



Cabot's Museum Foundation

Strategic Planning Retreat

October 13 & 14, 2012

Desert Hot Springs, California

Facilitated by

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Participants:

Cabot's Museum Foundation:

Mike Chedester	President
John Mahoney	Vice-President & Treasurer
Linda Stevens	Secretary
Lorraine Becker	CMF Board
Tim Radigan-Brophy	CMF Board
Richard Brown	CMF Board
Cynthia Harnisch-Bruenig	CMF Board
David Bruenig	CMF Board
Paul Hietter	CMF Board
Patricia Larsen	CMF Board
Judy Gigante	CMF Docent

Cabot's Museum:

Ginger Ridgway	Cabot's Museum Director
Peggy Pourtemour	Cabot's Museum Registrar
Elle Decker	Cabot's Museum, staff
Gabriele Faber	Cabot's Museum, staff
Courtney Moe	Community Member

City of Desert Hot Springs:

Russ Betts	Councilman
Scott Matas	Councilman
Rick Daniels	City Manager

Facilitators:

Suzanne Huffmon Esber
Becky Foreman

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Focus Question for Strategic Plan

*How can we together as Board, Staff, and the City, over the next 3 years, substantially increase our **resources** for operations, preservation, and exhibit and **land** expansion?*

(The group reviewed the original Focus Question that was suggested for the strategic planning session and made the following changes: The word "revenue" was replaced with "resources" and the word "land" was added. The changes have been highlighted in yellow.)

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Preparing Ourselves for Strategic Planning

Introductory Conversation/Accomplishments

Name one "accomplishment" of Cabot's Pueblo Museum over the past two years.

Accomplishments

- Listed on the National Register of Historic Places
- Moved further into the community
- Through research, uncovered significant new information about Cabot Yerxa and pueblo
- Secured a space for more collection storage
- "Amped up" a major fundraiser
- Advanced City and private partnerships
- Reopened the store
- Empowered the City partnership
- Received grants
- Increased admissions by 40% and merchandise sales by 30%
- Formed Museum Advisory Council (MAC)
- Established MOU with City
- Defined roles in MOU
- Hired a museum director
- Expanded the board
- New information obtained by History Committee
- Worked on a second edition of Cabot's book
- Recruited a professional and passionate board and staff
- Facelift of gift shop completed
- Installed effective systems
- Operated in the black
- Developed standing committees

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Review of Mission Statement

Cabot's Museum Foundation preserves the integrity of Cabot Yerxa's history, pueblo and collection of artifacts to inspire and educate visitors and create appreciation of the desert community.

During the review of the Mission Statement the group raised questions about whether or not the Museum Foundation and the Museum should have two different Mission Statements. The group identified the primary role of the foundation as it exists today is to be stewards of, and fundraisers for the Museum. It was suggested that as the Museum and Foundation continue to evolve it may be helpful to create separate and distinct Mission Statements.

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Review of “The Secretary of the Interior’s Standards for the Treatment of Historic Properties with Guidelines for Preserving, Rehabilitating, Restoring & Reconstructing Historic Buildings” by Kay D. Weeks and Anne E. Grimmer, U.S. Dept. of Interior

Standards for [Preservation](#) and Guidelines for [Preserving](#) Historic Buildings:

Preservation is defined as the act or process of applying measures necessary to sustain the existing form, integrity, and materials of an historic property. Work, including preliminary measures to protect and stabilize the property, generally focuses upon the ongoing maintenance and repair of historic materials and features rather than extensive replacement and new construction.

Key Phrases

- Sustain the existing form, integrity and materials of the historic property
- Ongoing maintenance and repair of historic materials and features rather than extensive replacement and new construction
- Identify, retain and preserve
- Stabilize, consolidate and conserve

Implications for Strategic Planning

- Standards
- Professional guidelines, consultants & experts (ex. Preservation review)
- Quality of work and standards of work
- Air conditioning ducts visible or ability to retrofit with historical and architectural integrity
- Integrity of work

Standards for [Rehabilitation](#) and Guidelines for [Rehabilitating](#) Historic Buildings:

Rehabilitation is defined as the act or process of making possible a compatible use for a property through repair, alterations, and additions while preserving those portions or features which convey its historical, cultural, or architectural values.

