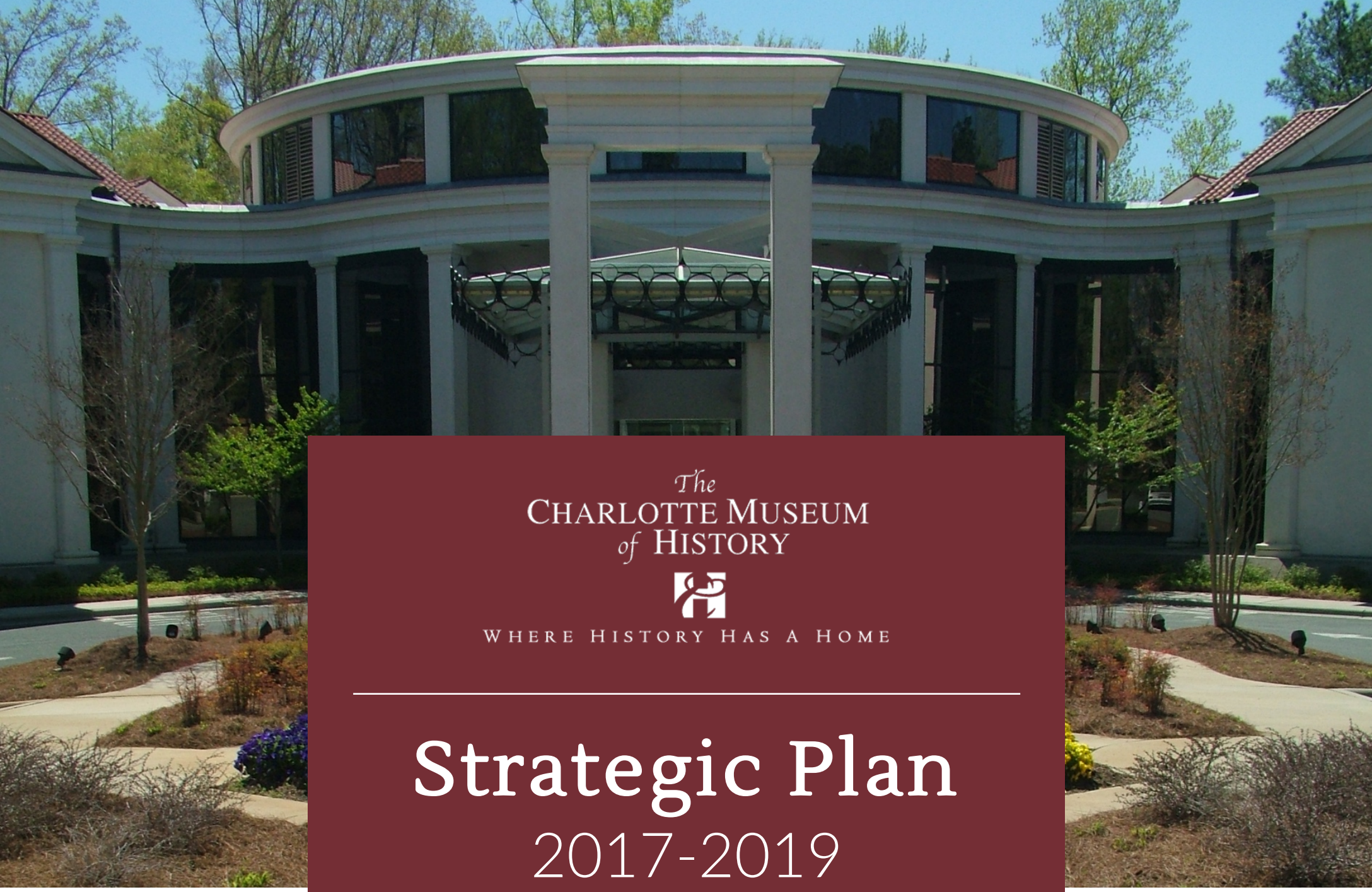

The Charlotte Museum of History

WHERE HISTORY HAS A HOME

Strategic Plan
2017-2019

FEBRUARY 2017

Welcome

Charlotte Museum of History Strategic Plan

Kay Peninger
Executive Director

Paul Kurzeja
Chair
Board of Directors

For the Charlotte Museum of History, 2016 was a turning point. The museum is a cultural institution for east Charlotte and the city at large, offering educational programming for thousands of children, teens and adults; tours; community activities, and permanent and traveling exhibits.

