

Spring 2007

Strategic Planning: Plan-to-Plan Final Report

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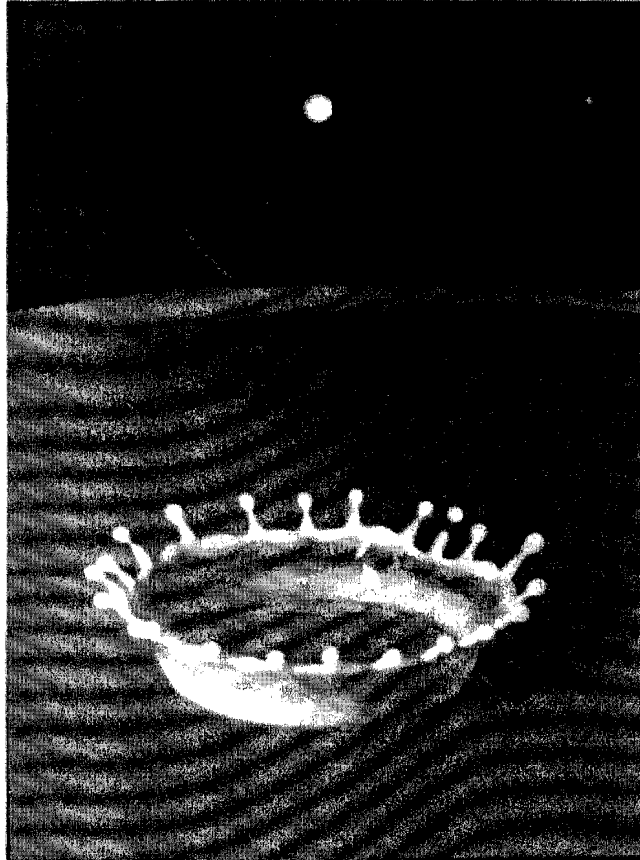
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Strategic Planning: Plan-to-Plan

San Diego, CA



Harold Edgerton: Atlas Gros-Castnet, 1997, dye transfer print, collection
Museum of Photographic Arts

Prepared by:
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EDLD 511: Strategic Planning for Nonprofit Organizations
Spring 2007

Executive Summary

In January 2007, [REDACTED] asked Paul Van Dolah (Instructor, Strategic Planning for Nonprofit Organizations, University of San Diego) to be considered as one of the clients for the spring class' applied projects. [REDACTED] is in a period of transition following the departure of Arthur Ollman, the founding director, after twenty-three years. Being highly cognizant of the need for change, the [REDACTED] Trustees and staff demonstrated their commitment to the museum's future with their decision to collaborate with USD.

Mauricio Gonzalez, Karen Seo, Paige Simpson and Mark Thompson, USD graduate students in Nonprofit Leadership and Management, selected [REDACTED] for their applied project. The USD team's purpose was to collect data that would be useful to the museum in its strategic planning process and to provide the client with two products: a Plan-to-Plan and this final report.

The Plan-to-Plan identified three key issues for [REDACTED] to consider in its strategic planning process, which also guided the USD team's data collection process. The Plan-to-Plan was based on preliminary research (a review of [REDACTED] documents, meetings with various Trustees and staff, and a readiness assessment) and presented to the Strategic Planning Committee on March 7, 2007. The three key issues were:

1. What are the "right" mission, vision, and values to effectively guide [REDACTED]?
2. How can [REDACTED] create and enact a business plan that will ensure fiscal stability and long-term sustainability?
3. How can [REDACTED] develop clear operational systems and a work culture that will enable the board and staff to function more effectively, both independently and in collaboration?

After the Strategic Planning Committee approved the Plan-to-Plan, the USD team proceeded with development and implementation of three data collection tools that focused on five sample groups. The tools and sample groups are as follows:

- Internal assessment audit
 - Trustee Survey
 - Staff Survey
- External assessment
 - Members Survey
 - Visitor Survey

- [REDACTED]
 - [REDACTED]
 - [REDACTED]
 - [REDACTED]
 - [REDACTED]
 - [REDACTED]
 - [REDACTED]

[REDACTED]

Data collection took place between April 13 and May 2. In addition to the six interviews, the following survey returns were compiled:

- 205 members
- 77 museum visitors
- 10 Trustees
- 15 staff

The collective data, as presented in this final report, generated a number of important factors for [REDACTED] to consider. These insights relate to the three key issues identified in the Plan-to-Plan and to audience and marketing, which emerged as a fourth issue during the data collection process. Some overarching themes include:

Redefining identity. Data collected from the internal and external assessments, the retirement of a highly influential founder and no significant review of its mission in over two decades, indicates that it is time for [REDACTED] to revisit its mission statement. According to the data, key areas to explore include [REDACTED] audience, its niche in the museum and cultural community (both locally and nationally), and its collection focus. While the mission will answer “who” [REDACTED] is now, a new vision statement would highlight “to what end” [REDACTED] is working. Finally, the creation of a shared values statement will inspire “how” the [REDACTED] team will work together to achieve its mission and vision, and/or explain the core beliefs that will guide [REDACTED] work moving forward. Clarifying these elements will help Trustees and staff work together effectively as well as decision-making and planning related to marketing, development, resource allocation, exhibitions and education—in short, all museum functions.

Knowing and targeting audience. A critical issue that emerged from both survey and key informant interview data is the importance of understanding one’s current and potential audience. This, in tandem with knowing the strengths and appeal of its collection and overall competitive advantage (niche), would give [REDACTED] powerful leverage in planning for exhibitions, education programming, development initiatives, museum store inventory, etc. *and* the marketing of each. The external assessments conducted for this strategic planning process are a useful first step. For example, a high number of visitors who responded to the survey were students in higher education degree programs. Perhaps the museum can find ways to build and capitalize on relationships with local universities. The membership survey also revealed that a majority of current members represent two different income brackets, but member events and special events are geared primarily toward the higher income bracket. This revelation creates an opportunity to better connect with more members.

Developing a unique business model for Stability and Sustainability. [REDACTED] recognizes that it has outgrown its current business administration model. [REDACTED] Trustees and staff must redefine income development and resource allocation, budget process and investment planning,

and endowment development. Every museum is unique, thus no one model “fits all,” but some common themes and relevant strategies emerged in the key informant interviews to help [REDACTED] move forward. (Interestingly enough, several of the institutions that participated are transitioning from a founder-driven museum with similar challenges and, like [REDACTED] are taking steps for constructive change.) Some of the key strategies shared by the interviewees are: striving for a balanced revenue mix (1/3 earned income, 1/3 contributed income, and 1/3 endowment income); considering environmental factors in the planning process, such as local and national funding trends in the arts and National Endowment for the Arts standards for investing; and having a strong “give and get” fundraising board.

Clarifying roles and creating culture. Two key strengths and two critical issues exist for [REDACTED] for both the Board and staff. The strengths are people’s passion for their work and their commitment to [REDACTED] and its success. The critical issues are that tension and poor working relationships, caused by role ambiguity and the stress of change, may be diffusing the museum’s strengths. The data suggests strategies for both Trustees and staff to consider to improve this situation: creating/refining job descriptions, conducting annual assessments with on-going informal feedback, being educated about one another’s roles, receiving on-going professional development, and communicating more effectively. Additionally, the Trustees cited an interest in expanding the Board, reviewing its bylaws, and establishing governance and audit committees. The staff expressed a desire for more opportunities to brainstorm and collaborate as well as clarity of direction from above and constructive leadership. Indeed, if teamwork and respect are enhanced between the Board and staff, everyone will benefit. Buy-in from all stakeholders is critical for the success of [REDACTED] forthcoming strategic plan.

[REDACTED]

[REDACTED]

[REDACTED] began, in spirit, in 1972 as a group of local photographers and patrons hosting exhibitions under the name of "[REDACTED]". In 1983 the group codified as a museum with nationally renowned curator/photographer [REDACTED] as the Founding Director.

[REDACTED] led the museum for twenty-three years. Under his vision and leadership, [REDACTED] enjoyed great curatorial and educational success, developed a rich collection of more than 7,000 photographs that span the history of photography, created 15 internationally-traveled exhibitions, became accredited by the American Association of Museums, and secured a museum facility that quadrupled its space in 2000.

Today the [REDACTED] is still one of the few museum facilities in the United States designed exclusively to collect and present the world's finest examples of photographic art. Its mission is to inspire, educate and engage the broadest possible audience through the presentation, collection, and preservation of photography, film and video. [REDACTED] operates with a \$1.92 million budget and 16 full-time staff, 6 part-time staff, 14 Trustees, and 10 Distinguished Trustees.

Given [REDACTED] steady growth and the founding director's retirement in 2005, [REDACTED] presently faces a unique set of challenges as it transitions to new leadership and a new phase of life. Operational and fiscal best practices have moved to the forefront of museum leadership's attention, as well as its artistic and collecting priorities and [REDACTED] identity. The new director, [REDACTED] and current Trustees are poised and eager to build upon [REDACTED] successes and transition the museum to the next level of excellence and sustainability. Staff is eager to be a part of these next steps as well.

About the USD Team

Mauricio Gonzalez, Karen Seo, Paige Simpson and Mark Thompson are currently pursuing Masters degrees in Nonprofit Management & Leadership at the University of San Diego.

Mauricio Gonzalez is the Executive Director of the Border View YMCA and is a graduate of SDSU with an undergraduate degree in Recreation Administration. He has led his YMCA branch through its last strategic planning process entitled *Inventing Our Future*. Mauricio resides in La Mesa, CA, with his wife Michelle, his son Tanner, and a Shiba Inu named Suki.

Karen Seo is the Marketing and Development Associate at Mingei International Museum and also serves as the Executive Assistant to the Director. Ms. Seo supports Board communications, designs and edits the monthly e-bulletin, works extensively on the Anniversary Gala and coordinates Early Evening at Mingei, a marketing event for young professionals. Ms. Seo holds a B.A. in Philosophy and Art History from Wellesley College.

Paige Simpson is an Associate at the Balboa Park Cultural Partnership, a collaborative of twenty-one cultural institutions in historic Balboa Park. Prior to this, Ms. Simpson worked in museum education for thirteen years, most recently at the National Gallery of Art in Washington, D.C. Ms. Simpson holds a B.A. in Art History from The College of William and Mary, and a M.A.T. in Museum Education from The George Washington University.

Mark Thompson is the Associate Executive Director of YMCA Camp Surf, and has been working for the YMCA for more than 14 years. As the staff leader of YMCA Camp Surf he is responsible for a physical plant of 45 acres and an operational budget of \$2 million dollars. He is an active board member, Rotarian, and is involved in a nationwide environmental initiative for the YMCA. Mark graduated with a B.S. in Human Services from Springfield College and lives in Imperial Beach with his wife Zyanne and son Keaton.

Project Methodology

In January 2007, the [REDACTED] asked Paul Van Dolah (Instructor, Strategic Planning for Nonprofit Organizations, University of San Diego) to be considered as one of the clients for the spring class' applied projects. Mauricio Gonzalez, Karen Seo, Paige Simpson and Mark Thompson selected the project as a team. The team committed to developing two key products for the museum: the Plan-to-Plan and a data collection report for [REDACTED]

Meetings and Correspondence

To begin, the USD/[REDACTED] team met with members of [REDACTED] staff and [REDACTED] Strategic Planning Committee to set goals and deadlines for the research project. [REDACTED] Trustee and Strategic Planning Committee Chair, was the primary [REDACTED] contact.

The USD/[REDACTED] team met at least once a week to discuss project details, individual tasks, group objectives, group dynamics and project updates. Paul Van Dolah, the USD course instructor and principal of Van Dolah and Associates, advised the group regularly on key issues, the selection of research tools, and data collection. The team met with [REDACTED] Strategic Planning Committee on a monthly basis.

