

San Diego Natural History Museum

2002–2012
STRATEGIC PLAN

Executive Summary

Adopted by the
San Diego Natural History Museum
Board of Trustees

September 5, 2002

Dedicated to the memory of museum trustees

Captain Charles A. Guthrie
1920–2002

and

Paul Ecke, Jr.
1925–2002

whose vision guided fulfillment of the 1992–2002 strategic plan
and development of this document

EXECUTIVE SUMMARY

On July 11, 2002, the Board of Trustees of the San Diego Natural History Museum accepted the 2002-2012 Strategic Plan. The Plan consists of 6 Key Result Areas (KRA's) of major focus and effort, 26 Objectives, 80 Strategies, 80 Action Plans, and 624 Action Steps. The KRA's, Objectives, and Strategies are dealt with in this report and the Action Plans can be accessed on the Museum's website (www.sdnhm.org). The Board of Trustees adopted the Strategic Plan on September 5, 2002.

The Strategic Planning Team consisted of 24 core team members and 4 consultants. Of these, 7 are senior staff, 7 are from the current Board of Trustees, 3 are former trustees, and 7 are from the business and educational community-at-large. In addition to the Core Planning Team, the entire Board of Trustees (25), as well as all full-time staff (80), were asked for input for their respective departments in departmental meetings, as well as for the Plan as a whole via the Museum's internal staff website. Each KRA was assigned to a committee to develop Objectives, Strategies, and Action Plans. The committees were comprised of trustees, staff, and community members invited for their expertise. The total number of committee participants was approximately 130. The total person/hours invested in the creation of this Plan is in excess of 4000 hours.

In order to provide critical background information for planning participants, the following research studies were conducted by market and visitor research firms Campbell/Mithun, Artsmarket, Institute for Learning Innovation, or museum staff:

1. Member Survey and Analysis – Artsmarket – June 2002.
2. Economic and Demographic Data Representing the San Diego Area – Campbell/Mithun – January 2002.
3. Education Professionals Qualitative Research – Campbell/Mithun – November 2001.
4. Conservation Organizations Qualitative Research – Campbell/Mithun – November 2001.
5. Minority Community Leadership Qualitative Research – Campbell/Mithun - December 2001.
6. Latino, Asian, and African-American Qualitative Research – Campbell/Mithun – November 2001.
7. Front-end Evaluation for Permanent Exhibits – Institute for Learning Innovation and Museum Staff – November 2001.

A fact-finding trip was taken by 6 senior Museum staff members to the following Museums as part of the planning effort:

- The Field Museum, Chicago
- Peggy Notebaert Nature Museum, Chicago
- John G. Shedd Aquarium, Chicago
- Milwaukee Public Museum, Milwaukee
- Science Museum of Minnesota, St. Paul
- Minnesota Children's Museum, St. Paul
- Bell Museum of Natural History, Minneapolis

To help with the planning of the Biodiversity Research Center of the Californias, a 2-day workshop was held in La Paz, Baja California Sur, Mexico, on November 8 and 9, 2001. Participants consisted of 16 Mexican scientists and conservationists, 4 museum board members, and 7 museum research staff. Subjects discussed were:

1. Research Priorities
2. Research Collaborators
3. Coordination of Research with Conservation Priorities
4. Potential Funding Sources
5. Research Symposia and Publications
6. Need for a Field Research Station
7. Collaboration through MOU's
8. External, Internal Threats
9. San Diego Natural History Museum Research Position Priorities
10. San Diego Natural History Museum Bioinformatics Need

In addition, Mr. Robert B. Sharp, Development Consultant, participated as a Planning Team Member and prepared a report analyzing past development success. Mr. Sharp is currently conducting a Capital Campaign Planning Study to inform the planning of a new Capital Campaign to provide funding for the 2002-2012 Strategic Plan.

CHALLENGES

The most difficult challenge with this project was finding the time to devote to planning in the midst of building construction and an extremely busy program schedule. However, planning days were a wonderful respite from day-to-day activities, and the vision that began to emerge almost from the beginning was exciting and inspirational. We had focused so long on building facilities and infrastructure that a vision of future programs, operations, and endowments was seen as "what we are really all about" and in fact, doable at a level formerly undreamed of because of our success with the Capital Campaign. In fact, we were aware of the typical institutional "post-partum" letdown after construction, and the Strategic Planning process helped to lessen the impact due to its future focus.