Key Phrases

- Historic character
- Use of property historically
- Repair rather than replace
- New additions/alterations will not destroy

Implications for Strategic Planning

- Costs
- Cole's changes
- New additions/alterations will not destroy original state
- Drainage issues (roof)
- Disabled, handicapped access (ADA compliance)

Review of “The Secretary of the Interior’s Standards for the Treatment of Historic Properties with Guidelines for Preserving, Rehabilitating, Restoring & Reconstructing Historic Buildings” (cont.)

Standards for **Restoration** and Guidelines for **Restoring** Historic Buildings:

Restoration is defined as the act or process of accurately depicting the form, features, and character of a property as it appeared at a particular period of time by means of the removal of features from other periods in its history and reconstruction of missing features from the restoration period. The limited and sensitive upgrading of mechanical, electrical, and plumbing systems and other code-required work to make properties functional is appropriate within a restoration project.

Key Phrases

- Retain/preserve materials and features
- Reconstruct/remove based on period
- Choosing significant historic period (name)
- Stabilize and restore rather than replace (gentlest means)
- Document removals outside period

Implications for Strategic Planning

- Research significance of building
- What to do with improvements already done
- Process to make decisions (authority and autonomy)
- Prioritization: Drainage, roof, preservation, safety
- Establishing policy
- Funding – how to?

Standards for **Reconstruction** and Guidelines for **Reconstructing** Historic Buildings

Reconstruction is defined as the act or process of depicting, by means of new construction, the form, features, and detailing of a non-surviving site, landscape, building, structure, or object for the purpose of replicating its appearance at a specific period of time and in its historic location.

Key Phrases

- Recreating non-surviving buildings with new materials
- Duplicate original building’s features
- Work from documentation/info
- Preserve remaining components
- Determine “period of significance”
- Identify contemporary recreations

Implications for Strategic Planning

- Cabot vs. Cole
- Research documents
- Original purpose of building/feature vs. intended contemporary use

Practical Vision

What do we want to see in place in 3 years as a result of our actions?

<p>MUSEUM COLLECTION FULLY INVENTORIED FOR PRESERVATION</p>	<p>ADVOCACY & POSITIONING OF CABOT'S ROLE IN "SAND TO SNOW"</p>	<p>PREMIERE CULTURAL EXPERIENCE</p>	<p>FINALIZED PLANS & SECURED FUNDING FOR NEW CLIMATE CONTROLLED MULTI-PURPOSE BUILDING</p>	<p>RESTORATION & CONSERVATION OF THE EXISTING FACILITIES COMPLETED</p>	<p>EXPANDED EDUCATIONAL EXHIBITS AND TOURS FOR MULTIPLE AUDIENCES</p>	<p>DIVERSE, SUSTAINABLE FUNDING IN PLACE</p>	<p>ORGANIZATIONAL STRUCTURE DEFINED & POSITIONED TO ENSURE THE EXISTENCE OF THE MUSEUM IN PERPETUITY</p>	<p>SUSTAIN-ABLE VOLUNTEER PROGRAM TO SUPPORT ALL MUSEUM OPERATIONS</p>
<ul style="list-style-type: none"> • Museum artifacts catalogued • Collection catalogued and protected 	<ul style="list-style-type: none"> • Partnership completed between Joshua Tree National Park, City and Museum • Funding secured for "Sand to Snow" Visitor's Center • Sand to Snow National Monument 	<ul style="list-style-type: none"> • "Go to" destination for valley cultural tourism • Positioned the museum as a premiere destination • Brand recognition and marketing • Defined the messages • Robust social media presence and campaign 	<ul style="list-style-type: none"> • Climatized exhibition structure for artifacts built • New structure for collection storage & exhibit • Plans & tentative funding for new multi-purpose building • Master plan land has been acquired • Museum café is open 	<ul style="list-style-type: none"> • Flood control resolved • Critical areas are structurally sound • Historical assessment for structures done • Building safety & security solved • Essential building improvements complete • Pueblo structure stabilized & rehabilitated • Indian gallery room finished 	<ul style="list-style-type: none"> • Community education program • Director of development, director of education, curator hired • Created grounds tour with interpretive signage • Indian gallery exhibit open • Rotating, traveling, virtual exhibits • Self-guided tours 	<ul style="list-style-type: none"> • Implemented plan for alternative fund sources (i.e., grants) • Established endowment fund • Annual fundraising consistently raises \$300,000 • Funding secured for "Sand to Snow" Visitor's Center 	<ul style="list-style-type: none"> • Commitment of City post-2014 established • Organizational structure is clearly defined (City and others) • Role definition: total autonomy of Cabot's from the City 	<ul style="list-style-type: none"> • 75 Active volunteers • 50 Trained docents