Our history

Today's Charlotte Museum of History building opened in 1999 but the institution's roots date to the 1940s. The museum and its grounds are home to Mecklenburg County's oldest surviving structure, a 1774 stone house built by early settler Hezekiah Alexander. In 1949 the Daughters of the American Revolution began work to preserve and restore the house, and today the Hezekiah Alexander Home Site is on the National Register of Historic Places and, like the museum building, is open to the public five days a week.

Today

During 2016, with the community's help, we added to our robust programming and completed critical preservation projects for the Hezekiah Alexander Home Site. We successfully merged with Historic Charlotte, which shares a passion for preserving our community's built environment and unique history.

With solid revenues, a great staff and a strong and growing base of support, the museum is positioned to move forward with a new strategic plan developed during fall 2016.

Strategic planning

The museum engaged PMA Consulting, LLC to lead a comprehensive strategic planning process to determine strategic issues, build consensus around long-range goals, create alignment between the museum and its stakeholders, and develop an actionable plan for growth and development.

Thank you

The Board of Trustees is grateful to the Arts & Science Council for its generous financial support for this planning process and to all the stakeholders whose thoughtful input helped create this plan.

Culture For All.

Vision

To engage the community in the history of our region through exhibits, programming, dialogue, stories and preservation.

Mission

The Charlotte Museum of History interprets and preserves Charlotte's unique history, enriching the community through shared understanding of the past and inspiring dialogue about the future.

Guiding Principles

The Charlotte Museum of History values:

- Fiscally responsible operations.
- Inclusivity and outreach to Charlotte's diverse communities.
- Engaging, interactive educational programs.
- Collaboration and community partnerships.
- Focus is external, on the customer and the community.
- Creativity and an entrepreneurial spirit.
- Accountability, with measured outcomes and impacts.
- Strong stewardship of entrusted resources.
- Preservation of the Hezekiah Alexander Home Site as an important historical site and powerful setting for educational programming, and preservation of Charlotte's built environment as a significant cultural resource.

Strategic Goals

2017 - 2019

Historic Preservation

1

Education & Collaboration

2

Organizational Sustainability

3

1

Historic Preservation

Strategic Goal

Position the Museum as the educational institution that preserves and shares the rich history of Charlotte and Mecklenburg County.

Increase community presence and engagement

Preserve and enhance museum facilities

1

Historic Preservation

Strategic Goal

Increase community presence and engagement

- Develop and implement a communications plan focused on increasing visibility and sharing the history of the Charlotte region
- Engage Charlotte-area residents in building civic pride in Charlotte's rich history
- Expand and further engage the Board of Trustees
- Create a Board of Advisors to serve as community advocates
- Recruit a network of volunteers to act as receptionists, greeters, docents, etc.
- Cultivate and expand the Young Affiliates Society
- Create a "pop-up" exhibit that can travel throughout the city

1

Historic Preservation

Strategic Goal

Preserve and enhance museum facilities

- Develop a plan for improving and maintaining museum facilities
- Preserve and promote the Hezekiah Alexander Home Site
- Position the museum's location as a strength and continue marketing its facilities as a venue for diverse community events
- Create an exciting and flexible learning environment enhanced by relevant exhibits and current technology

2

Education & Collaboration

Strategic Goal

Create an exciting and compelling visitor experience with an engaging and interactive learning environment that is flexible and responsive with a mix of permanent and changing exhibits and programs.