Email and phone correspondence allowed all participants to share updates and suggest revisions in-between meetings.

Plan-to-Plan

The Plan to Plan highlights the key issues for an organization to consider in its strategic planning process and acts as a roadmap for the gathering of data that will drive the plan. The USD team began formulating the Plan-to-Plan by taking one month (February) to attend meetings, conduct interviews, compile documents and interview notes, and review internal [REDACTED] documents. A key component of this initial research was a readiness survey completed by Linda Moore, Trustee and Strategic Planning Committee Chair; Mary Donnelly, Board President; Deborah Klochko, Executive Director; and Gail Bryan, Board Secretary. The Plan-to-Plan was presented to the [REDACTED] Strategic Planning Committee on March 7. It was recommended that the USD team conducted its research while [REDACTED] Trustees complete the following:

- 1) Trustees form a separate task force to support the executive director in implementing a fiscal crisis management plan. This task force should include trustees who have fiscal management expertise and are able to dedicate the necessary time.
- 2) The strategic planning committee moves forward in addressing [REDACTED] mission, vision, and values. Those who are particularly passionate about the mission, vision, and values

should play a key role in moving the group forward. Outside facilitation would be beneficial. (A facilitated meeting was held from 9:00 a.m. to noon on April 14.)

Formulation of Key Issues

Using the collective data gathered in February, and under the advisement of Paul Van Dolah, the USD/[REDACTED] team identified three key issues facing [REDACTED]. In turn, these issues (posed as questions) guided the group's selection and composition of research tools.

- Issue One: What are the "right" mission, vision, and values to effectively guide [REDACTED]
- Issue Two: How can [REDACTED] create and enact a business model that will ensure fiscal stability and long-term sustainability?
- Issue Three: How can [REDACTED] develop clear operational systems and a work culture that will enable the board and staff to function more effectively, both independently and in collaboration?

Research Tools

Following the [REDACTED] Strategic Planning Committee's approval of the key issues, the USD team selected and developed three data collection tools (consisting of four types of surveys and one type of interview) in order to address them (See Chart A at end of section.):

- Internal Assessment Audit (Board Survey, Staff Survey)
- External Assessment (Members survey, Visitors survey)

- [REDACTED]

Over five weeks, all tools were developed and edited collaboratively by the USD team. They were also reviewed, revised, and approved by [REDACTED] staff and Strategic Planning Committee members, as assigned by the committee.

Distribution

With the help of the Strategic Planning Committee, the USD/[REDACTED] team launched the Board, staff, and member surveys via the web using Survey Monkey, an online survey tool; the visitor was distributed at the front desk of the Museum; and the USD team conducted the key informant interviews by telephone. Data was collected over a period of 2 ½ weeks, as follows:

- Members and visitors survey (April 13-April 27)

- Board survey (April 18-25)
- Staff survey (April 23-27)
- [REDACTED]

Outcomes

In addition to interviews with key staff at six museums, 77 visitor surveys, 205 member surveys, 10 board surveys, and 15 staff surveys were collected. Utilizing interpretation of the raw data and group discussion, the USD/[REDACTED] team formed key recommendations to submit to the Strategic Planning Committee in this report.

Chart A: Data tools in relation to key issues

Issues→ Data to be collected ↘ Tools↓	Issue 1: Mission (Vision and values)	Issue 2: Business Model	Issue 3: Operational systems and work culture
Board survey (Internal Evaluation)	Does our mission describe who we want to be?	Do trustees understand their fundraising responsibilities?	Do trustees work effectively with staff and peers? Do trustees understand their governance role?
Staff survey (Internal Evaluation)	Is the mission a key part of exhibit and educational development?	Are resources allocated effectively?	Does staff work effectively with trustees and peers? What is the work environment like?
Business Model Survey (Key Informant Interviews)	What impact does the mission have on the decision process at other museums?	What key financial management strategies are in place at other museums?	What fiscal management practices, collaborative efforts, and board and staff relations support sustainability?
Membership survey (External Evaluation)	Does the mission impact members in any way?	Do members have the potential to be more engaged as donors?	What is the current perception of membership value and member satisfaction?
Visitor Survey (External Evaluation)	How does the audience, as described in the mission statement, compare to actual visitorship?	How can satisfied visitors contribute to an effective business model?	Who are [REDACTED] visitors? Are they satisfied with their experience?

Recommendations

A Note on the Recommendations

It is important that the reader review all of the recommendations as they complement and contrast important each other. Additionally, recommendations often relate to more than one issue so it will be important for them to reviewed and analyzed as a whole.

Marketing emerged from the data collection process as a fourth issue. It has been included as "Audience and Marketing" in the recommendations below.

ISSUE ONE: Mission, Vision, Values

1. The data recommends the revision of [REDACTED] current mission statement, as an integral step in the transition from a founder-driven to a board-and-staff-led organization and as an indication of where the museum is headed. Five key ideas were generated from the data:
 - a) Trustees and staff overwhelmingly feel the mission has some positive attributes, but needs to be revised
 - b) The current definition of audience in [REDACTED] mission is too vague and not entirely accurate
 - c) [REDACTED] mission should articulate [REDACTED] unique position in the arts community
 - d) [REDACTED] mission does not currently elicit enthusiasm or generate passion for what [REDACTED] does
 - e) [REDACTED] current mission does not highlight its collection
2. [REDACTED] does not currently have a vision statement that is actively guiding the organization. The development of a vision statement has the potential to move [REDACTED] forward in the following areas:
 - a) Provide focus for Trustees and staff in exhibition and program development
 - b) Help guide decision-making
 - c) Strengthen Trustee and staff relationships
 - d) Provide clarity and inspiration for visitors and members
3. [REDACTED] does not currently have a values statement. The data indicates that, even informally, Trustees and staff do not share a common perception of values specific to [REDACTED]. A shared values statement can benefit [REDACTED] in the following ways:
 - a) Form priorities
 - b) Provide clarity for how Trustees and staff work together
 - c) Create a sense of community
 - d) Help guide the decision-making process

ISSUE TWO: Business Models

1. The data strongly recommends a budget development process that has the following key components:
 - a) Individual departments initiate the budget development process by submitting ideal departmental budgets to senior management



- b) Staff allocates a period of three months for budget development
 - c) Board approval passes through the finance committee, executive committee approval and board approval
 - d) Budget review occurs at least 4 times a year
 - e) Budgets are completed and approved by the last quarter preceding a new fiscal year
2. External and internal factors to consider during budget development may include:
- a) The financial positions of the City and County of San Diego
 - b) Potential new funding sources and the status of current funding sources
 - c) Inflation Rates
 - d) Performance reviews and merit increases
 - e) Current fiscal year performance
3. The business model data suggests a focus on the following development strategies:
- a) Conducting a thorough assessment of funding needs to help advocate for funding
 - b) Strong Board give and get criteria and participation
 - c) Utilizing a shared grant-writing schedule and assignments
 - d) Conducting an annual appeal
 - e) Developing an endowment
4. [REDACTED] should strive for a revenue mix of 1/3 earned income, 1/3 endowment income, 1/3 contributed income
5. Acquisitions for [REDACTED] collection should be based on complementing the current collection and/or increasing the depth and breadth of the collection.


ISSUE THREE: Operational Systems and Work Culture

1. The data illustrates the need for the Board of Directors to develop governance and operation systems to address the needs of [REDACTED] in a strategic capacity. Some approaches include:
- a) Having board committees that are relevant to the key needs of [REDACTED]
 - b) Involving key staff members on board committees to promote teamwork, understanding, and dialogue between Trustees and staff
 - c) Utilizing the Board or a Governance Committee to develop a comprehensive board development plan that includes strategies for identifying, recruiting, training and retaining the types of Board Members that [REDACTED] will need in order to meet the goals that will arise from the strategic planning process
 - d) Conducting board orientations that include information on roles and expectations of board members for all newly recruited board members.
 - e) Conducting regularly scheduled assessment to inform individual and collective Board member development
 - f) Coaching Board members to fulfill the potential of their duties and when this is not successful, moving them out of this particular role

2. The data suggests that a lack of communication and collaboration exists between Trustees and staff, leading to misunderstanding and tension. It will be important for Trustees and staff to work effectively together in the strategic planning process and beyond, in order to create positive change. Strategies represented in the data include:
 - a) Cultivating staff endorsement of short- and long-term planning is crucial to the success of an organization
 - b) Trustees involve staff in the development of the strategic plan
 - c) Trustee and staff voices are valued in planning and decision-making
 - d) Allocating time for experimentation, reflection and assessment at the board and staff levels
3. Evaluation, professional development, and recognition emerged as a key need for Trustees and staff. These would provide clear understanding of responsibilities for both groups and may help foster teamwork. Components may include:
 - a) 360 degree evaluations for trustees and executive staff team create an atmosphere of dialogue and candor so tough issues can be addressed openly
 - b) Staff job descriptions are linked to annual written performance reviews
 - c) Trustees and staff engage in ongoing professional development and utilize creative incentives for tying work to sustainability goals, where appropriate
 - d) Create opportunities for internal recognition and encouragement to celebrate accomplishments
4. The data suggests that increased dialogue between a variety of working groups at the board and staff level will promote cohesion and positive morale for all. The following actions provide a framework to do this:
 - a) Clear delineated Trustee and staff roles to eliminate conflict and confusion
 - b) Annual board retreats to establish the goals for the upcoming year that include key staff
 - c) Revision of the organizational chart to encourage proper chain of command
 - d) Collaborative efforts between a variety of board and staff work groups to maximize efficiency and provide opportunities for trustees and staff to work together
5. The data emphasizes the importance of planning at all levels of an organization to ensure a clear road map is provided for Trustees and staff.
 - a) Operations planning maps a year's goals and links to a strategic plan; the strategic planning process looks 3-5 years ahead; long-range planning looks to 5-10 years in the future
 - b) Campaign planning requires professional counsel to ensure success

ISSUE FOUR: Audience and Marketing

1. Compare the profiles of members, visitors, and program attendees to determine if [redacted] is truly serving "the broadest audience" possible. This preliminary data suggests "no." Trends that emerge from this comparison will then be useful in future marketing efforts and in cultivating donors and visitors.

- 
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2. Interpret museum programs and membership benefits to be a reflection of [REDACTED] mission, vision and values.
 3. Initiate more customer service training to accommodate the needs of members and visitors to the Museum.
 4. Consider the financial constraints and opportunities of members when calculating program and special event costs.
 5. Capitalize on the immense potential of connecting to new and repeat [REDACTED] visitors through educators, especially those in photography departments of local schools.
 6. Support better communication with members, so that members are aware of current and new membership benefits.
 7. Conduct on-going member and visitor evaluations to assess audience composition and trends.

BOARD OF TRUSTEES SURVEY

Internal Assessment Audit

Methodology

In April of 2007, the Board of Trustees participated in a self-assessment survey. The survey was part of an internal analysis, the intent of which was to inform the organization's Strategic Planning Committee of any potential issues facing the Board or the organization as a whole. The survey consisted of 52 statements in three major categories: Familiarity with and use of [REDACTED] mission statement; Board structure and function; and the Board's working environment.

