interviews as a primary tool for KSQ3 and the EEMO<sup>2</sup>™ survey as a secondary tool are as follows:**

- The Strategic Planning Update illustrated the depth and breadth of the Biodiversity Research Center of the Californias (BRCC) work within the realm of the SDNHM.<sup>9</sup>
- The importance of the BRCC to the Museum's mission and operations drove the consulting group to focus more closely on the BRCC.
- A preliminary interview with the Museum's CEO Michael Hager indicated that more research should be done regarding the BRCC's focus.
- A slate of key informants was identified, inclusive of internal and external experts.<sup>10</sup>

**Key Informant Interview Elements**

- We recognized that interviewing Museum staff members and community partners could identify issues impacting the BRCC.
- Development of questions used by the consulting group was informed by a preliminary interview with SDNHM's CEO, a review of the BRCC's mini-strategic plan and the existing research programs of the Museum.
- We identified Museum staff involved with BRCC research and administration. We also chose community experts who could identify key environmental concerns related to the research conducted by the BRCC.

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<sup>8</sup> See Exhibit K  
<sup>9</sup> See Exhibit B  
<sup>10</sup> See Exhibit A

# FINDINGS AND CONCLUSIONS

## SWOT Analysis: Key Strategic Question One (KSQ1)

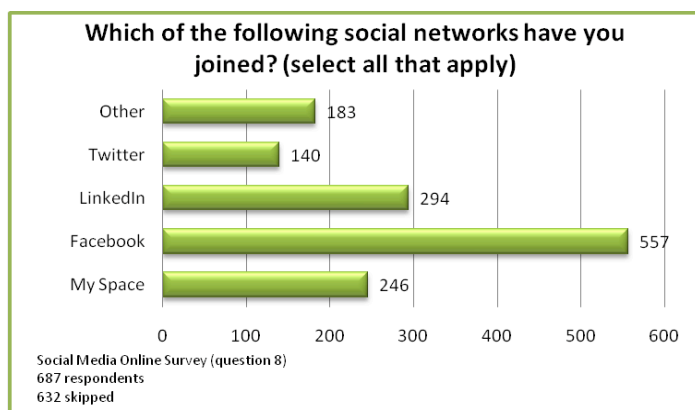
Strengths	Weaknesses
<ul style="list-style-type: none"> <li>❖ 97% of those surveyed (1,115) currently use the Museum’s website and 81.1 % (out of 687) respondents are on Facebook.(Social Media - Online Survey version)</li> <li>❖ Museum attracts 1.5 million unique web visitors per year.(Per SDNHM Google Analytics)</li> <li>❖ The technology infrastructure was very strong or seen as an “asset” by 97.7% of respondents (44 of 45).(EEMO<sup>2TM</sup>)</li> <li>❖ 80% (36 of 45) perceived the Museum’s website as an asset.(EEMO<sup>2TM</sup>)</li> <li>❖ Presence on Facebook, Twitter, You Tube, E-News and RSS subscription.(Social Media Survey of Peer Institutions)</li> <li>❖ The Museum has 268 Facebook friends which ranks them the 6th (out of 11 like institutions) in terms of Facebook friend/fan count.(Social Media Survey of Peer Institutions)</li> </ul>	<ul style="list-style-type: none"> <li>❖ Museum currently lacks the personal resources to create content and monitor it within the social media realm.(Key Informant Interview)</li> <li>❖ Museum lacks strategy for the use of social media.(Key Informant Interview)</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>❖ 63% of respondents (444 total) indicated that they would like to interact with the Museum in additional ways via the website (i.e. Reference botanical information, watch video clips, make purchase, view virtual exhibits).(Social Media – Walk-in version)</li> <li>❖ Social media, particularly Facebook, may provide marketing opportunities for the Museum.(Key Informant Interview)</li> <li>❖ 72% of 399 Respondents indicated an interest in interacting with the Museum via the web.(Social Media - Online Survey version)</li> <li>❖ 74.5% of respondents use social media (313 out of 430).(Social Media - Online Survey version)</li> <li>❖ Museum has access to “real time” on-going feedback.(Key Informant Interview)</li> <li>❖ The Museum can monitor what is happening in cyberspace and can be proactive in soliciting feedback through social media.(SDNHM Rankings on Social Media Review Websites)</li> </ul>	<ul style="list-style-type: none"> <li>❖ Pitfall: Anyone can associate info with the Museum, but the Museum cannot control it, i.e. Yelp.(SDNHM Rankings on Social Media Review Websites)</li> <li>❖ Information (negative or inaccurate) is disseminated broadly and quickly and can remain online for undetermined periods of time.(SDNHM Rankings on Social Media Review Websites)</li> <li>❖ Museum not consistently receiving high ratings in cyberspace (Average 3 out of 5 stars).(SDNHM Rankings on Social Media Review Websites)</li> </ul>

## Narrative Description of SWOT Analysis for KSQ1

### Strengths

When our research led us to further investigate social media on behalf of the Museum, the consulting team recognized that we needed to gather information to inform the viability of a social media strategy. In an online survey sent to 35,137 Museum subscribers, 10,702 people opened the email and 1,319 people completed the survey. Before we began reviewing the survey responses the consulting team recognized the large response rate as a strength.