Finishing the 2002-2012 Strategic Plan was the last Action Plan remaining from the 1992-2002 Strategic Plan. We were so successful with that Plan that we realized the dangers of being "vision-less" even for a short period of time, and we were simply determined to meet the deadline established ten years earlier. It required a tremendous effort, freely given, on the part of trustees, staff, and volunteers.

LESSONS LEARNED

1. Strategic planning is essential to the long-term health of our organization because it provides constant and consistent vision to all of our constituents.
2. Strategic planning must involve a cross-section of all of our constituents to be effective. It simply cannot be imposed from the top down and be effective.
3. We believe in 10-year strategic plans that make us "stretch" hard to accomplish our goals. Raising capital, gaining momentum, and sustaining worthwhile activities take a great deal of time and effort in our organization.
4. Binational, bicultural programs are built on relationships developed over a long period of time. Effective programs work best as real partnerships built on trust. Even when participation cannot be equal, each party must participate in all aspects of the partnership.

5. There is never a convenient time to plan. It simply must be scheduled and completed on time even if it requires heroic effort.
6. Strategic planning must be followed by annual business plans that accomplish the goals established in the plan. Board and staff review of progress and accomplishments, as well as difficulties and changing circumstances, must be scheduled every two years.
7. The strategic plan must be communicated throughout the organization and at regular intervals to be effective. It must also be communicated outside of the organization to raise interest and funds to support it.
8. The strategic plan must contain several very strategic and exciting overarching goals that incorporate daily activities to be visionary and inspirational. Incremental goals are best met with annual business plans.

Serious strategic planning takes a huge commitment of resources both financial and human. It can be one of the single most important activities of an organization if the proper attitude and commitment is shared by the Board of Trustees, as well as senior staff of the organization.

Strategic planning requires an expertise and a disciplined process that few organizations have readily available on staff. We used the same consultant (Robert F. Smith, Strategies & Teams, Inc.) that we used ten years ago to provide continuity and “apples-to-apples” comparison. However, use of the internal staff website was a technological upgrade that allowed for more participation by staff, trustees, museum members, friends, and volunteers. It will also help with the dissemination of the plan.

Without the proper commitment of financial resources and human resources, as well as a commitment to truly ask for and receive help from a broad cross section of the organization’s constituency, other types of planning are recommended. Done well, strategic planning is one of the most exciting and rewarding activities of an organization – one capable of initiating major changes.

MISSION AND PURPOSE; VISION AND NICHES

As testament to the efficacy of our 1992-2002 Strategic Plan, we found that our Mission and Purpose, as well as Niches, did not change substantially. What did change, however, was our Vision. The earlier plan was devoted to improving the organization and our facilities, while this plan builds upon that infrastructure to provide research and educational programs to the people of our region. That will require new knowledge, new tools, new partners, and another sustained effort. This 2002-2012 Strategic Plan is the “road map” to achieving our new Vision.

OUR MISSION

To interpret the natural world through research, education, and exhibits; to promote understanding of the evolution and diversity of southern California and the peninsula of Baja California; to inspire in all people respect for the environment.

OUR PURPOSE

- To emphasize our unique and diverse region while maintaining a global perspective;
- To collect and preserve scientific specimens for research and as a continuous record of the changing world for future generations;
- To serve as a center for the scientific study of biological diversity and evolution;

- To provide dynamic leadership in natural history and environmental education through exhibits, publications, and educational programs, striving to make this outreach relevant to all the people of southern California and Baja California.
- To foster cooperative efforts in natural history research and education throughout our region and the world.

OUR VISION

As we look toward the future, our vision is focused through dual lenses: close-up, on our region, and distant, toward the national and international impact of our efforts.

By 2012, the San Diego Natural History Museum will be internationally known, respected, and emulated as the finest regional center of natural science collections, research, exhibits, and educational programming. We will be cited as the model of a regional museum that, through its continued evolution as a learning organization, stays relevant to its audience and enjoys a firm foundation of community loyalty and sustainable fiscal support.

We will be leading the effort to document, understand, and raise awareness of our region's biodiversity, working collaboratively with other organizations to preserve it. Our diverse onsite, offsite, and online audiences will discover a personal "sense of place" in nature through meaningful and enjoyable lifelong learning opportunities. Inspired by this connection to nature forged by the Museum, our audiences will become critical thinkers and take action, passing their love of the region down to future generations as an ongoing legacy of environmental stewardship.