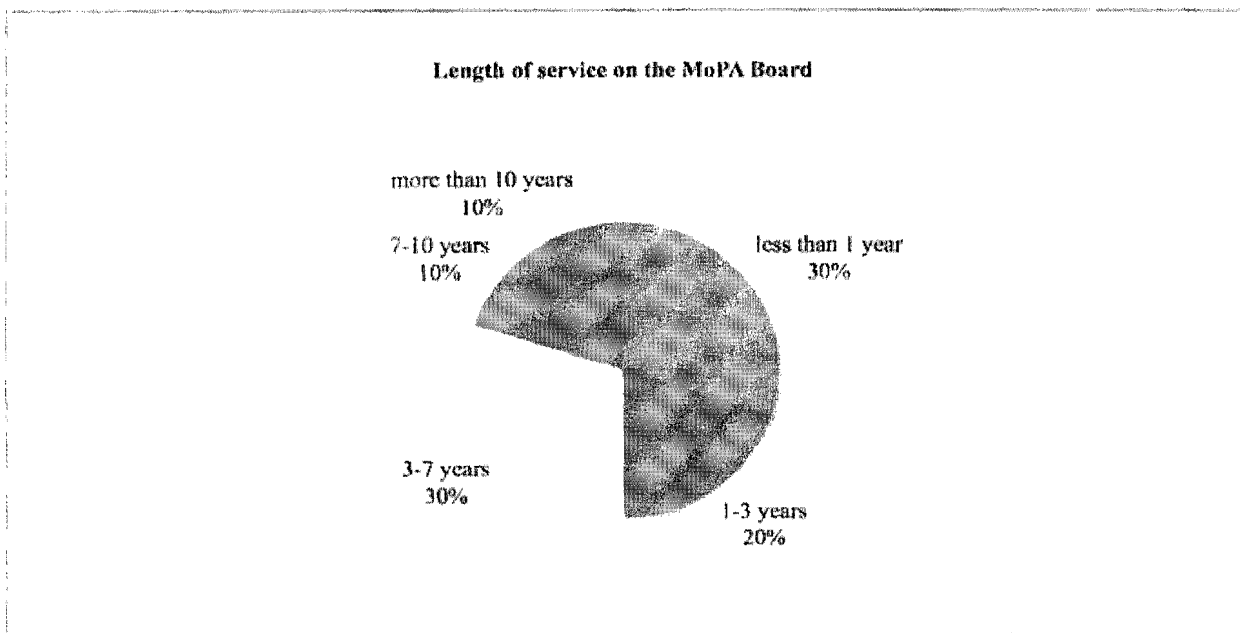
Ten trustees responded to the survey, representing 71.4% of the membership. This is considered to be a representative sample for statistical purposes. Each statement was given a favorability percentage correlating to the number of respondents that answered either "agree" or "strongly agree." The higher the percentage the more favorable that question was rated.

A copy of the survey's raw data can be found in Appendix B.

Analysis

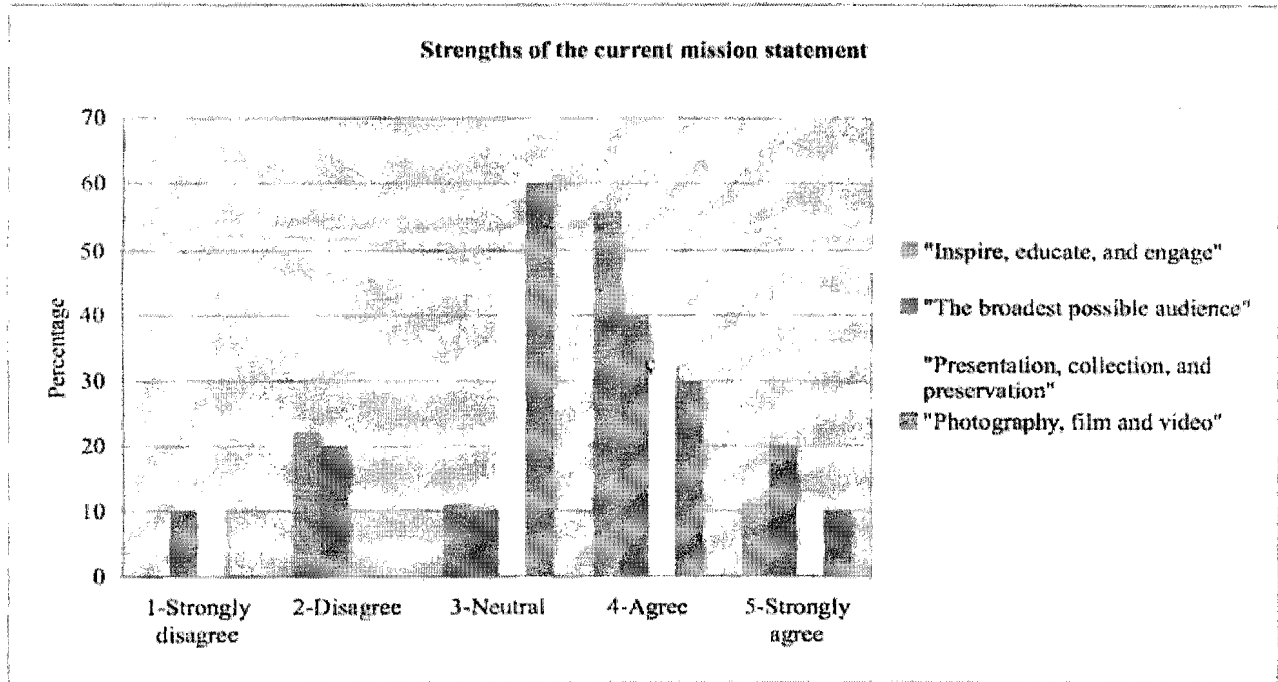
Board length of service

50% of Trustees have served 3 to 10 years on the Board. While this represents a powerful source of historical insight and commitment to the institution, it can lead to burn-out, especially during a time of change and transition. The Board should consider what length of service is most constructive for Board members, as well as other opportunities for interested people to be involved prior to or following service on the Board.



Mission

100% of respondents either agreed or strongly agreed that they are familiar with [redacted] mission statement. 60% feel that it needs improvement. "Photography, film and video" were considered the strongest elements of the current mission statement, while "The broadest possible audience" received the least favorable marks.



Board environment: Highs and lows

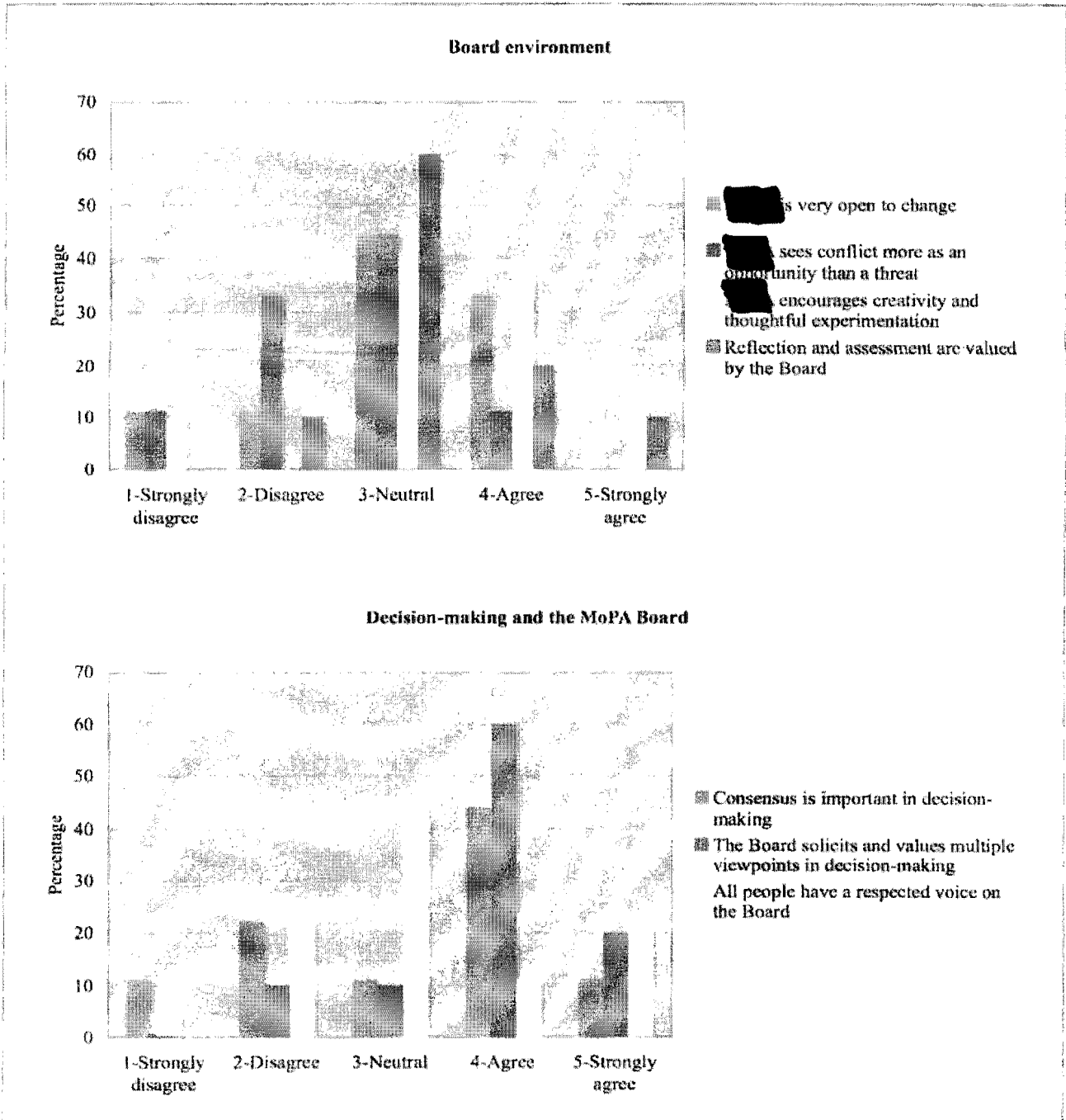
Statements 44, 45, and 46 had three of the highest overall percentages with 80% of respondents choosing either "agree" or "strongly agree" to:

44. All people have a respected voice on the Board.
45. The [redacted] Board solicits and values multiple viewpoints in decision-making.
46. Board Members at [redacted] act ethically and with integrity.

Conversely, none of the 10 respondents agreed or strongly agreed that the governance committee assures unproductive board members are identified and appropriately coached, mentored, and asked off the board if need be.

Other statements with low ratings (10%) of respondents agreeing or strongly agreeing include:

23. The Board sets high, realistic annual goals and standards for growth in membership, program, and contributed income according to the strategic plan.
24. The Board sets, high, realistic annual goals and standards for growth in board development according to the strategic plan.
40. The [redacted] board sees conflict more as an opportunity rather than a threat.
43. The [redacted] board and staff work well together.

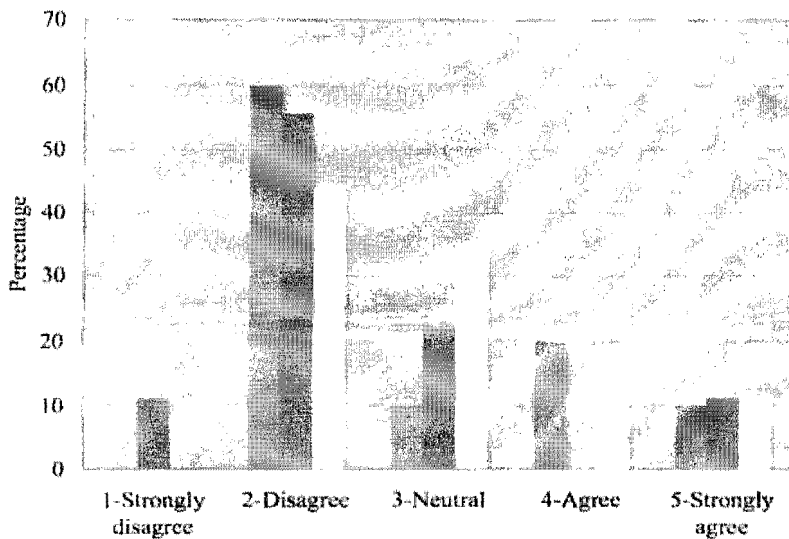


Board roles and relationships with staff

A majority of respondents indicated that their roles as Trustees are not clearly defined and or respected. This may relate to the data that suggests the Board is involved more with the implementation of operations (typically a staff responsibility) than strategic issues (typically a Board responsibility). This overlap may cause confusion and/or tension as well as the low ratings regarding the working relationship between Trustees and staff.