As we looked at the details of the online survey, we learned that 97% of those surveyed currently use the San Diego Natural History Museum's website. Data collected from the EEMO<sup>2</sup>™ indicated that 80% of staff and Board thought the SDNHM website was an asset. A strength of the Museum is their ability to attract 1.5 million unique visitors to their website each year.



While the website feedback was valuable, we also learned that 81.1% of respondents to our online survey are also current Facebook users. The Museum had already identified Facebook as an important outlet for social interaction and currently has set up a presence on this particular virtual space. In an environmental scan of like institutions<sup>11</sup>, the Museum ranked 6<sup>th</sup> out of 11 surveyed, with

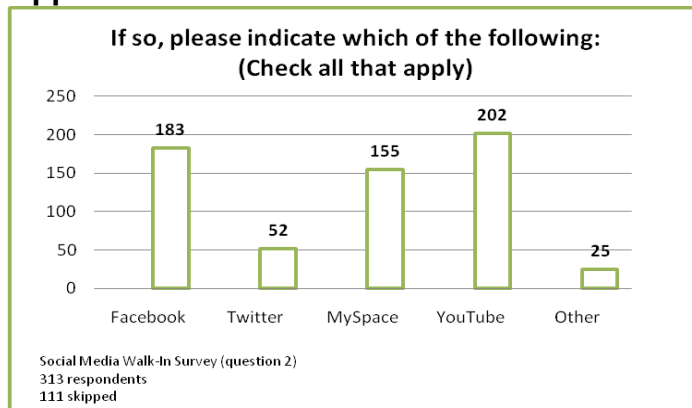
268 Facebook "fans". The survey results are a strong indication that the Museum has positioned itself on a virtual space (Facebook) where there is a high likelihood of engaging with its constituencies. In addition to Facebook, the Museum has already set-up a presence on Twitter (750 followers) and YouTube, adding to their existing RSS subscription and e-newsletter (35,137 subscribers).

### Weaknesses

The Museum currently lacks the resources to create content and to monitor the social networks on a large-scale. Although time and energy have been dedicated to creating some social networks, the Museum does not have policies and procedures in place to guide the usage of social media by the Museum as an institution nor its staff as participants. The delicate guidelines that surround research and discoveries at the Museum are of particular concern; according to our internal key informant interview the Museum also lacks a dedicated social media strategy, leaving the maintenance and future of social media unclear.

<sup>11</sup> See Exhibit F

## Opportunities



The online survey presented two opportunities through the analysis of responses given by constituents of the SDNHM. With 63% of 444 total respondents indicating that they would like to interact with the Museum in additional ways via the website, the Museum has a real opportunity to engage. They would like to reference information such as botanical and insect catalogs, watch

educational video clips and view virtual exhibits. Secondly, the online survey indicated virtual social spaces, particularly Facebook, may provide marketing opportunities for the Museum. The walk-in survey indicated an impressive 72% of 399 respondents said they too, had interest in interacting with the Museum online. Furthermore, 74.5% of 430 respondents indicated they currently use social media. An internal key informant interview spoke to two key points that indicated opportunity to the consulting team. The first was the Museum's feedback loops.

*"I think it is important to ask your constituents what they want."* – Key informant interview comment

Currently the Museum deploys surveys to its constituents to allow them the opportunity to weigh-in on services and programs being offered. These feedback loops are important as they provide real-time feedback for the Museum. The second were comments pertaining to the ability of Museum to use the internet to monitor what is happening in cyberspace and responding to the issues that arise by proactively soliciting feedback through social media.

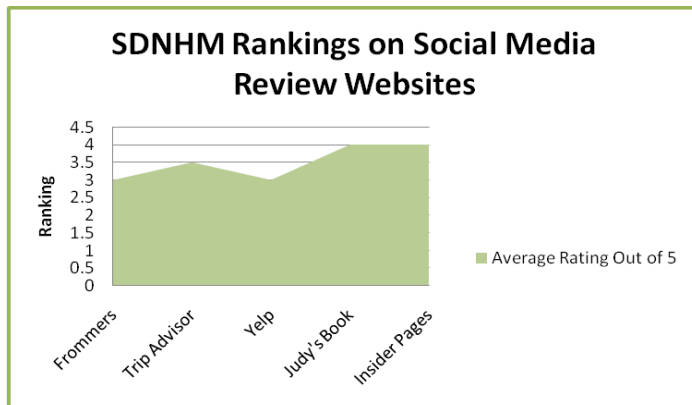
*"We should be monitoring it and be proactive. The Museum is very open to looking at social media and how to use it effectively."* – Key informant interview comment

## Threats

After reviewing data from each tool utilized to inform KSQ1, two tools provided information that spoke to the threats presented by social media and its potential effect on SDNHM. An internal key informant interview touched on the threat posed by the internet's open system.