OUR NICHES

- Collections-based natural science research and education.
- Timely environmental information relating natural history to present-day environmental and cultural issues.
- "Sense of Place" education programs.
- Comprehensive teacher training and science curriculum development for schools.
- Dynamic national and international natural history exhibitions.
- Science literacy for the broad range of our constituents.
- Diverse offerings of family educational opportunities.
- Accessible regional environmental resource with in-depth collections, computerized central database, natural science library, and diverse natural history research interests.
- Biodiversity research in our region of international significance.
- Creative collaborations with the business community, as well as other natural history, educational, and environmental organizations.

- Entrepreneurial business plans to provide financial support for programs of research and education.

CHANGES WITHIN OUR ORGANIZATION

Virtually every department at the San Diego Natural History Museum will make profound changes in operations and programs as a result of this Strategic Plan. Major changes include:

1. Develop and build all new permanent exhibitions in the new museum over the next five years at a cost of \$20 million.
2. Double educational programs and develop new telecommunications outreach capable of reaching millions of people throughout our southern California-Baja California region.
3. Develop and implement a major collaborative peninsular biogeography and geologic research program with international participation.
4. Build and empower a dynamic leadership team and management structure that will transform this Museum into a learning organization.
5. Become a market-driven organization focused on science and education.
6. Develop and implement binational, bicultural partnerships that result in measurable change as a result of natural history research and environmental education.
7. Build a diversified, stable base of support to ensure the long-term viability of the Museum's programs and services.

SUPPORT

This Strategic Plan was made possible by a gift from the J. W. Sefton Foundation. The Plan was also supported by a gift from the David and Lucile Packard Foundation in support of the Biodiversity Research Center of the Californias through the Organization Effectiveness and Philanthropy Program. The adoption of this 2002-2012 Strategic Plan completes the 1992-2002 Full Circle Strategic Plan also funded by the J. W. Sefton Foundation.

KEY RESULT AREAS, OBJECTIVES, AND STRATEGIES

The Strategic Planning Committee identified those areas which demand the Museum's highest priority attention and action. These Key Result Areas were determined by analysis of internal strengths and weaknesses and careful consideration of outside opportunities and threats. In each Key Result Area, Objectives indicate what we are seeking to achieve and Strategies indicate how we plan to reach the objectives. Details are found in the Action Plans on file in each department of the Museum and the Museum Library, as well as the Museum's website (www.sdnhm.org).

KRA 1. PUBLIC PROGRAMS

Become the region's leading center for lifelong education about the natural world by delivering high quality exhibits and programs onsite, offsite, and online.

Rationale:

The Museum's previous 10-year plan concentrated on infrastructure: a new building, expanded staff, focused research program, and fundraising strategies. But these efforts alone don't accomplish the Museum's mission. In the next 10 years, we must build upon this foundation to enhance and expand our exhibits and educational programming.

Even these programs must be viewed as tools, a means to an end. The best designed displays and the most enjoyable classes will be considered successful only if, through

evaluation, we can tell that they advance the Museum's mission: to raise awareness, promote understanding, and inspire stewardship of our region's biodiversity.

Although these public programs appear very diverse, they are unified by their intent to foster a "sense of place." When people grasp the significance and relevance of nature in their immediate surroundings, they will begin to care for nature and protect it...then gradually expand that sense of stewardship from their neighborhood, to the community, to our binational region, and ultimately, to Earth itself.

Note: the following objectives are to be achieved by June 30, 2012.

OBJECTIVE 1.1 (Onsite Exhibitions)

Fill 28,000 sq. ft. of gallery space and the museum grounds with engaging, relevant, dynamic, and memorable exhibit experiences that are based on living and scientific collections, and which inspire visitors to action.

STRATEGIES

1.1.1 Permanent Exhibitions

Create three major permanent bilingual exhibitions and several auxiliary permanent exhibits which reinforce and complement each other, address regional natural history within a global context, and provide a deeper understanding of nature and the Museum.

1.1.2 Temporary Exhibitions

Establish and maintain a systematic process of finding, reviewing, planning, and installing an ongoing schedule (at least three years out) of temporary exhibitions, with recommendations for an annual exhibit season to be reviewed by committee.

1.1.3 Website Components for Onsite Exhibitions

Supplement the exhibit experience with online content to provide depth, expand the audience, and extend the life of the exhibition after closing.