Board roles and relationship with staff



■ Board roles are clearly defined and respected

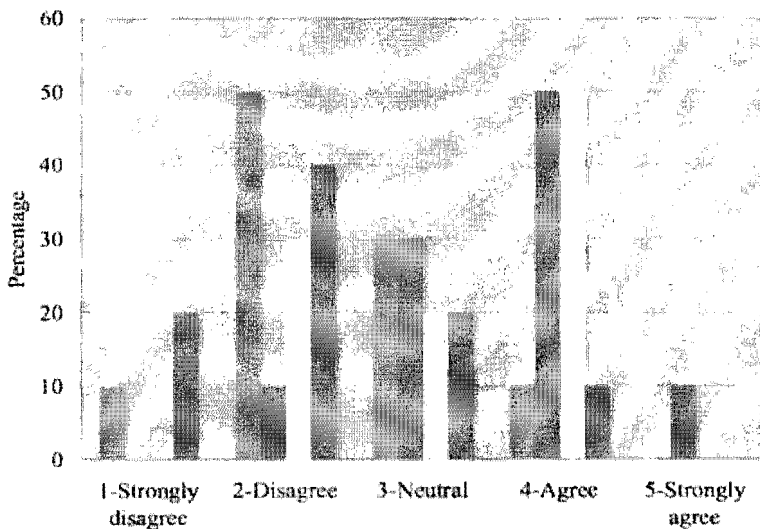
■ Board and staff work well together

The Board focuses on strategic issues rather than implementation of operations

Fundraising

Fundraising is generally an important responsibility for a museum Board. Responses regarding Trustees' involvement in fundraising were mixed. For example, a majority of Board members view philanthropy as a top priority but their annual goals are not seen as realistic and less than 90% actively participate in raising contributed income.

MoPA Board and Fundraising



■ Board sets high realistic annual goals for membership and contributed income

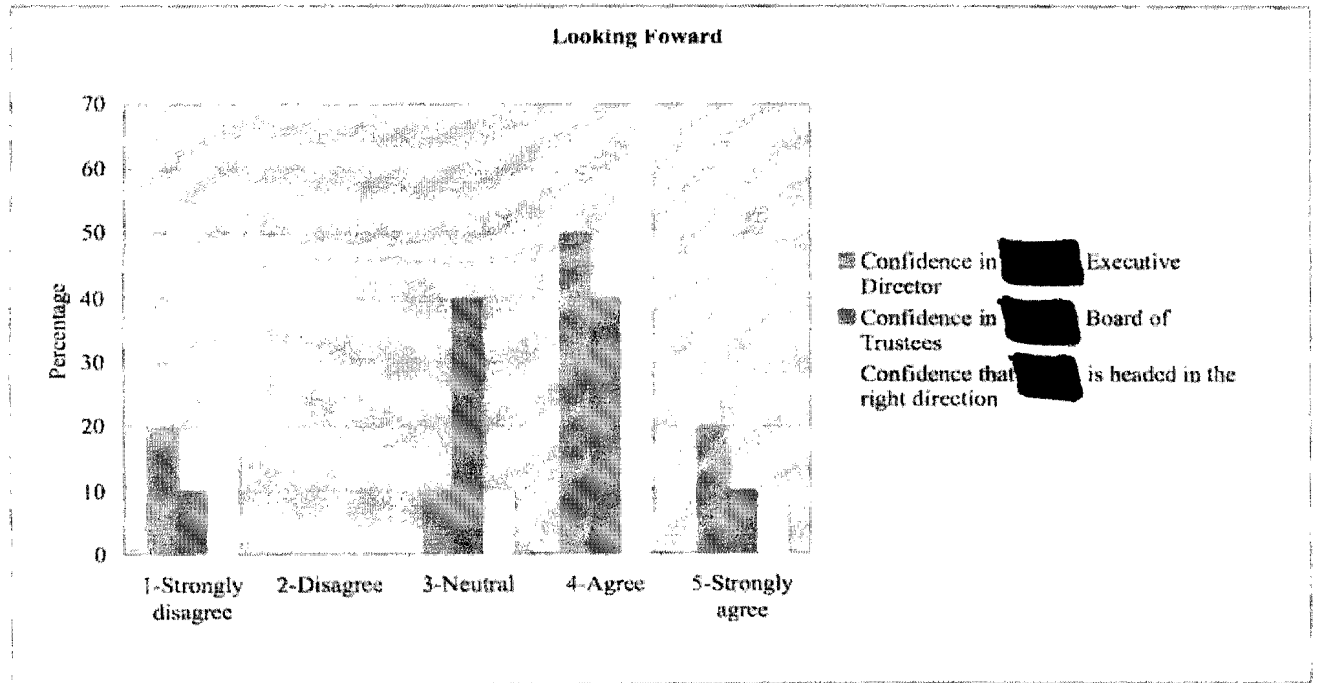
■ Board members view philanthropy as one of their top priorities

100% of Trustees contribute to an annual campaign

■ 90% of Trustees actively participate in raising contributed income

The future

In general, most of the Trustees believe that [redacted] is headed in the right direction. Confidence in the Executive Director is stronger than in the Board of Trustees. It seems a small core of people may need to be brought along in the vision for [redacted] future and leadership.



STAFF SURVEY

Internal Assessment Audit

Methodology

The [redacted] staff survey was comprised of three sections— [redacted] Mission and You (14 questions), Your Position at [redacted] (21 questions), and The [redacted] Work Environment (26 questions). The survey was successfully distributed to 21 staff emails; 15 responses were received for a return rate of 71%.

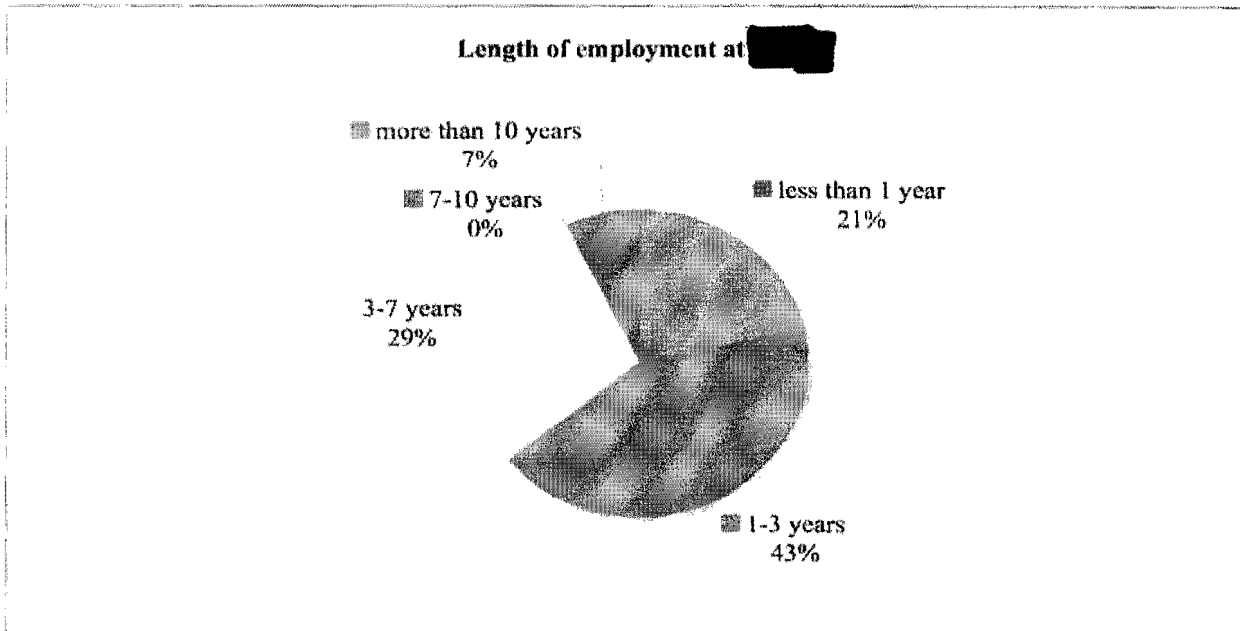
Insights yielded by the [redacted] staff survey primarily address issues one and three of the three key issues outlined in the plan to plan. Issue one relates to mission, vision, and values and issue three relates to operational systems and work culture.

A copy of the survey's raw data can be found in Appendix C.

Analysis

Length of service

Upon completion of the survey, staff was asked to indicate their length of service. With 64% of staff employed three years or less, [redacted] has a fairly young staff. This can be helpful in a change process, as fewer people may cling to tradition.



Mission statement: familiarity and referencing

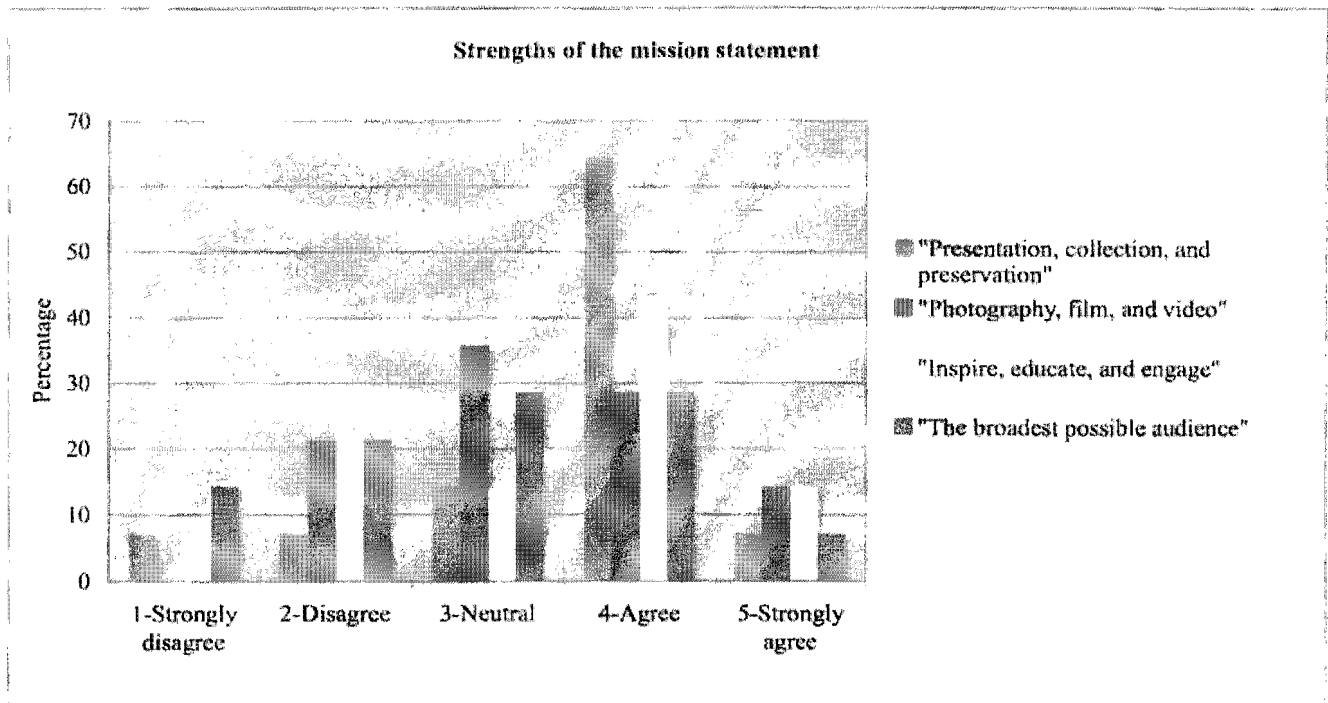
93.3% of staff agree or strongly agree that they are familiar with [redacted] mission statement. However, they were equally divided over whether it was referred to frequently by staff and/or in museum materials (33.4% each). They were slightly less positive about it being referenced in planning discussions (28.6% agreed). In the commentary, several respondents noted that they

would like to see the mission incorporated more in both external materials (i.e., publicity) and internal planning and decision-making.