*"Social media is all about people and you have to realize there are people behind the profiles. It is an interesting that there is a grey line because you want to have one consistent voice and you want to be careful how your personal life intertwines with your business."* – Key informant interview comment

While cyberspace is an excellent place to communicate information, the information being posted may not necessarily be accurate and can be associated with an organization even though it may not be true. This poses a threat the Museum, as there is not a way to control what is being posted in cyberspace.



A quick environmental scan of online review sites indicated the SDNHM was rated on several sites. Some ratings and comments posted were negative and/or inaccurate. This information is easily accessible to prospective and current Museum constituents. It has the ability to disseminate information broadly and

quickly and can remain online for undetermined periods of time. Additionally it was noted through the scan the Museum is not consistently receiving high ratings on online rating sites; currently the Museum is averaging 3 out of 5 stars.

## Key Findings for KSQ1

Based on the information gathered primarily through elements of a positional map<sup>12</sup>, the following conclusions for KSQ1 were made by the consulting team:

1. Museum patrons are aware of and participating in social media communities. Survey respondents indicated that they would like to interact with the Museum through social media, creating a space in the market.
2. The Museum's existing website is perceived as a trusted resource for information, pertaining to the Museum's operations and research.
3. Exploring and engaging in social media opportunities may also provide revenue-generating avenues through online product sales and advertising.
4. The Museum's current financial state will not support the staffing necessary for a large-scale, well-maintained social media effort.
5. Social media's "real time" information dissemination capacity presents some challenges in comparison to the Museum's strategic approach to releasing research findings and news.

<sup>12</sup> See Exhibit E

## SWOT Analysis: Key Strategic Question Two (KSQ2)

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>❖ The Board is an effective watchdog.(Key Informant Interview)</li> <li>❖ 10 of 13 Board Members see fundraising as very important.(Board Self Assessment)</li> <li>❖ 59% (13 out of 22) perceive the Museum as having an effective budgeting process, including a program-centered approach to budgeting.(EEMO<sup>2TM</sup>)</li> <li>❖ 61.8% (34 out of 55) believe the Museum's strategic plan highlights core programs and organizational strategies are in place that guide the allocation of its resources.(EEMO<sup>2TM</sup>)</li> <li>❖ Majority of respondents show high level of confidence for Museum's business operations to carry out the research and education mission.(EEMO<sup>2TM</sup>)</li> </ul>	<ul style="list-style-type: none"> <li>❖ The Board is not effective in fundraising.(Key Informant Interview)</li> <li>❖ Board has little involvement with fundraising.(Board Self Assessment)</li> <li>❖ 43% of the Board and 33% of staff perceive fund development as a weakness.(EEMO<sup>2TM</sup>)</li> <li>❖ 50% (11 of 22) perceive the Museum's long-term fundraising plan to be a weakness.(EEMO<sup>2TM</sup>)</li> <li>❖ 81.8% (18 out of 22) perceive the Museum as not having sufficient resources to sustain itself for the immediate future.(EEMO<sup>2TM</sup>)</li> <li>❖ 40.9% (9 out of 22) perceive staff and board resource development roles and responsibilities are not clear; people lack the necessary fundraising skills; and distribution of work is not effective in getting the work of fund development accomplished.(EEMO<sup>2TM</sup>)</li> <li>❖ 82.2% (37 out of 45) perceive the Museum's employee benefits and paid compensation are not competitive for the positions and relevant market(s).(EEMO<sup>2TM</sup>)</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>❖ Potential donors – younger, wealthy...need to be educated and cultivated.(Key Informant Interview)</li> <li>❖ Senior staff need to make rounds within the philanthropic community-attending events, etc.(Key Informant Interview)</li> <li>❖ The Board is requesting education and training in area of fundraising.(Board Self Assessment)</li> <li>❖ 74.5% (41 out of 55) perceive that the Museum advances its goals and expands its influence through working collaboratively with other groups.(EEMO)</li> <li>❖ 76.3% (42 out of 55) perceive the Museum's use of media coverage to be an asset.(EEMO<sup>2TM</sup>)</li> </ul>	<ul style="list-style-type: none"> <li>❖ Total foundation corpus is smaller compared to other CA cities (Key Informant Interview):  <u>Assets:</u> San Diego: 2.3 billion, L.A.: 34.7 billion, San Francisco: 31.3 billion.(Source: Fall 2008 Grant-making Report, SOLES, USD)</li> <li>❖ Potential Museum donors are flying under the radar of the Museum.(Key Informant Interview)</li> </ul>