1.1.4 Evaluation of Onsite Exhibitions

Increase understanding of our audience (current and potential) through integration of research and evaluation in all aspects of the onsite exhibitions program.

OBJECTIVE 1.2 (Offsite Exhibitions)

Create at least one traveling exhibition and four offsite exhibits to reach broader audiences and advance the Museum's mission.

STRATEGIES

1.2.1 Traveling Exhibitions

Develop and produce bilingual traveling exhibitions to tour nationally and internationally.

1.2.2 Offsite Exhibits

Create small to midsize exhibits for long-term and permanent installation at other appropriate institutions in our region.

1.2.3 Exhibits Contract Work

Pursue and obtain contracts with other institutions to consult on design, development, and production of interpretive natural history/science exhibits.

1.2.4 Website Components for Offsite Exhibitions

Support SDNHM-produced traveling exhibitions and offsite installations with website components that enhance content, drive traffic, and serve as an evaluation tool.

1.2.5 Evaluation of Offsite Exhibitions

Increase understanding of our audience (current and potential) through integration of research and evaluation in all aspects of the offsite exhibitions program.

OBJECTIVE 1.3 (Education)

Within eight years, ensure that a San Diego Natural History Museum program is part of the academic experience of every K-12 student within the San Diego County public school system.

STRATEGIES

1.3.1 Public School Programs

Establish a grade-level, county-wide mandate for an SDNHM-based natural history program.

1.3.2 Website Components

Support the museum-related academic experience of San Diego County school children with online learning.

1.3.3 Distance Learning Programs

Collaborate with San Diego County Office of Education distance-learning staff to deliver our science content and field experiences through their distribution system.

OBJECTIVE 1.4 (Education)

Increase participation in education programs onsite, offsite, and online by 10% or more per year.

STRATEGIES

1.4.1 School Programs

Develop innovative school programs to serve a broader academic audience including home schools, independent schools, charter schools, and a potential museum school, with increased participation by middle school, high school, and college students.

1.4.2 Public Programs

Identify new audiences to increase participation in education programs onsite, offsite, and online.

1.4.3 Youth Programs

Identify current and potential audience program needs and preferences through constant improvement and evaluation of programs and audiences that serve the youth and family of the community.

1.4.4 Community Outreach

Consolidate, enhance, and expand Del Museo al Barrio (DMAB) and After-school Science Adventures (ASA).

1.4.5 Binational Programs

Create infrastructure and partnerships throughout the Baja California peninsula and on states bordering the Sea of Cortés to deliver workshops, train facilitators, and introduce new environmental education materials that produce measurable results in awareness and community action.

1.4.6 Website Components

Facilitate participation in programs by improving website interface and interactivity.

1.4.7 Theater Programs

Increase visibility and educational effectiveness of the Charmaine and Maurice Kaplan Theater.

OBJECTIVE 1.5 (Volunteer Programs)

Increase the baseline of volunteer hours by 10% or more per year to enhance museum programming.

STRATEGIES

1.5.1 Exhibition Volunteers

Enhance volunteer support of exhibitions with volunteers of diverse age, skill level, and language.

1.5.2 Education Volunteers

Enhance volunteer support of education programs onsite, offsite, and online with volunteers of diverse age, skill level, and language.

1.5.3 Volunteer Recruitment

Develop new recruitment strategies to include diversification in culture, language, age, and skills, using new marketing campaigns and volunteer incentives.

1.5.4 Volunteer Retention

Develop a plan for both transitioning experienced volunteers and retaining newly recruited volunteers/interns to ensure continuity.

KRA 2. RESEARCH

Establish SDNHM as a leading research institution and forum for scientific discussion and cooperation in and about our region.

Rationale:

By documenting and interpreting the biological and geological uniqueness of our binational region, we have the opportunity to help citizens develop informed opinions about environmental issues. The basis for that awareness and informed decision-making is the scientific, collections-based research that forms the core of the Biodiversity Research Center of the Californias (BRCC).

Through collaboration with other researchers who focus on the biodiversity and biogeography of southern California and the peninsula of Baja California, we also have the opportunity to develop new strategic research programs. These will ultimately synthesize the many individual efforts into a broader view of the biological and geological evolution of our

region. Researchers who focus on specific questions benefit from the collaboration and discussion of colleagues addressing complementary questions. The museum will facilitate this synergy and become a leading research institution by providing resources and opportunities for binational collaboration, publications, and symposia.