Revising the mission statement

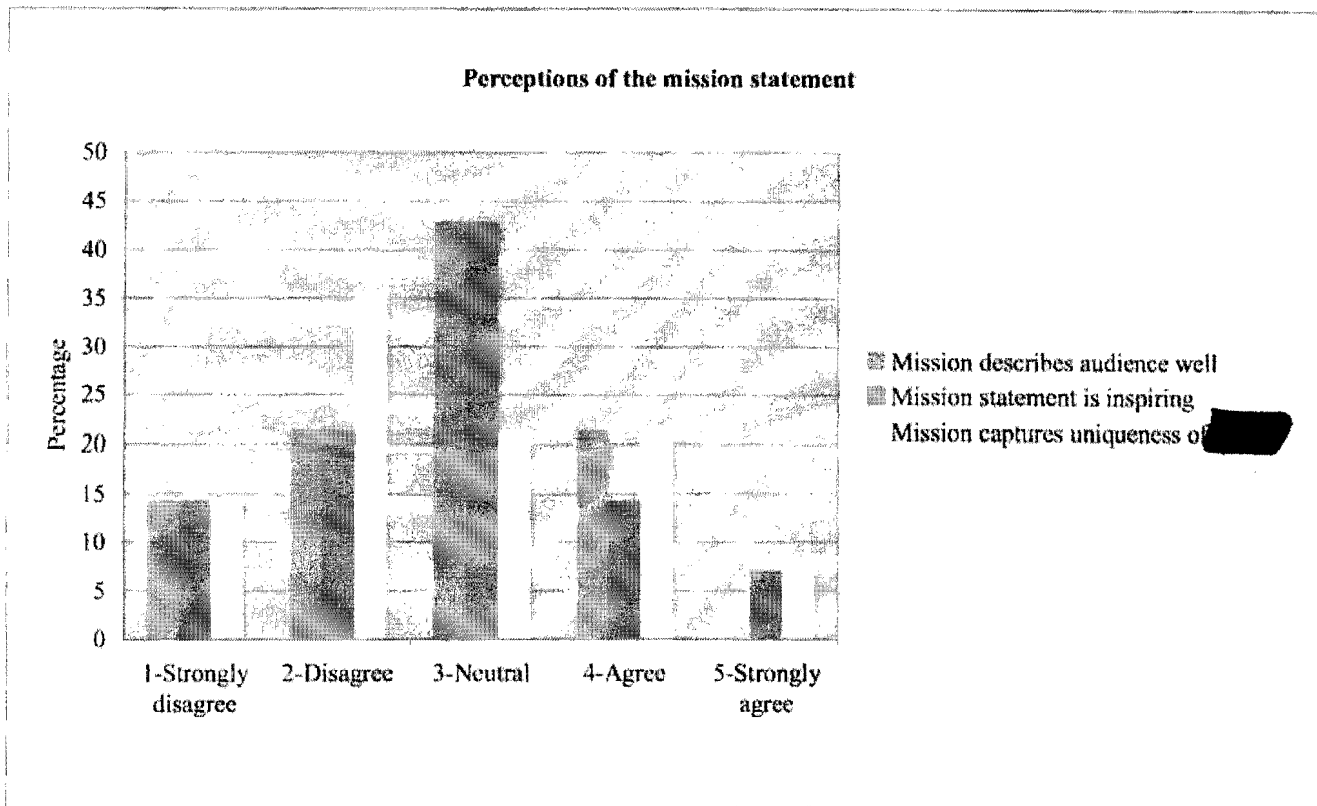
57.2% of staff feels *more* than neutral that the mission statement needs improvement. The survey indicated a desire for staff to be involved in the mission revision, as part of the strategic planning process.

“Presentation, collection, and preservation” received the most positive marks as a strength of the mission statement, followed by “Inspire, educate, and engage” and “Photography, film, and video.” Despite the latter, several write-in comments reflected frustration that film and video do not receive the attention its placement in the mission statement would suggest. “The broadest possible audience” was seen as the least strong element in the mission.



Key concepts

Describing the audience well, capturing the uniqueness of [redacted] and being inspirational, emerged as the top three concerns regarding the mission statement’s key concepts. These were echoed repeatedly in the write-in commentary.



Finances and planning

100% of staff agree or strongly agree that they consider the potential financial impact of their work on [redacted] when making planning decisions.

Structure and deadlines

A majority of staff (57.1%) agreed that deadlines are clearly articulated and respected at [redacted] however only 21.4% agreed that [redacted] operates in an organized and structured manner.

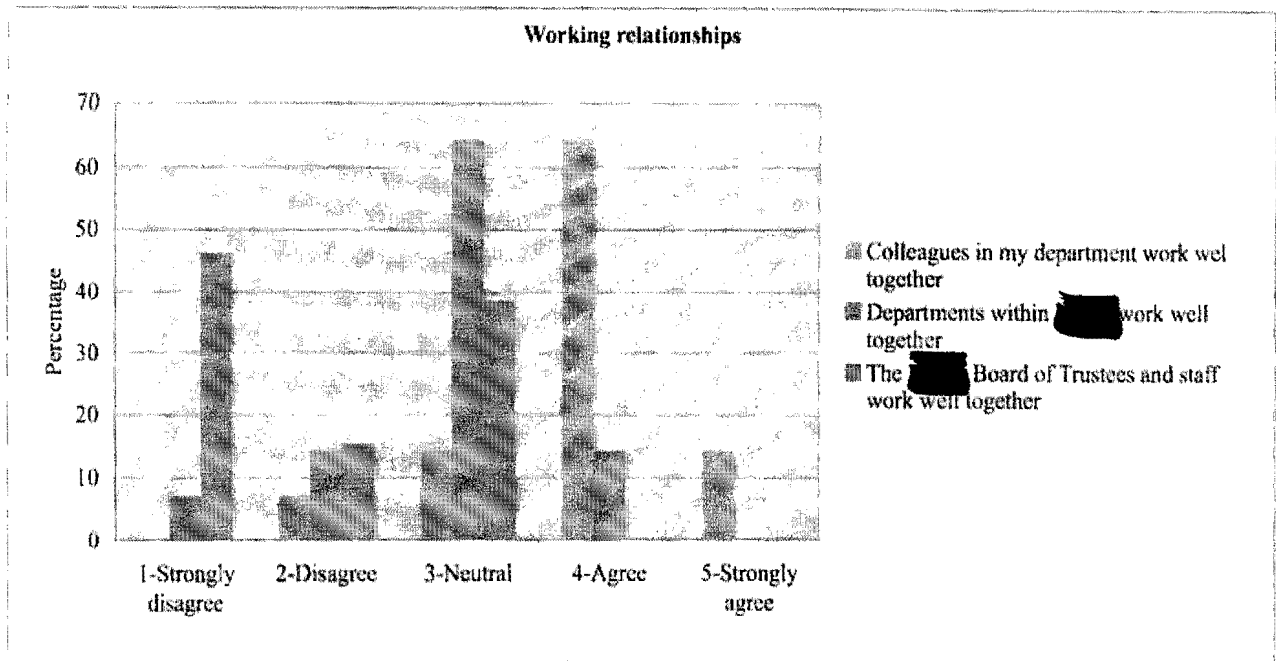
Workload, enjoyment, and compensation

78.6% of people agree or strongly agree that they enjoy the actual work they perform. The same number of staff also agreed that there was a close match between their job description and what they do. However, some of the write-in commentary spoke to another experience. Some people feel that they are frequently asked to do things outside of their job description and are stretched too thin. Over 50% of respondents feel that the work load is not divided evenly and fairly between staff.

Staff felt most positively about the opportunity they have to use their skills and abilities (64.3% agree or strongly agree) and their receipt of the resources needed to do their jobs well (42.8% agree or strongly agree). They agreed least that their compensation is fair as compared to similar positions in similar institutions (7.1% agree).

Supervision

A majority of [redacted] staff agree or strongly agree that they understand what their supervisor expects of them (64.3%) and that they are given the authority and support from above to do their job well (57.2%). The greatest percentage (78.6%) agree or strongly agree that they feel comfortable sharing their questions or concerns with supervisors or leadership. Yet, it seems this exchange happens more informally: 42.8% agree or strongly agree that they consistently receive constructive feedback on their work, while only 21% agreed that they receive an annual written review of their performance.



*A negligible number of "I don't know" responses were affixed a zero value and factored out of the interpretation.

Relationships

A majority of staff agreed or strongly agreed (64.2%) that people help each other when needed at [redacted]. Relationships seemed to be stronger with colleagues in a department than between departments. Some of the write-in comments expressed a desire for more communication and/or collaboration between departments, such as education and curatorial.

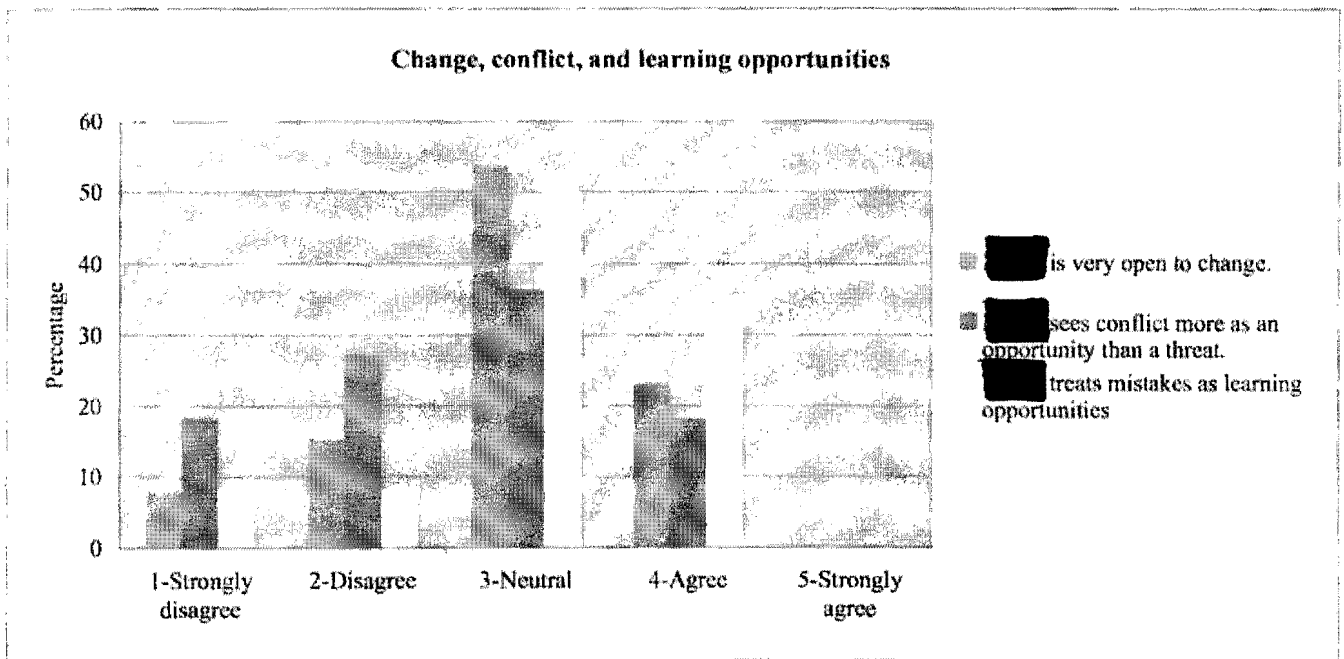
This disconnect continues moving vertically through the organization. No one agreed or strongly agreed that the [redacted] Board of Trustees and staff work well together. Additionally, 42.9% of staff was neutral about there being clear communication from the top down regarding the state of affairs at [redacted]. Write-in comments noted a sense that the Executive Director is already making improvements operationally yet also a concern that she is losing focus on leadership of the staff as she deals with the museum's challenges. Some requests for a team management approach were mentioned.