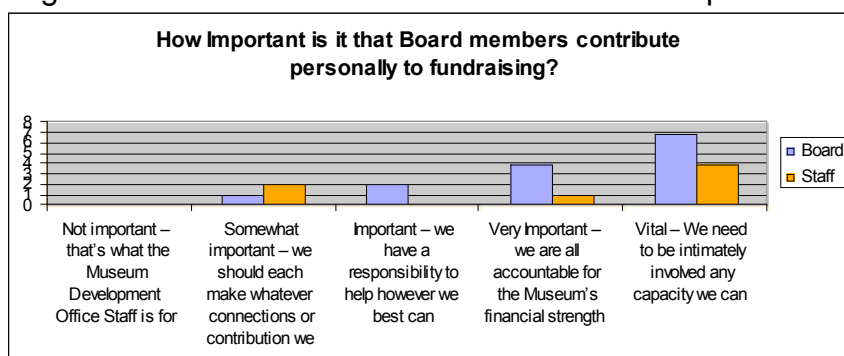
## Narrative Description of SWOT Analysis for KSQ2

### Strengths

Two strengths that the consulting team identified through the data collection included an interview subject who identified the Board as effective “watchdogs” of the San Diego Natural History Museum’s financial resources.

*“The Board asks a lot of questions about projected costs and revenues when considering special exhibitions (and these exhibits raise the visibility of the museum which has positive impact on future revenue).”* – Key informant interview comment

In a self-assessment the Board indicated that they see the importance of fundraising for the institution. The internal management audit (EEMO<sup>2</sup><sup>TM</sup>) data indicated that 59% of respondents think the Museum has an effective budgeting process, including a program-centered approach to budgeting. The audit further indicates that 61.8% of respondents believe that the existing strategic plan highlights core programs and that there are strategies in place that guide resources toward the programs. There was also a high confidence rating for the Museum’s business operations to carry out the research and education mission.<sup>13</sup>



### Weaknesses

In a self-assessment and a key informant interview, the Board was identified as being less involved and effective with fundraising than desired. Similarly, the internal management audit indicated that the Board and staff both perceive the Museum’s fund development as a weakness. More so, the audit goes on to reveal that 50% of respondents also think that the Museum’s long-term fundraising plan is a weakness. As a result, the data shows 81.8% of respondents think that the Museum does not have sufficient resources to sustain itself in the immediate future.

The internal management audit indicates the Board and staff may lack confidence in the Museum’s fundraising and fiscal strengths. The audit showed that 41% of those surveyed believe there is a lack of clarity and skill in the fund development area.

Another more general concern also emerged from the internal management audit. From an operational standpoint, the data show that 82.2% of respondents do not think that the

<sup>13</sup> See Exhibit J

Museum salaries and benefits are competitive for the position or the market. While such complaints are commonplace when asking employees about compensation, the fact that the Museum recently enacted pay reductions gives additional credibility to this concern.

## **Opportunities**

In a key informant interview, the consulting team learned that there are a host of opportunities within the San Diego philanthropic community. Young, wealthy, prospects are in the area, lending the Museum the opportunity to educate and cultivate them as donors. One way to access new donor prospects for the pipeline is to meet and interact with them at community events.

Volunteers represent another opportunity for development, although one of the key informants suggested the Museum may need to play catch-up in cultivating individuals who have volunteered for a long period of time.

*“We have a narrowly appealing mission. Second, there have been decades of neglect regarding stewarding our volunteers for planned giving. We need to nurture volunteers on a long-term basis.”* – Key informant interview comment

Another opportunity for the Museum is the interest that the Board has in learning more about fundraising through education and training. 74.5% of respondents to the internal management audit perceive the Museum as an entity that makes strides through its partnerships and collaborations with other entities. Finally, 76.3% of respondents considered the Museum’s use of the media to be an asset.

Although they are disjointed, this data paints an optimistic picture for the Museum, especially since one of the weaknesses of the institution, is directly addressed as an opportunity—the Board’s fundraising abilities.

## **Threats**

In a key informant interview, there were a number of concerns uncovered regarding fundraising in the San Diego community. One of the largest concerns referenced the recent findings in the Fall 2008 Grantmaking Report released by the Caster Family Center for Research and the San Diego Grantmakers. The report cites that San Diego has about \$2.3 billion in total assets while neighboring Los Angeles County has \$34.7 billion in total assets. This information creates a donor capacity model that is not conducive to the demand of nonprofit organizations in San Diego County.