Design and implementation of an effective bioinformatics system will support the research programs by providing easy access to the extensive store of data represented by the 7.5 million specimens in the Museum's growing collections. It will also serve to improve the quality of our efforts to manage and care for the specimens.

To establish the Museum as a leading research institution, there are significant personnel requirements that must be achieved. Without additional key positions, the threshold for a viable, strong research culture will not be achieved.

OBJECTIVE 2.1 (Research priority)

Develop and implement a collaborative, peninsular biogeography research program with international participation by 2012.

STRATEGIES

- 2.1.1 Determine research priorities and key partnerships, collaborators, and alliances.
- 2.1.2 Complete at least two regional field expeditions with international collaboration.
- 2.1.3 Publish technical literature in peer-reviewed journals.
- 2.1.4 Publish a major synthesis of research.
- 2.1.5 Identify topics with popular appeal and develop relevant products (e.g. programs, web pages, field guides).

OBJECTIVE 2.2 (Research priority)

Develop and implement a collaborative research program for the geological and paleontological history of Peninsular California with international participation by 2012.

STRATEGIES

- 2.2.1 Determine research priorities and key partnerships, collaborators, and alliances.
- 2.2.2 Complete at least two regional field expeditions with international collaboration.
- 2.2.3 Publish technical literature in peer-reviewed journals.
- 2.2.4 Publish a major synthesis of research.
- 2.2.5 Identify topics with popular appeal and develop relevant products (e.g., programs, web pages, field guides).

OBJECTIVE 2.3 (Bioinformatics system)

Create an information system to support stewardship of collections and research priorities.

STRATEGIES

- 2.3.1 Implement an upgraded system for internal management of all collection data with a phased implementation schedule.
- 2.3.2 Achieve 85% completion of data capture for active collections including paleontology, botany, marine invertebrates, and library collections.
- 2.3.3 Implement web-based data capture systems to facilitate field operations.
- 2.3.4 Implement web-based accessibility of specimen data.
- 2.3.5 Implement an integrated network of databases with key partners and affiliates.

OBJECTIVE 2.4 (Infrastructure of BRCC)

Develop the infrastructure to strengthen the research culture of the Museum.

STRATEGIES

- 2.4.1** Determine and implement an effective organizational structure to support research priorities and stewardship of collections.
- 2.4.2** Improve visibility of BRCC.
- 2.4.3** Develop and implement training and educational opportunities.
- 2.4.4** Improve quality of collection care and management.
- 2.4.5** Establish scientific graphics and publications unit.
- 2.4.6** Obtain and expand research facilities and equipment.
- 2.4.7** Secure endowment and other funds to support infrastructure.

KRA 3. MANAGEMENT

Build and empower a dynamic leadership team and management structure that will transform this Museum into a learning organization capable of fully implementing the 2012 Strategic Plan.

Rationale:

If we are to create the future with these Strategic Plans, as well as through future new opportunities, we must become a “learning organization.” That will require a management team which promotes openness, systemic thinking, creativity, self-efficacy, and empathy (McGill, Slocum, and Lei, 1992). As a result, changes in leadership structure and culture, as well as policy and procedure, are required.

The San Diego Natural History Museum is an educational institution delivering “Sense of Place” learning. Organizational learning by all employees and volunteers must also become part of our culture. All employees must come to see this organization as a system, develop their own personal mastery of it, and learn how to experiment and reframe problems collaboratively.

Technology for the gathering, use, and distribution of information must become part of the fabric of the institution. That will require on-going training and learning and widespread use by all.

The Board is the guardian of organization values and must systematically drive the Museum toward the fulfillment of our Mission and Vision. It must be forward-thinking, proactive, and diverse, and it must operate with one voice as it leverages new support for the institution. To do so will require a transformation of governance just as there must be a transformation in staff leadership and management.

OBJECTIVE 3.1 (Management Structure)

Transform the governance of the Museum to a new paradigm by 2004 to support a new “learning organization” management structure and leverage new support for the institution and its Vision.

STRATEGIES

- 3.1.1** Research and prepare plans for a new governance paradigm to be adopted by the Board of Trustees in 2004.

OBJECTIVE 3.2 (Board Involvement & Leadership)

Significantly increase board involvement and leadership in external organizations by 2004.