50% of staff disagreed or strongly disagreed that roles are clearly defined and respected at [redacted]. Perhaps the disconnect—at all levels, from board to staff—relates to role ambiguity. Some of the write-in comments also echoed frustration that people do not understand one another's roles well.

Departments are not, however, isolated from one another—50% say they have enough exposure to other departments to understand the big picture of what is going on in the museum. Staff also noted collaboration as a positive value of [redacted] but were more neutral on whether or not resources (i.e., time) are dedicated for it to happen effectively.

Creativity, change, and learning

Many staff commented that creativity is an important element of their work, but only 30.8% agreed that [redacted] encourages creativity and thoughtful experimentation. The write-in comments suggested that more collective brainstorming opportunities be provided. Being creative can mean allowing for change, working through conflict, and having room to experiment and fail.



*A negligible number of "I don't know" responses were affixed a zero value and factored out of the interpretation.

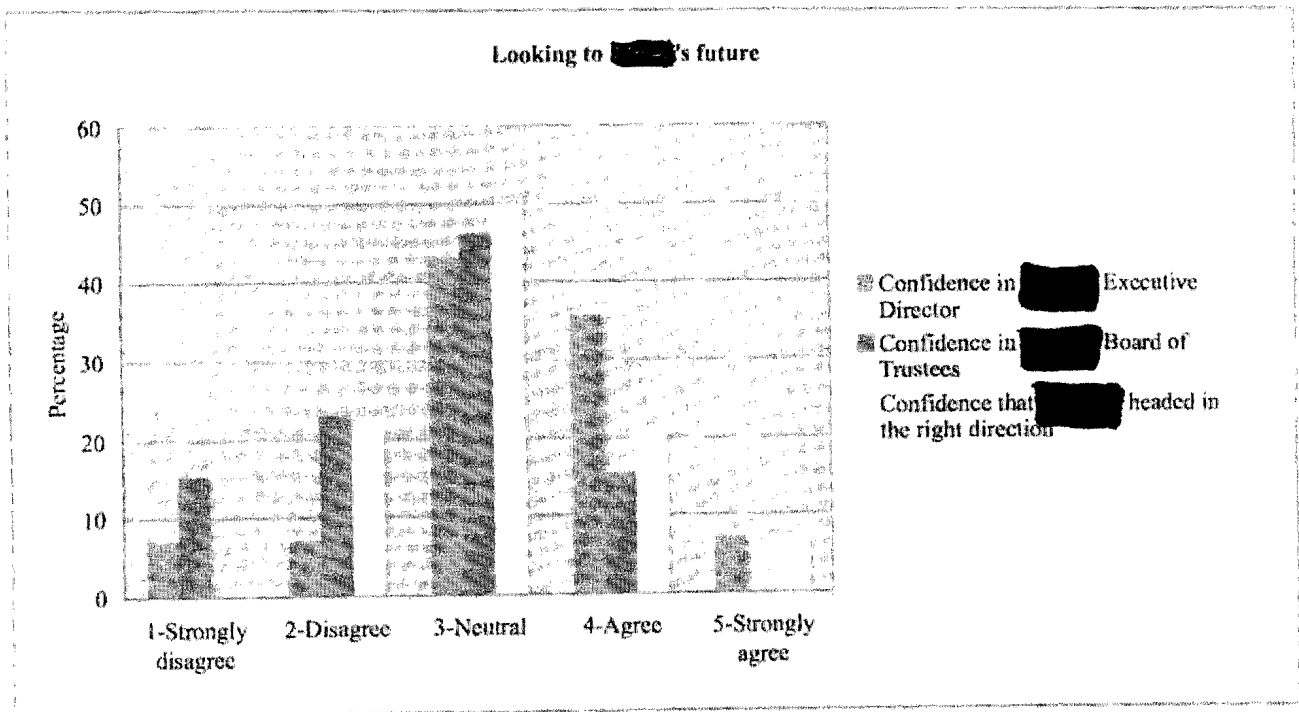
With regard to learning from one's experiences, most staff were neutral (42.9%) or disagreed (21.4%) that reflection and assessment are valued as part of the professional process at [redacted] even fewer felt that time is dedicated for it.

Excellence and ethics

All responses were neutral (57.1%) or positive (42.9%) that [redacted] produces work with a high degree of excellence. The group was slightly less positive that [redacted] values quality of work over quantity of work (14.2% disagreed or strongly disagreed). Staff did feel very strongly (57.1% agreed or strongly agreed) that people at [redacted] act with integrity and ethics. Despite this, there was less a sense that people at [redacted] place the success of the museum above individual interests (35.7% disagreed).

The future

In general, most of the staff believes that [redacted] is headed in the right direction. Confidence in the Executive Director is stronger than in the Board of Trustees.



*A negligible number of "I don't know" responses were affixed a zero value and factored out of the interpretation.

MEMBERSHIP

External Assessment

Methodology

As familiar and often loyal supporters, [redacted] members provided valuable information regarding [redacted] service, values and mission fulfillment.

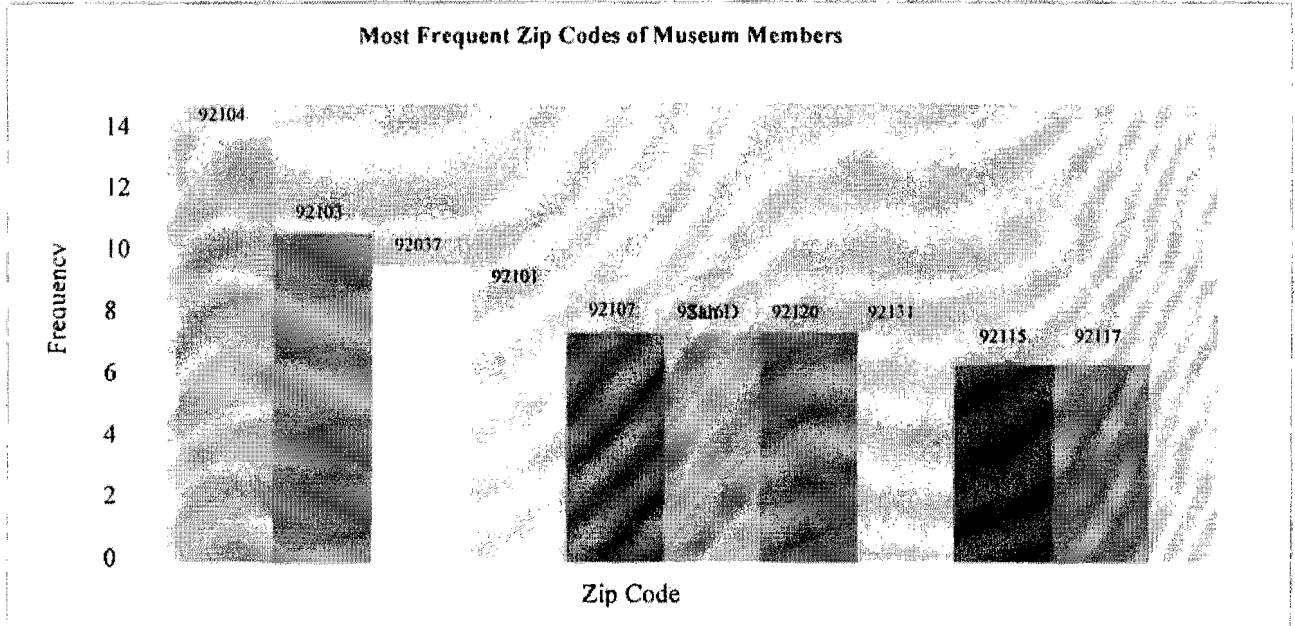
The Membership Survey was composed of 39 questions in e-survey format (Survey Monkey). Through collaboration with staff, an e-blast was sent to the [redacted] members' email list, with a request to complete the survey to improve member satisfaction. Over a period of 14 days, 205 members responded to the survey. Out of 1400 members, this is a return rate of 14.6%.

A copy of the survey's raw data can be found in Appendix E.

Analysis

Member profile

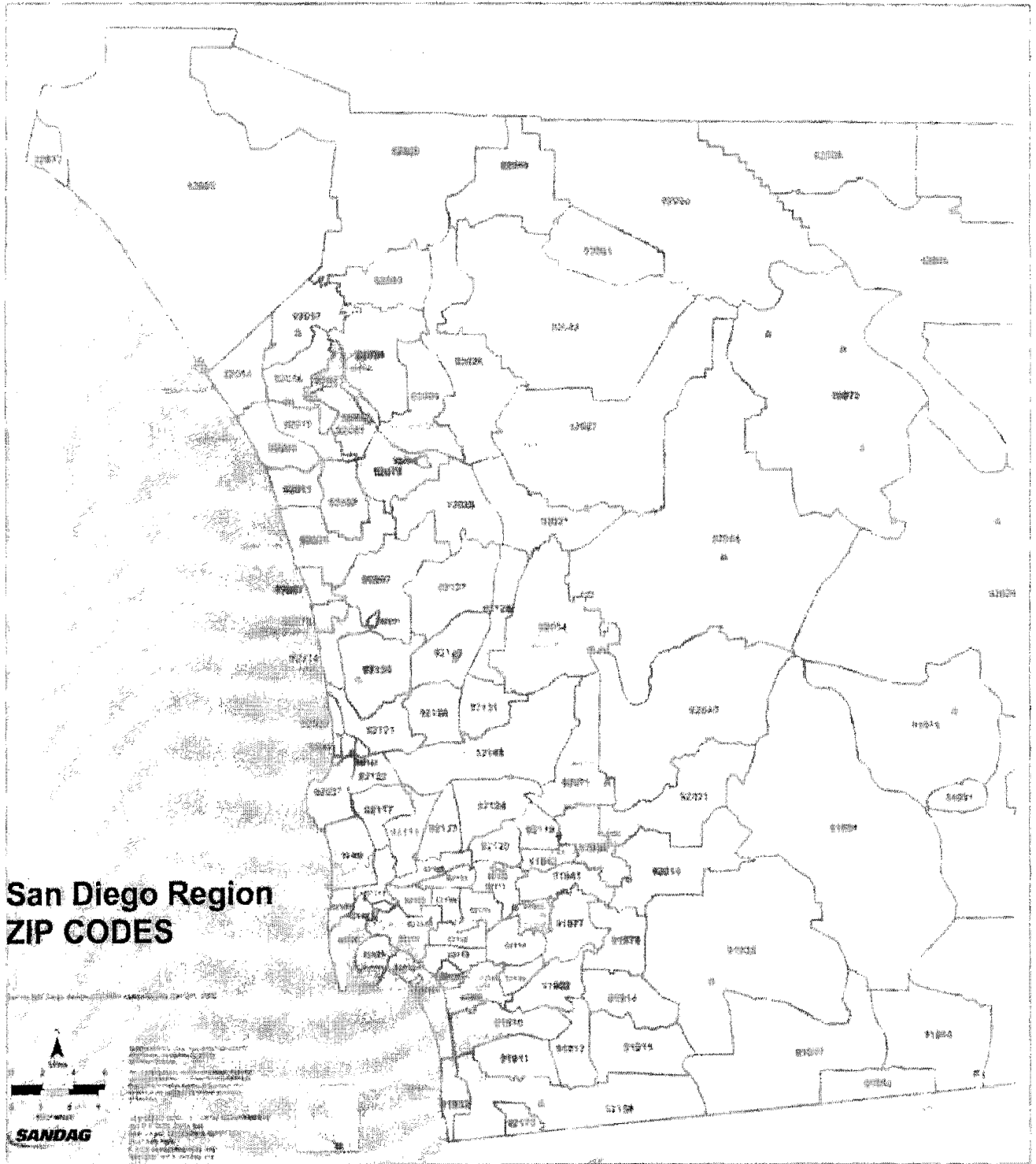
The majority of respondents hold Individual (\$50) and Family (\$75) Memberships, and 45% of respondents have been members for 1-5 years. 90% of respondents are Caucasian and over age 40, with an equal distribution of male and female members. Half of respondents are married, with children over 25.