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One Year Victory Brainstorm

Museum Advisory Council

Honored Senator Feinstein

All board members trained in fundraising

Indian Gallery open

Free Press

Museum policies defined and approved

Roof fixed

100 Members

Money raised for Indian Gallery

Money for Historic Structure Report

Flooding problem fixed

Ground Tours & signage including night tours

Running in the black

15% increase in visitors

Architectural plans & fundraising for multi-purpose facility

30 new volunteers/docents

Land acquisition plan

Marketing plan

\$150,000 in fundraising

A successful Centennial year

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CURRENT REALITY: SWOT & ANALYSIS

<p>Internal Strengths</p> <ul style="list-style-type: none"> ▪ Authenticity and uniqueness of Pueblo ▪ Committed volunteers/board & staff ▪ Passionate professionalism of board & staff ▪ MOU & partnership with City ▪ Good reputation ▪ Promoting visibility ▪ Elementary school named for Cabot ▪ On the National Register ▪ Cabot's Book ▪ Operating in the black ▪ Quality of merchandise and growing reputation ▪ Ability to put on signature events 	<p>External Opportunities</p> <ul style="list-style-type: none"> ▪ New partners ▪ Potential allies and supporters outside of DHS ▪ Offsite programming ▪ Centennial year ▪ Book publication ▪ Virtual tour of facility ▪ New donors ▪ Working with other museums ▪ Recruiting all visitors to be members ▪ Connection to teachers ▪ Service Club relationships (speakers at meetings) ▪ Every Cabot Elementary student gets Cabot's book
<p>Internal Weaknesses</p> <ul style="list-style-type: none"> ▪ Lack a "case statement" for support ▪ Takes time to put fundraising plans in place ▪ Limited fundraising experience ▪ Shortage of volunteers ▪ Thinly resourced in staff ▪ Heavy workload ▪ Foundation lacks executive director ▪ Limited indoor space for exhibits ▪ Appropriate collections space lacking ▪ Noncompliance with National Register guidelines ▪ Limited skills & professional expertise (i.e., legal, etc.) 	<p>External Threats</p> <ul style="list-style-type: none"> ▪ Image of Desert Hot Springs ▪ Mother nature and elements (rain damage) ▪ Continued economic weakness ▪ Safety & security of building ▪ Wiring not up to code ▪ Collections at risk due to exposure & damage ▪ Overuse and damage of Pueblo as result of increased visitation ▪ Collection is being damaged right now ▪ Theft/loss of collection (internal fraud protection)
<p>Reflection on SWOT</p>	
<p><i>Where do we need to invest to take advantage of our strengths and utilize our opportunities?</i></p> <ol style="list-style-type: none"> 1. Fundraising/grants 2. Authenticity & uniqueness of Pueblo 3. Board recruitment 4. National Register of Historic Buildings 5. P.R. & Marketing 6. Advocacy 7. Friendraising 	<p><i>In light of our weaknesses and opportunities, where do we need to be cautious?</i></p> <ol style="list-style-type: none"> 1. Inviting/recruiting qualified board members 2. Overstating what we can accomplish in fundraising 3. Not spending all of our resources on threats at the expense of growth 4. Dependence on government/city funding & resources 5. Hiring staff without sustainable support (costs exceed benefits) 6. Greater volume of work & responsibility for staff 7. Volunteer burnout