STRATEGIES

3.2.1 Optimize the board’s role in achieving Mission and Vision, as well as policy oversight.

OBJECTIVE 3.3 (Learning Organization)

By the year 2008, create the management structure, practices, and culture required to improve organization effectiveness by transforming the Museum into a “learning organization.”

STRATEGIES

3.3.1 Create a management team to research new organizational structures for the Museum with an emphasis on “learning organizations.”

OBJECTIVE 3.4 (Management Infrastructure Plan)

Create and begin implementation of a new Management Infrastructure Plan by 2004 which includes Finance, Communications, Technology, Security, and Green Institution Strategies.

STRATEGIES

3.4.1 Utilize the expertise of the Technology Committee to guide development of an enterprise information system (communications, processing, storage, and presentation) that supports the strategic plan’s key result areas with a single cost-effective, integrated, flexible infrastructure.

3.4.2 Utilize the expertise of the Executive, Finance, and Audit Committees of the Board to create the new Management Infrastructure Plan.

OBJECTIVE 3.5 (Personnel)

Review and update personnel policies, procedures, and practices that will result in a motivated, dynamic, and creative workforce capable of fully implementing the 2012 Strategic Plan.

STRATEGIES

3.5.1 Hire a Personnel Director to create policies and procedures with the assistance of a staff committee.

OBJECTIVE 3.6 (Strategic Plan)

3.6.1 Adopt the 2022 Strategic Plan in July 2012.

STRATEGIES

3.6.1 Begin planning for the 2022 Strategic Plan in 2010.

KRA 4. MARKETING AND IDENTITY

Ensure that the San Diego Natural History Museum becomes the best-known, most-respected, most-visited museum in San Diego County, with the largest membership, and significant, ongoing financial support.

Rationale:

To date, the Museum has been a science/education-driven institution. To survive, it needs to become a market-driven organization with its major objective being to further science and education. Because the public supports the Museum, it is essential to increase public interest and awareness. Presently there is low public knowledge and attendance of museum programs. To increase knowledge and attendance we need to know more about the public, what it wants, and the best way to communicate to diverse audiences. We have some new and good information from recent surveys, and data analysis and research conducted through the Arts/Market Cultural Initiative. With this information, we can apply the principles of marketing to all public program areas in order to strengthen the museum's "brand," which will increase attendance and community awareness of the Museum's impact and importance, and help bring about additional financial support.

OBJECTIVE 4.1 (Marketing Plan)

By July 1, 2003, make museum marketing a top-level management priority, evidenced by being as market-driven as it is science/education-driven, with a commitment to an overall annual marketing plan.

STRATEGIES

- 4.1.1 Create an overall museum marketing plan to integrate the goals and objectives of all departments.
- 4.1.2 Empower the marketing committee with the necessary resources.

OBJECTIVE 4.2 (Branding)

Double awareness of the Museum in binational region by July 1, 2006.

STRATEGIES

- 4.2.1 Build a brand identity and reputation as being a consistently relevant, engaging, and memorable experience (regardless of specific exhibitions and programs) and a source of accurate and reliable information.

OBJECTIVE 4.3 (Market Research)

Set yearly attendance goals, based on progress of permanent exhibits, traveling exhibitions, and public programs to support growth in public programs, exhibition and film visitors, membership, facility usage, store sales, and development.

STRATEGIES

- 4.3.1 Create a process to get good membership and audience data to maintain focus and direction.
- 4.3.2 Utilize data to guide decisions.
- 4.3.3 Leverage efforts of other organizations to increase visitorship to Balboa Park, San Diego, Baja California, and California.

Remarks

Museum needs an Information Technology specialist to establish, program, enter, and maintain audience marketing data as well as to train staff on how to maximize use the data across departments to support an integrated marketing plan. There are many other departments who also need the help of an information technologist.

Museum should hire a Marketing Firm with research capabilities to work with us through the marketing plan, branding, and awareness-building process in the first couple years of the 10-year program. This firm should be kept on a retainer to continue guiding the Museum and providing it with marketing research data just as Bob Smith and Bob Sharp do with the Museum's strategic-planning and development efforts.

KRA 5. RELATIONSHIP WITH MEXICO

Develop relationships with Mexican institutions that result in partnerships and build organizational effectiveness of all to better serve our binational region.