Enhance the museum experience

Preserve and enhance museum facilities

2

Education & Collaboration

Strategic Goal

Enhance the museum experience

- Enhance visitor services
- Develop, design, and create a permanent exhibit highlighting the history of Charlotte and using current digital technologies
- Build on the museum's physical collections and artifacts related to the history of Charlotte, including hands-on experiences, especially for children
- Continue hosting traveling or loaned exhibits

2

Education & Collaboration

Strategic Goal

Preserve and enhance museum facilities

- Actively seek collaborative partnerships to provide a richer visitor experience and build capacity
- Cultivate and strengthen the relationship with Aldersgate leadership as a strategic partner
- Continue partnership with Charlotte-Mecklenburg Schools, maintaining our valued grade-level educational programs that can attract local funding

3

Organizational Sustainability

Strategic Goal

Ensure the future of Charlotte Museum of History.

Maintain a balanced operating budget

Create and implement a comprehensive development plan

3

Organizational Sustainability

Strategic Goal

Maintain a balanced operating budget

- Increase revenue earned through memberships, admissions, program income, facility rentals, and gift shop revenue
- Create a cost/benefit analysis of all events and programs and focus on those which have maximum impact
- Create procedures to ensure accuracy and consistency in financial reporting
- Evaluate operations currently being outsourced
- Ensure that current staff have skill sets aligned with priorities, and use volunteers where they can make an impact

3

Organizational Sustainability

Strategic Goal

Create and implement a comprehensive development plan

- Add a director of development to manage fundraising and assist with marketing
- Increase contributed revenue through annual giving, events, major gifts, planned giving, and donor stewardship
- Utilize Talisma software to enhance operational efficiencies
- Identify naming opportunities at the museum, including programmatic and facility opportunities

Implementation

Timeline & Responsibilities

2017

Year 1

Conduct a board survey to assess trustees' interests and expand engagement	Strategic Planning
Develop and implement a plan for matching the Yoder Challenge Gift	Development
Refine procedures to ensure clarity and consistency in financial reporting	Finance
Recruit and retain a director of development; create comprehensive plan	CEO/Development
Develop a plan for improving and maintaining museum facilities	Building and Grounds
Develop and approve a two-year plan for permanent and revolving exhibits	CEO/Program
Develop a plan for expanding physical collections and artifacts	CEO/Program
Cultivate a relationship with Aldersgate	Chair/Vice Chair
Identify and begin cultivating community leaders as potential board members	Development
Conduct a cost-benefit analysis of all museum programs and events	CEO/Program
Review and adjust internal operations; evaluate operations now being outsourced	Finance
Develop and approve a comprehensive communications plan	Development

Implementation

Timeline & Responsibilities

2018

Year 2

Refine organizational plans, goals, metrics, and measures	Strategic Planning
Continue the mandate to increase earned and contributed revenue	Finance
Continue to strengthen board and build engagement	Development/Governance
Continue refurbishing museum building	Building & Grounds
Create a Board of Advisors	Development
Cultivate and expand the Young Affiliates Society	Development
Develop and implement a plan to recruit and retain volunteers	Development
Develop and implement a plan for membership growth	Development

Implementation

Timeline & Responsibilities

2019

Year 3

Focus on execution and implementation of strategic plan and identified goals	Board/Staff
Continue to refine organizational plans, goals, metrics, and measures	Board/Staff
Assess museum readiness for a comprehensive capital campaign in conjunction with the 250th anniversary of the Hezekiah Alexander Home Site	Board/Development
Develop a three-year strategic plan for 2020-2022	Board/Strategic Planning
Focus on execution and implementation of strategic plan and identified goals	Board/Staff
Continue to refine organizational plans, goals, metrics, and measures	Board/Staff

Process Overview

Strategic Planning

The Charlotte Museum of History's Strategic Plan was informed by the ideas and insights of numerous community individuals committed to the museum and to preserving local history. The assessment process included:

One-on-one in-person or phone interviews with	19 current and former board members, donors, community leaders, and local historians
Facilitated sessions with	CMH Board of Trustees, CMH Strategic Planning Committee, CMH Development Committee
Surveys completed by	14 CMH board members
Comparative and best practice research of	6 history museums/organizations

BOARD OF TRUSTEES

Thank you to the 2016-2017 Board of Trustees for leadership throughout this process:

Paul Kurzeja, Chair
Mary Newsom, Vice Chair
Eric Cottrell
Dr. Hugh Dussek
Fannie Flono
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Dr. Brian Jones
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