A key informant also indicated that there are a number of donors who moved from outside of the region, and whose donor loyalty resides in their place of origin. These individuals may have come to San Diego to retire and are “flying under the radar” outside of the San Diego philanthropic community.



*“One challenge is rebuilding the Museum’s reputation among funders. The Museum has a smaller corpus than an institution of its size and age. There is also a less vibrant corporate community and that adds to a less robust upper and middle class. (Hour glass shaped structure with WAY more of a bulge on the lower side). This model leaves the burden on the wealthy individuals to carry the load for the arts community.” – Key informant interview comment*

## **Key Findings for KSQ2**

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Based on information gathered primarily through elements of the internal management audit, the following conclusions for KSQ2 were made by the consulting team:

1. The Museum’s endowment is inadequate for the size and age of the institution.
2. The Board is not adequately engaged in fundraising, but recognizes its importance.
3. San Diego Region’s philanthropic assets are far less than that of Los Angeles and San Francisco
4. There is a high level of confidence for Museum’s business operations by board and staff.
5. The Museum is viewed as being highly collaborative by Board and staff.
6. San Diego has a small pool of high-level donors resulting in a highly competitive fundraising environment.

## SWOT Analysis: Key Strategic Question Three (KSQ3)

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>❖ Atlas projects: valuable resource for the community and a model for other parts of the country.(Key Informant Interview)</li> <li>❖ 90% of respondents see the Museum's collections as an asset &amp; a strength.(EEMO<sup>2TM</sup>)</li> <li>❖ Historical continuity within region: past, present &amp; future (Key Informant Interview)</li> <li>❖ The Museum has accurate, scientific, regional data.(Key Informant Interview)</li> <li>❖ 75% of respondents said there is significant enthusiasm for BRCC's research.(EEMO<sup>2TM</sup>)</li> <li>❖ 71% respondents believed BRCC research programs had strong relevance, are high quality, and are making a difference in the community—many key informant responses reinforced this data.(EEMO<sup>2TM</sup>)</li> </ul>	<ul style="list-style-type: none"> <li>❖ Although 76% respondents believe the Museum has good media coverage, 42% believe there is a weakness in building stakeholder awareness. This sentiment was reinforced by some key informant interviews.(EEMO<sup>2TM</sup>)</li> <li>❖ The ability to engage mission-driven research is being impacted by contract work that addresses financial needs.(Key Informant Interview)</li> <li>❖ Lack of ecologist in the BRCC may be resulting in missed opportunities that tie the various research disciplines together.(Key Informant Interview)</li> <li>❖ Mineralogy and marine invertebrates are un-curated.(Key Informant Interview)</li> <li>❖ Science departments lack support to help with the “business side” of contract work.(Key Informant Interview)</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>❖ Coastal ecology research.(Key Informant Interview)</li> <li>❖ Marine invertebrates research.(Key Informant Interview)</li> <li>❖ Research partnerships with universities and government agencies that could generate grant-funded research that is aligned with Museum's mission.(Key Informant Interview)</li> <li>❖ Funding for research related to impact of climate change in regional plant and animal species.(Key Informant Interview)</li> </ul>	<ul style="list-style-type: none"> <li>❖ A highly competitive fundraising environment is making it more difficult to acquire grant support from federal agencies and private foundations.(Key Informant Interview)</li> </ul>

## Narrative Description of SWOT Analysis for KSQ3

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### Strengths

Of the 12 individuals who participated in key informant interviews about the BRCC, whether internal or external, all but one indicated the strong expertise and local in-depth knowledge of the scientific staff. The Museum's research collections, which total more than 8.5 million specimens, were also acknowledged as a key strength to support environmental research and conservation work in the region of southern California and Baja California in 11 of 12 interviews. The Bird Atlas (as well as other Atlas projects such as the plant atlas and the mammal atlas) was cited by nine interviewees as a highly valuable resource of the BRCC that has and will have great applications for land use and management decisions. One individual indicated that he was not familiar enough with the BRCC to indicate its strengths. The longevity of the Museum and its collections (135 years) was considered an important asset by all the staff scientists, two Board members and three of the four external environmental professionals. This is best explained by one of the curators who said,

*“Our collections allow us to look back, giving us a perspective on the recent and distant past. These are the starting points for conservation efforts.”* – Key informant interview comment

When looked at from the perspective of a competitive lens, the age, size and quality of the Museum's research collections is unrivaled. There is no other institution in region (probably in the world) with a body of knowledge focused on southern California and the peninsula of Baja California comparable to that of the Museum.

Several questions contained in the internal management audit provided additional insights regarding the Museum's research division. 75% of those responding to the audit indicated a great deal of enthusiasm for the Museum's research. However, nearly 10% said they “did not know,” indicating a lack of awareness. Approximately 15% of those responding felt there should be greater enthusiasm. Nearly three out of four respondents believed the Museum's research was highly relevant and made a difference in the community.