Rationale:

The San Diego Natural History Museum is poised to be a critical agent in a comprehensive regional partnership that will initiate real and measurable change. Conservation research and effective environmental education that lead to real changes in level of knowledge, attitudes, and actions benefiting the greater Baja California peninsula and the Sea of Cortés will require *new* knowledge, *new* tools, *new* partners, and a *sustained* effort. The infrastructure, represented by the Biodiversity Research Center of the Californias (BRCC), the Environmental Science Education Center (ESEC), and the new facility, has brought us to this important crossroads. Through the BRCC and ESEC programs we have established strong relationships with potential partners in research and education both here and in Baja California. Never before has such a coordinated effort been attempted nor have any such efforts had such a great chance for success. Now the questions truly are, "If not us, then who? If not now, then when?" *Now* is the time and the *Museum* is the institution that can fuel the realization of this vision.

OBJECTIVE 5.1 (Binational Advisory Board)

Within two years, strengthen and engage the Binational Advisory Board to support the binational programs of the institution.

STRATEGIES

5.1.1 Increase number, representation, and responsibilities of the Board of Trustees.

OBJECTIVE 5.2 (Affiliate Institutions)

Within five years, create a network of affiliate institutions throughout the region to better serve people of the region with programs of natural history, research, environmental education, exhibits, and conservation.

STRATEGIES

5.2.1 Offer assistance in capacity building for affiliates (research, education, exhibits, administration, fundraising).

OBJECTIVE 5.3 (Natural History Resource Center)

Increase public and professional awareness of our role as a natural history resource and be recognized as a catalyst for programs of research, environmental education, and conservation for our binational region as indicated by widespread participating in programs and availability of funding.

STRATEGIES

5.3.1 Use affiliates and technology to reach the public and professionals throughout the region.

KRA 6. ENHANCE FINANCIAL STABILITY

Build a diversified, stable base of support impervious to economic fluctuations, thus ensuring the long-term viability of the Museum's programs and services.

Rationale:

Stable, ongoing sources of revenue are critical for the Museum to fulfill its mission. Enhanced financial stability will enable the Museum to conduct more effective long-range planning and to continue its commitment to maintaining a balanced operating budget. The Museum will identify and develop new streams of revenue from non-traditional sources, thereby expanding and diversifying its base of support. Adopting this KRA will also allow community members to experience the personal satisfaction that philanthropy provides, and to fulfill their individual dreams through philanthropic actions and participation in the Museum.

OBJECTIVE 6.1 (Endowment)

Create an endowment campaign in 2002 and continue it every year thereafter with a goal of \$20 million by 2012.

STRATEGIES

- 6.1.1** Engage a planned giving professional.
- 6.1.2** Identify and recruit volunteer leadership.
- 6.1.3** Create and implement the endowment campaign.

OBJECTIVE 6.2 (Permanent Exhibits)

Raise \$20 million in permanent exhibit funding and \$3 million in building completion funding over the next five fiscal years (2003-2008).

STRATEGIES

- 6.2.1** Develop a new campaign case statement and communications plan.
- 6.2.2** Develop, initiate, and implement the campaign plan.

OBJECTIVE 6.3 (Annual Contributions)

Increase annual contributions from 2002 level, each subsequent year, plus inflation and a percentage increase to be determined through the annual budget process.

STRATEGIES

- 6.3.1** Increase contributed revenue from individuals and family foundations.
- 6.3.2** Increase corporate membership program and underwriting support.
- 6.3.3** Increase foundation and grant revenue.

- 6.3.4 Increase government support (city, county, state, federal).
- 6.3.5 Maximize special event revenue (Dos Aguilas, Fall Gala, etc.).
- 6.3.6 Increase the Museum's membership and associated revenue.
- 6.3.7 Increase net revenue from direct mail campaigns.

OBJECTIVE 6.4 (Earned Income)

Enhance and increase earned revenue from 2002 level, each subsequent year, plus inflation and a percentage increase to be determined through the annual business development plan.

STRATEGIES

- 6.4.1 Increase and maximize revenue from education programs.
- 6.4.2 Increase admissions revenue.
- 6.4.3 Increase and maximize facility usage revenue.
- 6.4.4 Increase store revenue.
- 6.4.5 Increase revenue from research contracts.

OBJECTIVE 6.5 (Business Development)

Identify and develop sources for non-traditional contributed and earned revenue.

STRATEGIES

- 6.5.1 Develop and market exclusive SDNHM retail products.
- 6.5.2 Develop Museum Services Business Development Program.

STRATEGIC PLANNING PARTICIPANTS

Strategic Planning Consultants

Robert F. Smith	Designer and Facilitator President, Strategies & Teams, Inc.
Mary S. Smith	Logistics Coordinator Vice President, Strategies & Teams, Inc.
Cynthia Carson	Co-Facilitator Strategic Planning/Management Counsel
Sheila McCully	Recorder Pt. Loma's Girl Friday

Strategic Planning Co-Chairs

Charlotte Chandler	President, Board of Trustees San Diego Natural History Museum
Michael W. Hager, Ph.D.	Executive Director San Diego Natural History Museum

Strategic Planning Team

Richard Benard	Chief Operating Officer San Diego Natural History Museum
Darcy C. Bingham	Board of Governors San Diego Foundation
Pamela M. Bruder	Trustee Emeritus San Diego Natural History Museum
Richard Bundy	Architect Architects Richard Bundy & David Thompson
Paisley Cato, Ph.D.	Collections Curator San Diego Natural History Museum
Charlotte Chandler	President, Board of Trustees San Diego Natural History Museum
Dale Clark	Director of Website Development San Diego Natural History Museum
Thomas Deméré, Ph.D.	Curator, Paleontology Department San Diego Natural History Museum
Denise Moreno Ducheny	Attorney at Law Law Offices of Denise Moreno Ducheny
Iris Engstrand, Ph.D.	Professor of History University of San Diego
Anne S. Fege, Ph.D.	Forest Supervisor Cleveland National Forest
Steve Gautereaux	Vice President of Network Management Cox Communications
Michael W. Hager, Ph.D.	Executive Director San Diego Natural History Museum
Enrique Hambleton	Vice President Pronatura, Peninsula of Baja California

Ann Laddon	Deputy Director of Institutional Development San Diego Natural History Museum
Steven P. McDonald	Partner Luce, Forward, Hamilton & Scripps
Jerry Navarra	President Jerome's Furniture
Thomas A. Page	Chairman of the Board (Ret.), Director Emeritus Enova Corporation
Richard J. Roncaglia	Managing Director Private Client Group, USBank
Robert Sharp	President Robert B. Sharp Company
Ruth G. Shelly	Deputy Director of Public Programs San Diego Natural History Museum
Bill Trumpfheller	President Nuffer, Smith, Tucker
Ann White	Co-Founder Phil & Ann White Fund
Delle Willett	Director of Marketing San Diego Natural History Museum

Board of Trustees 2001-2002

Peter Baram, Ph.D.	Consultant
Miles L. Bowler	Project Administrator
Sarah L. Brightwood	Landscape Designer, Conservationist, Environmental Planner, Philanthropist
Pamela M. Bruder	Trustee Emeritus Geologist/Paleontologist
Pamela I. Buie	Real Estate Broker Buie Communities, Inc.
Rudy M. Castruita, Ed.D.	San Diego County Superintendent of Schools County Office of Education
Charlotte Chandler	Community Volunteer
Mary H. Clark	Trustee Emeritus
Walter J. Davis, Jr.	Vice Admiral USN (Retired) Entrepreneur, Co-Founder E-Fire, Inc.
Denise Moreno Ducheny	Attorney at Law Law Offices of Denise Moreno Ducheny
Paul Ecke	Retired Chairman, Paul Ecke Ranch
Steve Gautereaux	Vice President of Network Management Cox Communications
Michael D. Gelfand	President, Terra Vista Management
Enrique R. Hambleton	Businessman, Photographer, Writer, Conservationist Vice President of Pronatura, Peninsula of Baja California
Charmaine Kaplan	Honorary Trustee
Maurice Kaplan	Honorary Trustee
Charles F. Kennel, Ph.D.	Director & Vice Chancellor of Marine Sciences Scripps Institution of Oceanography
Jeffrey Kent	President, Kent's Bromeliad Nursery, Inc.
Philip M. Klauber	Honorary Trustee
Patti Krebs	Executive Director, Industrial Environmental Association
Enrique Landa	Architect/Developer

James E. Lauth	Founding Partner Beamer, Lauth & Steinley
Steven P. McDonald	Partner Luce, Forward, Hamilton & Scripps
Eleanor Navarra	Community Volunteer
Joan H. