

STRATEGIC PLANNING TEAM

BOARD

Jack Schmidt  
*Board Chair*

Linda Lanier  
*Planning Co-Chair*

Randy Hayes  
*Planning Co-Chair*

Brant Lambert

COMMUNITY/VOLUNTEERS

Trish Roberts

John Bryan

Leslee Burch

Katie Rider

Bill Rotchford

Clyde Simpson

STAFF

Chris Hoffman  
*Executive Director*

Brittany Cohill  
*Museum Operations Manager*

3-YEAR STRATEGIC PLAN  
EXECUTIVE SUMMARY

## SITUATION ASSESSMENT

### AREAS FOR IMPROVEMENT

- Preservation/safeguard/protect: lack of adequate preservation, archiving, research, collection and storage
- Sustainability: capital campaign plan, endowment, short-term grants (writers), facilities improvements
- Permanent exhibit: accessibility, state, technology
- Awareness/visibility: multiple identities, inconsistent look/feel
- Use of technology

### STRENGTHS

- Diverse range of experiences offered: i.e., events, programming, activities, exhibits
- People: Board, Executive Director, staff and volunteers: strong, engaged, talented
- Positive public awareness and perception
- Focus on preservation of Beaches history
- Community engagement: engaging the community in events and activities that bring people together

### OPPORTUNITIES/THREATS

- Ever-changing technology
- Competing for people's attention
- Better alignment with City of Jacksonville Beach-focus more on family friendly
- Decline in streams of revenue
- Donor fatigue
- Make-up of the community-relationship to the Museum
- Differences within the Beaches (demographics, etc. . .)

## M I S S I O N

To preserve and share the distinct history and culture of the Beaches area.

## V I S I O N 2 0 2 5

We are the bridge from past to present, inspiring a sense of place and are embraced by the community as its connection to history, culture and one another.

## C O R E V A L U E S

- Understanding our distinct history helps to shape our future.
- Fostering and instilling a sense of belonging creates community.
- Acting with integrity provides a pathway to trust.
- Striving for excellence in all we do inspires pride.
- Working together, we do more and do it better.
- Evolving and thinking differently allows us to remain relevant.
- Providing diverse opportunities creates an environment that welcomes all.

GOAL 1	GOAL 2	GOAL 3	GOAL 4
Enhance pride of ownership	Expand acknowledgement of our organization's value	Increase appreciation of our heritage	Secure and sustain financial stability
STRATEGIC ISSUE	STRATEGIC ISSUE	STRATEGIC ISSUE	STRATEGIC ISSUE
<p><b>Relevancy</b> <i>How do we engage people in a meaningful way?</i></p>	<p><b>Know Us/Awareness</b> <i>How do we effectively connect our community to our mission?</i></p>	<p><b>Archives, collections, and architectural buildings</b> <i>How do we grow, preserve, protect, and showcase our archives, collections, and historic buildings?</i></p>	<p><b>Sustainability</b> <i>How do we generate and allocate financial resources?</i></p>
CORE STRATEGIES	CORE STRATEGIES	CORE STRATEGIES	CORE STRATEGIES
<ul style="list-style-type: none"> <li>• Improve participants' experience: Customer service and level of excellence.</li> <li>• Increase opportunities for participation beyond the typical museum setting.</li> <li>• Expand our reach with younger audiences:                             <ul style="list-style-type: none"> <li>– School age (education-based field trips)</li> <li>– Younger audience age 25-45</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Develop, fund and implement a comprehensive, integrated marketing communications plan.</li> <li>• Develop and implement a membership strategy.</li> </ul>	<ul style="list-style-type: none"> <li>• Develop and implement a plan for better utilization of existing space.</li> <li>• Develop a rolling 5-year plan and identify and allocate resources to address capital and maintenance needs.</li> <li>• Serve as a resource in identifying opportunities for historic recognition.</li> </ul>	<ul style="list-style-type: none"> <li>• Create and implement an integrated fund development plan to include:                             <ul style="list-style-type: none"> <li>– Gala/fund raising activities</li> <li>– Sponsorships</li> <li>– Enhance relationships with current donors</li> <li>– Cultivate new larger donors</li> <li>– Planned giving</li> <li>– Review levels of giving</li> <li>– Explore monetizing the collection</li> </ul> </li> <li>• Create an endowment plan.</li> <li>• Develop and implement a plan for being more proactive with rental income.</li> </ul>

Note: Goals and core strategies are not in priority order.

## M E T R I C S

- Increase in attendance: per event/activity, per individual
- Increase membership
- Increase media hits
- Shift in revenue mix
- Increase in revenue: including number of people who donate as well as an increase in dollars per donor
- Increase in knowledge/requests for information
- Survey feedback from stakeholders around appreciation and sense of pride (qualitative)

## A C T I O N P L A N S

Small planning teams will develop action plans that provide details for objectives, major activities, timeframes, responsibilities, and needed investments that support the core strategies identified in the Plan. Action plans will be ready by mid January 2018.

## M O N I T O R I N G & E V A L U A T I N G

A monitoring and evaluation process will be instituted at the Board and staff levels. The format and content of Board and staff meetings will be designed around the framework and implementation of this Plan. A strategic metrics dashboard tool will be developed by and for the Board. Staff will use the action plans with metrics as a way of monitoring and evaluating on a regular, ongoing basis. The Strategic Plan is a living document and is intended to be a roadmap for the next three years.

[WWW.BEACHESMUSEUM.ORG](http://WWW.BEACHESMUSEUM.ORG)