*“The Museum's field work and scientists are a major strength--tying environmental issues to the real world. The Museum is scientific, collaborative, and involved in its community. They tie their work into education.”* – Key informant interview comment

85% of the staff and Board also believe the Museum is respected by its peers in its field for being well-run, conducting high-quality and innovative research programs that meets the needs of its constituencies. 11.5% of the respondents said they did not know, again showing the possible need for stronger internal communication.

## Weaknesses

Through the internal management audit we learned that a majority of the scientists interviewed (4 out of 5) were very concerned that contract work that was important for generating income was dominating the time and efforts of BRCC staff. They felt this directly and significantly impact the ability to carry out mission-driven research. The Museum's CEO stated that "the BRCC should only accept a contract if it meets two of the following three criteria: 1. It generates net income; 2) it adds to the research collections; or 3) it generates research data. However, some of the scientists felt pressure to work on contracts that only have a financial benefit. As one of the scientists put it,

*"The BRCC has a strategic plan, and it is right on mission. But we are being pulled away from it by financial concerns. Contract work is doing somebody else's work."* – Key informant interview comment

However, another staff scientist saw a potential in contract work to create or add to research opportunities if creative approaches were taken.

The internal management audit, coupled with key informant interview results revealed an interesting weakness. Interviews with three external environmental professionals showed there is a very high regard for the Museum's research, its science staff and its collections. One of these individuals summed it up as:

*"SDNHM are the "biodiversity people," recognized as the regional experts."* – Key informant interview comment

Another individual said:

*"BRCC scientists are the "go-to" people for habitat impacts."* – Key informant interview comment

Interestingly, the internal audit indicated that 42% of the staff and Board felt there was a weakness in building stakeholder awareness about the Museum's research. These data points seemed contradictory until deeper probing during key informant interviews revealed that there was a broad general awareness of the Museum's research, but specific knowledge of actual research projects and exactly how the collections were being used was lacking. One of the external interviewees suggested a public awareness campaign could also promote both the Museum and environmental concerns:

*"Use research to build public awareness and interest through marketing, outreach and PR."* – Key informant interview comment

Four of the Museum scientists and two of four external environmental professionals indicated that the research of the various departments is not fully tied together and integrated into a "bigger picture." Three of the staff members suggested the lack of an

ecologist on staff resulted in this circumstance. It was also suggested by two staff members and an external source that this position be a very high-visibility scientist who could serve as the public face of the Museum's research efforts.

Neither the Mineralogy Department nor the Marine Invertebrates Departments have curatorial staff. According to several of the staff scientists and the CEO, Marine Invertebrates was formerly a major strength of the Museum. Due to economic hardships several years ago, positions in these departments needed to be eliminated.

## **Opportunities**

Two Board members who hold academic positions at UC San Diego indicated that there are potential collaborative research opportunities in marine ecology if the Museum were to regain its capabilities in marine invertebrates. The Museum's CEO also expressed this as an area for growth opportunities.

The internal management audit revealed nearly three quarters of the staff and Board felt that the Museum excelled building alliances and collaborations with other organizations. Key informant interviews with internal and external sources not only reinforced this point, but also suggested that the Museum is in an ideal position to collaborate on environmental research projects due to its unique expertise and collections. While there was considerable concern expressed by staff about contract work interfering with research, one of the scientists suggested that there could also be opportunities to use contract work to generate meaningful data for research projects.

## **Threats**

Two board members who hold high academic positions with a local university indicated that funding in the research arena has become increasingly competitive. Two staff members commented on the lack of research staff at the Museum makes it less viable as an academic research organization. In a highly competitive environment, this could place the museum at a distinct disadvantage.

## **Key Findings for KSQ3**

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Based on 13 key informant interviews<sup>14</sup>, the following conclusions for KSQ3 were made by the consulting team:

1. Significant environmental issues of the region focus on habitat degradation/loss, increasing frequency/intensity of wildfires, and water, as well as the implications of climate change. There is a great deal of agreement internally and externally on these issues.

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<sup>14</sup> See Exhibit D

2. The BRCC is recognized and highly regarded as independent and unbiased experts on local habitats and species. Despite being highly regarded, the Museum's research efforts are not as well known in the community as they should be; the research community seems to lack highly specific knowledge of the research capabilities, activities and collections of the BRCC.
3. Most of the BRCC research staff expressed some degree of concern that much of the contract work being carried out in BioServices interferes with their ability to conduct research.
4. A lack of support for managing the "business side" of contract work was expressed by several BRCC department heads and may negatively impact revenues and the ability to conduct the work.
5. The BRCC's expertise on local flora and fauna puts it in a position to be a valued partner collaborating with other organizations working on environmental research and conservation efforts.
6. With the absence of a Provost, the Museum is missing a key position that could add visibility and provide an ecological perspective to tie together various aspects of the Museum's research.