*For detailed demographic information on residents of 92104, go to:
<http://www.city-data.com/zips/92104.html>

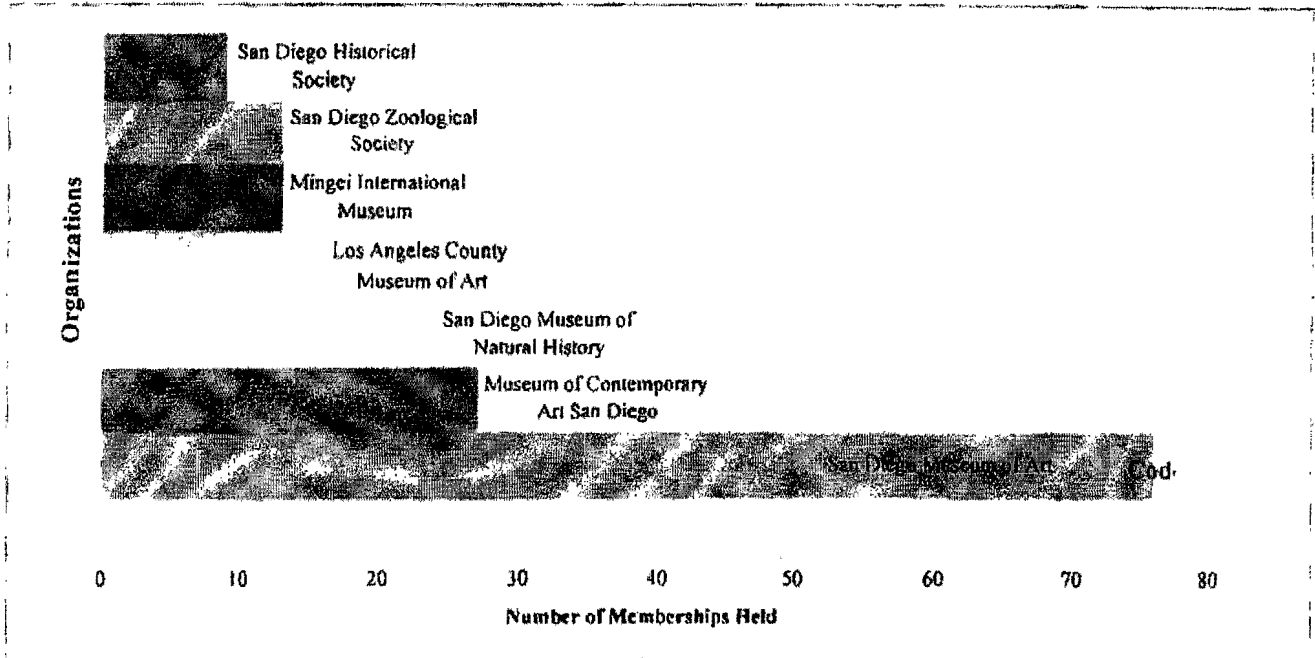
**See Chart B: Zip Codes Map to see where the various zip codes are located

Chart B: San Diego Zip Codes Map



Other memberships held by [redacted] members

Many of [redacted] members hold memberships in other Balboa Park Museums. Perhaps partnerships with these museums would boost participation and potential giving.



Members' income and membership fees

75.1% of respondents reported an annual household income of \$36,000 to \$200,000. This a broad range. Surveys responses indicate that members at the lower end of the spectrum do not feel that there are enough member events appropriate to their income level.

Annual Household Income	% of Respondents
\$ 0 - 35,000	11.8
\$ 36,000 - 75,000	27.3
\$ 76,000 - 100,000	21.1
\$ 101,000 - 200,000	26.7
\$ 201,000 - 300,000	6.2
\$ 301,000 and up	6.8

55.1% of respondents plan to renew their memberships, but only 8.6% plan to upgrade their memberships in 1-3 years. 49% of the group responded that they are not sure if they will give to [redacted] beyond their membership dues. The following comments illustrate a general resistance to make additional donations, or upgrade beyond current membership:

"The way of the events that MOPA sponsors seem beyond the scope of a middle class in student type of member."

"I can't afford to participate in a lot of the museum's activities, so I'm not sure if membership is worthwhile."

"As a retiree I am not in a position that would allow me to upgrade my membership."

Museum content

From their open-ended responses, most members share a love of photography and cinema but would like to see more of the following:

- More film programs
- More exhibitions per year
- More available spaces in members' excursions
- Exhibitions and education programs featuring local, emerging and young artists
- A balanced mix of classical and conceptual photography

Museum store

While 85% of respondents value their membership discount at the Museum Store, the Museum Store received a significant number of "Poor" and "Fair" ratings. Members noted that they would like more store items that correlate to current exhibitions.

Customer service

The majority of respondents felt that [redacted] staff is friendly and informed. However, some comments included requests to better train front desk staff in customer service, and to respond in a timelier manner to job applicants.

The value of [redacted] membership

51.5% of respondents feel that their membership is an excellent value, and feel valued by the Museum as members.

Membership Benefits	IMPORTANCE TO MEMBERS (%)				
	Strongly Agree	Agree	Not Sure	Disagree	Strongly Disagree
Unlimited admission to galleries	55	38	4.5	1.5	1
Members' Only Preview openings	22	40.5	26.5	9	2
Guest and Lecture Passes	38	47	11.5	3.5	1
Reduced admission to special events	29	45.5	16.5	8	1
Reduced admission to educational programs	28	41	23	7	1
Reduced admission to film events	21	39.5	27	10.5	2
Discounts at the Museum Store	29.5	56	9.5	3.5	1.5

Membership Benefits	IMPORTANCE TO MEMBERS (%)				
	Strongly Agree	Agree	Not Sure	Disagree	Strongly Disagree
Receiving [REDACTED] <i>Snapshot</i> , the bi-weekly email update	23.5	50.5	19.5	5.5	1
Access to the new [REDACTED] library	22	36.5	38.5**	2	1.5
Volunteer opportunities	9	28	44.5**	15.5	3
Discounts on <i>B&W</i> and <i>New Yorker</i> magazines	10	27	30**	28	6

** In the comments sections, members wrote that they did not know about this benefit.

Almost 80% of respondents said that they would recommend a **[REDACTED]** membership to their family and friends. Word of mouth is a powerful motivator. Perhaps a referral incentive could be a successful membership tool.

MUSEUM VISITORS

External Assessment

Methodology

The objective of distributing a survey to Museum visitors was to explore the funding potential of this group, as well as to gain an indication of customer satisfaction.

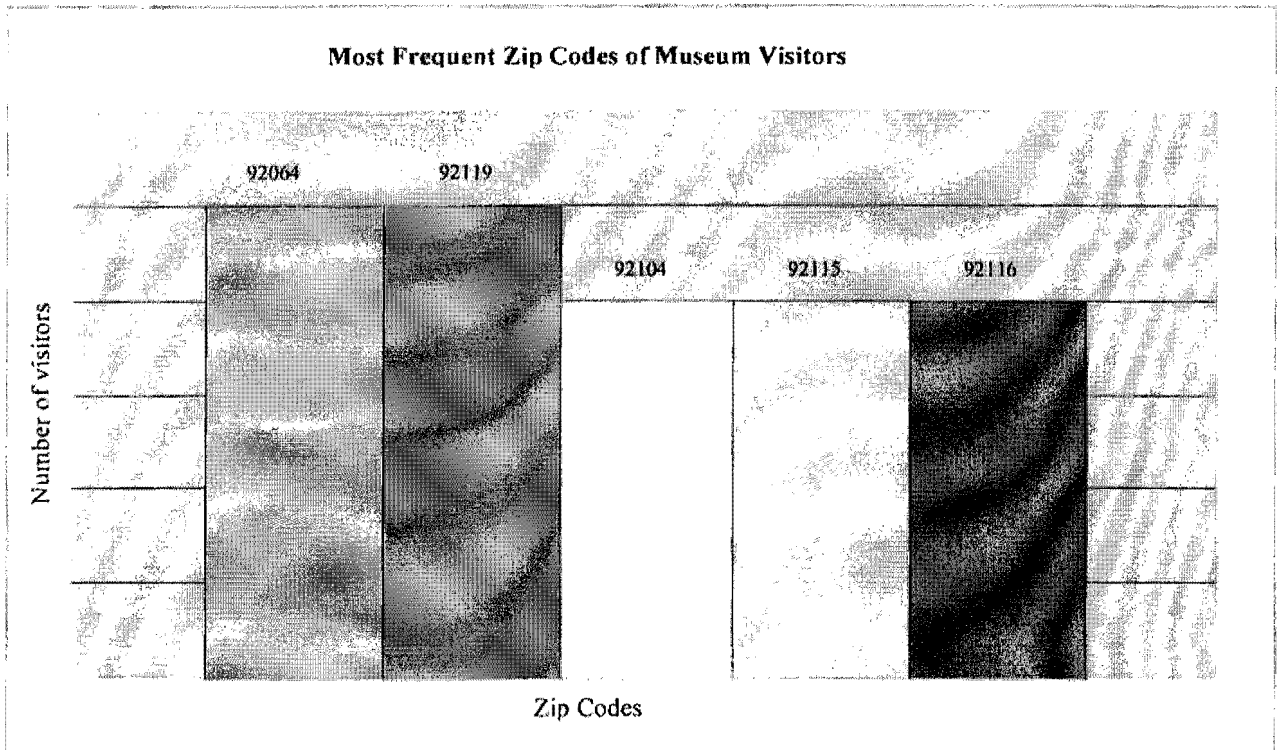
A brief, eye-friendly survey of 13 questions was designed by the [redacted] group and distributed by front desk staff to all visitors for a period of 14 days. A coupon at the bottom enabled survey respondents to receive a 10% discount at the Museum Store upon completion of the survey. 77 completed surveys were collected, and the results were entered into a Survey Monkey survey for tabulation and interpretation.

A copy of the survey's raw data can be found in Appendix F.

Analysis

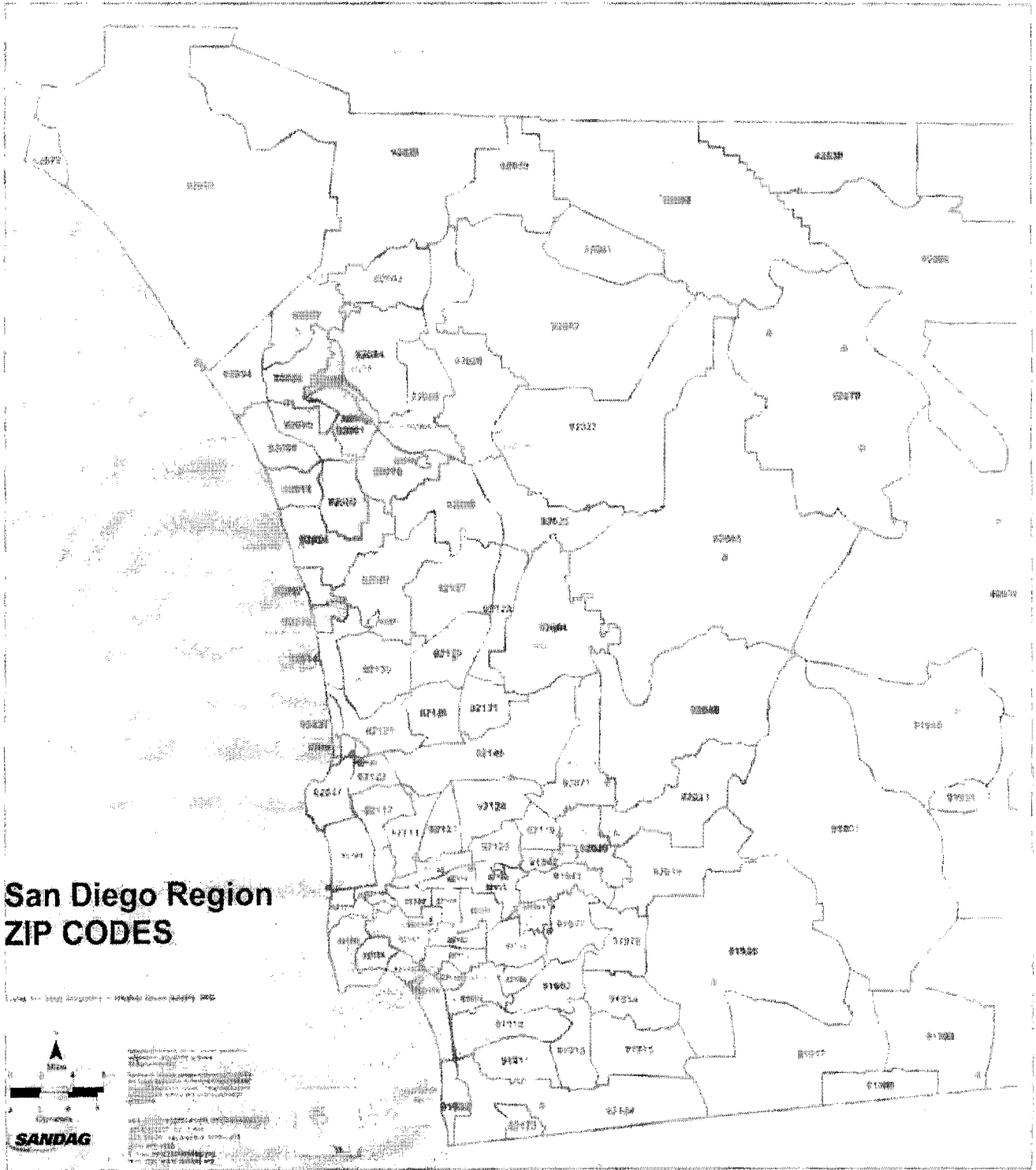
Visitor profile

Over half of the respondents were under age 30, and 86% of respondents were students. After the majority of students, the greatest percentage of visitors work in the arts, media and design fields. 51.9% of respondents were visiting [redacted] for the first time, and 76.6% of respondents had come to specifically see [redacted]'s exhibitions. Over 90% of respondents believed the admissions fee was fair and plan to visit the Museum again.



*Refer to Chart B: San Diego Zip Codes Map on the next page for locations

Chart B: San Diego Zip Codes Map



**San Diego Region
ZIP CODES**

Source: SANDAG, San Diego County, California



University of San Diego
Nonprofit Leadership and Management
MUSEUM BUSINESS PRACTICES SURVEY

Name of Interviewer: _____

Museum: _____

Name of Interviewee: _____

Role of Interviewee: _____

Length of time in this position _____

Institutional Profile

1. What is your museum's operating budget?
2. What is the current value of the museum's total assets minus the collection?
3. What is the size of your museum's endowment?
4. What are your museum's total current liabilities?
5. How many full-time employees does your museum have?
6. How many part-time employees does your museum have?
7. How many volunteers does your museum have?
8. Please describe your museum's collections.

Exhibitions

1. Describe the role of exhibitions in your museum. How do exhibitions relate to:
 - a. the permanent collection
 - b. the museum's mission
 - c. trends and innovations in the field
2. What influences the selection of new exhibitions? Please rate the following from most influential to least influential.
 - a. Trends/ current events
 - b. Audience interest
 - c. Potential revenue
 - d. Scholarship

- e. Funding opportunity
 - f. Donor interest
 - g. Strategic Plan
 - h. Curatorial interests
 - i. Other
3. How are new exhibitions funded? (grants, corporate sponsorship, budget allocation, etc.)
 4. Does exhibition funding support overhead and/or other expenses or activities at your museum?
 5. If so, how are overhead costs assigned to exhibition? (i.e., actual cost or percentage)

Education

1. Describe your museum's current education philosophy and approach to programming.
 - a. How is it aligned with the mission?
 - b. Does your museum have a signature educational program?
 - c. What assessment strategies or tools are used to evaluate programs?
2. What influences the selection of new educational programs? Please rate from most influential to least influential.
 - a. Trends/ current events
 - b. Audience interest
 - c. Potential revenue
 - d. Scholarship
 - e. Funding opportunity
 - f. Donor interest
 - g. Strategic Plan
 - h. Other
 - i. Director interests

3. What is your funding mix for educational programs? (i.e., budget allocation, grants, program revenues)

4. Is it a practice or priority for your museum that programs be self-sustainable? If so, what strategies are used to achieve this?

Finance

1. Describe your budget development process.
 - a. Is it based on a strategic plan?
 - b. What is the timetable used to develop your budget?
 - c. What checks and balances ensure it is a solid plan?
 - d. What data is used to determine resource allocations?

2. What environmental factors are evaluated and monitored to foresee opportunities and threats related to the budgeted plan?

3. What are your sources of earned revenue, ranked in order highest to lowest by percent?

Category	Estimated Percent of Budget
Membership	

Interest from endowment	
Programs	
Admissions	
Education	
Rentals	
Other:	

4. What is your expense allocation by percent?

Category	Percent of Budget
Staffing	
Facility, Rent and Utilities	
Exhibitions	
Educational Programs	
Marketing and Promotion	
Supplies	
Special Events	
Other:	

5. What are your sources of contributed revenue ranked highest to lowest by percent?

Category	Percent of Budget
Annual Appeal (Board)	
Annual Appeal (non-board)	
Interest from endowment	
Grants and Foundations	
Major Gifts	
Special Events	
Sponsors	
Other:	

6. Is your current revenue mix is ideal? Explain why/why not. How would you change it?

7. What is a unique and successful strategy implemented at your museum to increase annual, endowed and special event fundraising?

8. What is a unique and successful strategy implemented at your museum to reduce expenses?

9. What is a unique and successful strategy implemented at your museum to ensure long-term sustainability?

10. What is a unique and successful strategy implemented at your museum regarding the investment and allocation of long-term assets?

11. How does collaborations with other organizations or entities outside of your museum contribute to your museum's financial success?

Marketing

1. What is your member recruitment and retention plan?

2. Tell us about your top marketing strategies and the results they have produced.

3. Describe your current customer. Describe your ideal customer. What tools are you using to attract your ideal customer?

Governance

1. How many Board members does your museum have?

2. Describe your recruitment and orientation process for new board members.

3. What percentage of the Board's time is focused on the following:
 - a. Governance
 - b. Fundraising
 - c. Strategic planning
 - d. Other

4. What role do board members take in the following areas?
 - a. Income generation
 - b. Asset building
 - c. Expense saving

5. What are some unique ways in which Board members have made a positive impact on the museum's business model or long-term sustainability?

Survey Completed By: _____

help us help **YOU**

- Member
- Student
- Senior
- Military

- Is this your first visit to [redacted] Y N
- Did you think the admissions fee was fair? Y N
- Did you come to the park to see [redacted]? Y N
- Will you visit [redacted] again? Y N
- Was the wall text helpful? Y N

- | | Excellent | Very Good | Good | Fair | Poor |
|---|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Ease of finding [redacted] in Balboa Park | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Appeal of art | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Museum Store | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Helpfulness of [redacted] staff | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| MoPA compared to other museums | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Optional:

Age: 10-20 21-30 31-45 46-55 56-70 70 and up

Occupation: _____

Zip Code: _____ Email: _____

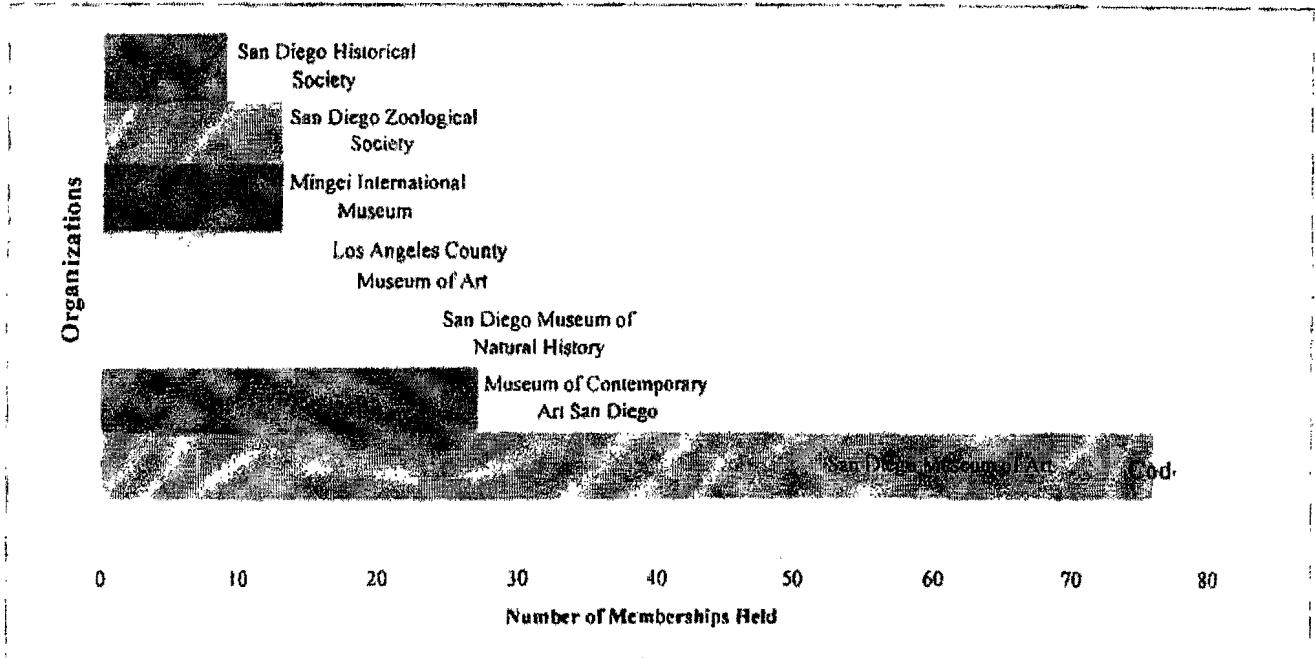
How did you hear about [redacted] _____

Please write any helpful suggestions on the back and drop off this completed survey at the reception desk.

----- Page A 108 -----
**RECEIVE A 10% DISCOUNT IN THE MUSEUM STORE
WHEN YOU COMPLETE THIS SURVEY!**

Other memberships held by [redacted] members

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