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**COMMITMENT:
ACCOMPLISHMENTS FOR 2012 – 2013**

1. Flood control system in place
2. A system in place to protect buildings and collection from rain
3. Parameters secured for Cabot's in "earmarks" and "Sand to Snow"
4. Parking lot hardscaped
5. Plan and execute a successful Centennial year
6. 30 volunteers in place
7. Monthly public comments at City Council meetings reporting on Cabot's
8. Inventory of artifacts completed (so that we don't lose sight of earmarks)
9. 20% increase in donations
10. 10% increase in revenue excluding donations
11. Effective wayfinding system in place
12. Roles & Policies of M.A.C. defined
13. Marketing plan completed and implemented
14. Grounds tours and grounds signage in place
15. Museum policies defined and approved

**Strategic Directions & One Year Accomplishments by Quarter
with Implementation Team Assignments**

Overall
Coordinators:
Mike, John

	Quarter I Oct. – Dec. 2012	Quarter II Jan. – March 2013	Quarter III April – June 2013	Quarter IV July – Sept. 2013
Preserving & Protecting our Museum	<ul style="list-style-type: none"> • A system in place to protect buildings and collection from rain (Ginger, Judy) • Effective wayfinding system in place (Tim, Russ, Lorraine) 			<ul style="list-style-type: none"> • Flood control system in place (Ginger, Russ, Judy) • Parking lot hardscaped (Scott, Mike) • Inventory of artifacts completed (Peggy, Pat, Judy, Barbara, Richard)
Advancing & Positioning our Museum	<ul style="list-style-type: none"> • Roles & policies of M.A.C. defined (M.A.C.) • Parameters secured for Cabot's in earmarks and Sand to Snow (Rick, Lorraine, Scott) 	<ul style="list-style-type: none"> • Museum policies defined and approved (Ginger, Peggy, Elle) 		<ul style="list-style-type: none"> • Monthly public comments at City Council meetings reporting on Cabot's (Mike, Tim, John)
Enhancing our Resources		<ul style="list-style-type: none"> • 30 Volunteers in place (Ginger, Elle, Tim, Judy, Barbara, Dave) • Grounds tours and grounds signage in place (Mike, Barbara, Judy, Pat, Dave) 	<ul style="list-style-type: none"> • 10% increase in revenue excluding donations (Gabrielle, Elle, John) • 20% increase in donations (Tim, Lorraine) • Marketing plan completed and implemented (Mike, Barbara, Linda, Elle) 	<ul style="list-style-type: none"> • Centennial event planned and executed (Scott, Lynda K., John, Pat, Barbara, Richard, Paul, Gabrielle, Elle)

SAMPLE IMPLEMENTATION PLAN

Strategic Direction:

Accomplishment (What):

Intent (Why):

Implementation Steps (How)

Who

By When

Team Members:

Resources Needed:

Team Coordinator:

Collaborators:

Tips for Keeping Your Plan On Track

- Identify who is overall coordinator of plan.
- Have a Team Coordinator for each accomplishment.
- Develop an implementation plan for each accomplishment as soon as possible.
- Schedule regular progress reports from teams: online document sharing, conference calls, in person meetings.
- Build accountability, coordination and reporting into existing meetings.
- Create spontaneous celebrations when accomplishments are completed.
- Hold a 6-month evaluation & refinement session