## RECOMMENDATIONS

### Overview

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Based on the information collected by the consulting team through the various tools presented in this report, the following is recommended to help inform the three strategic questions identified below:

**KSQ1:** How can the Museum best position itself to be a valued resource to the community in the face of changing regional demographics and social trends?

**KSQ2:** How can the Museum achieve long-term financial stability despite the fluctuation of economic trends?

**KSQ3:** How can the Biodiversity Research Center of the Californias (BRCC) research programs address the key environmental issues that are most relevant to the region upon which the Museum's mission is focused?

### Recommendations for KSQ1

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#### Social Media Blueprint

The Museum should create a social media strategy blueprint, including: implementation timelines; which social media networks to participate in; messaging and information

strategies and social media standards, including conduct. Social media efforts should coincide with the Museum's marketing and PR plans.

### **Performance and Metrics**

Although the return on investment is difficult to measure, the Museum should track social media participation carefully (community participation, engagements, member/donor conversions linked to the social media communities). This data will be helpful for capacity-building proposals and in surveying the Museum's marketing mix.

### **Education Plan**

The Museum should equip the staff, Board and volunteers with information regarding SDNHM's social media presence. This is also an opportunity to invite "Museum insiders" to become more engaged in the community.

### **Incorporation of Existing Expertise**

The Museum has an active online audience through the website and online newsletter, providing an opportunity to use social media as a platform for informing and engaging local and worldwide communities further with similar content through video, discussion and networking elements.

### **Act Now**

Consider implementing a Phase 1 social media strategy into the remaining objectives under Key Result Area 4.

### **Capacity Building**

As social media opportunities grow, the Museum may benefit from a part-time staff-person to maintain and create new strategies for SDNHM's online communities.

### **Recommendations for KSQ2**

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#### **Endowment**

The Museum's endowment is critical to the sustainability of the institution. New and innovative strategies to grow the endowment should be explored. Board and senior staff should collaborate to build the endowment through prospect identification and the cultivation of planned gifts. While this method is a "slow and steady approach" the Museum should explore the possibility of cultivating already engaged individuals including volunteers. In addition to a renewed focus upon cultivation opportunities, operational elements may also be employed to strengthen the endowment.

Currently, donors to the capital campaign are asked to give permission to the Museum for 5% of their contribution to be diverted to operational funds. A reciprocal process could be implemented to request that 5% of other Museum gifts (non-capital campaign) be diverted to the endowment.

### **Fundraising Education**

Our research indicated that the Museum Board and staff are interested in receiving fundraising education. An outside consultant or Museum staff member should facilitate a series of fundraising seminars for both Board Members and executive staff. Topics for these seminars may include: advanced practices in solicitation; planned, corporate, major and annual giving and trends in giving during economic hardship. The Board should also consider deploying a Board Giving Campaign, to stimulate giving. In this campaign, full Board participation is recommended, with goal contributions pledged by individual Board Members or raised through their relationships.

### **Fund Development/Capacity Building**

Although the Museum must remain fiscally tight in these times, attention should be paid to building a strong fund development team. In addition to hiring a major gifts officer and possibly a prospect researcher, members of the Museum's Executive Team should begin engaging in community networking activities. This could be done through engagement in community social networks, placing the Museum in a higher-profile space in San Diego's giving community. Strategies should also be crafted to address goals for high-level prospect development and resource building.

### **Contract and Research Funding**

Our research shows that the Museum's contracts with government agencies and private businesses infuse the organization with funding and may present additional funding opportunities. While this is an area the Museum should continue to develop, careful consideration should be taken in the review of potential contracts. The Museum should mobilize a task-force to review current contract business processes, since our research suggested that some contracts work is accepted even though it does not meet two of the three required criteria (adding to collections, providing research opportunities, generating revenue). Some concerns were expressed by curators regarding the administration work behind contracts. While it was noted additional staffing to support contract administration is not feasible at this time, the consulting team recommends the Museum make every effort to explore alternative options for supporting this potentially highly lucrative source of income. Museum staff may also benefit from education on contract administration.



## Recommendations for KSQ3

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### Communications Plan

The BRCC should have a communications plan targeting various audiences with information specifically selected to maximize value. For example, the research community needs to be made aware of the specific resources (e.g., collections data and scientific expertise), while potential funders should be made aware of how important conservation and land-use decisions are informed through data collected by Museum researchers.

### Contract Management

Review existing process for evaluating and choosing contracts. Consider modifying contract projects so they can be used as components for data sources for larger research projects. Look for creative ways to make contract work produce data that could be used for research.

### Predictive Modeling

Given its considerable expertise in local flora and fauna, the Museum should explore using its knowledge to develop predictive models that could indicate environmental problems (such as species that will be in trouble) looming on the horizon. For example, the Museum's ornithologist has documented a decline in California thrashers (*Toxostoma redivivum*) in areas that have been burned by wildfires. With the prediction of more frequent wildfires as a result of climate change, the Museum may be in a unique position to suggest that this bird will become a species of concern given current trends.

### Staffing

Explore means to bring a general ecologist on board as soon as possible to tie together the work of all the research departments. Ideally, this would be a high-level, high-visibility person (Provost) be the public face of the Museum's research efforts. Explore opportunities with local government (SD County) to develop stable, long-term biological monitoring contracts that could increase staffing levels and create opportunities to generate data that could be published in professional journals and not the "grey literature" where monitoring reports are typically found.

### Collaborative Research

Seek larger grant-funded projects in collaboration with other institutions. The BRCC's expert knowledge puts it in a position to collaborate with organizations such as SIO that have expertise in atmospheric science or climate change, but lack the in-depth and historic knowledge the Museum possess. Several key informant interviews suggested that current environmental problems are so large as to require multi-institutional approaches to engage is meaningful studies. With its unique collections and local expertise, the Museum has much to offer as a research partner.

# CHALLENGES AND LIMITATIONS

## Overview

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Throughout the duration of this strategic planning project, the consulting team made every effort to follow a systematic and rationale-driven methodology. While the recommendations made in this report are strongly supported by the data gathered, the consulting team has provided a brief narration below regarding the challenges and limitations encountered.

### **The Elements of and Effectively Managed Organization Survey (EEMO<sup>2</sup>™):**

Implementation of Survey Monkey's skip logic did not work as anticipated. Of 57 respondents that started the survey, up to 35 respondents were able to skip questions that the consulting team identified as necessary for informing KSQ 1 and KSQ 2.

In addition, the EEMO<sup>2</sup>™, selected from the Allison & Kaye text, *Strategic Planning for Nonprofit Organizations*, presented a significant challenge as an online internal management survey, due to its size (71 questions total). The consulting team felt it necessary to acknowledge its unusual length in the survey's introduction, but emphasized the fact that the data would be of tremendous value if staff and Board Members would take the time to complete it.

Also, the consulting team noted that a number of individual EEMO<sup>2</sup>™ questions could not establish results as definitive weaknesses or strengths. In some instances, the majority of respondents who perceived issues as strengths were rated at 65% or lower. The consulting team has considered that the wording of the survey questions may have influenced the lower majority percentages, as some questions required the respondent to reflect upon a number of factors, rather than on one specific issue.

### **Social Media Survey (RSS version):**

Initially the consulting team attempted to deploy the San Diego Natural History Museum Social Media Survey via the Museum's RSS feed, but after only 16 responses in 13 days, it was determined that a direct request from the Museum's 35,000 e-newsletter subscribers, using Survey Monkey, would elicit more responses.

### **Social Media Survey (Walk-in version):**

Museum Visitor Services personnel were asked to administer an on-site San Diego Natural History Museum Social Media Survey to a representative population of Museum visitors. Upon analyzing the survey results, the consulting team noticed the majority of surveys appeared to be demographically disproportionate. Many factors may have contributed to this, including bias towards a particular gender and age. The consulting team recognized that an objective approach, such as requesting staff to ask every 5<sup>th</sup> visitor to complete a survey, would capture a more representative demographic of Museum visitors, thus decreasing the potential for subjective selection of survey participants.

### **Two San Diego Natural History Museum Social Media Surveys:**

The Online Social Media Survey and the Walk-in Social Media Survey requested slightly different information from Museum visitors and e-newsletter subscribers. When reviewing, analyzing and comparing survey data, the consulting team realized that it would have been beneficial to have identical surveys for both walk-in and online data collection, as the Online Survey focused on the access to and the use of social media, and the Walk-In survey emphasized preference options for social media interaction with the Museum. In addition, the age group demographic was represented differently on each survey. For example: the age range for the Walk-In survey included ages 9 and under and the Online Survey included 18 years and under, combining youth and teens.

### **Interviews:**

Due to the number of interviews conducted, and the coordination of the consulting team members' individual schedules, it was difficult to ensure the participation of at least two consulting members in each interview. The presence of more interviewers is certain to gather a wider range and depth of information, and reduce the likelihood of interviewer bias.

### **Social Media Survey of Peer Institutions:**

Once ten U.S. peer institutions were identified, the gathering of each institution's use of social media presented a challenge due to the difficulty in determining what information had been issued specifically by the institutions, and what information had been issued by individuals representing their personal opinions about the institutions. In retrospect, it would have been helpful for the consulting team to have interviewed or surveyed these institutions about their own use of social media, especially regarding methods, measurements and outcomes. This data would have been helpful for making specific recommendations based on the current use of social media by similar institutions.

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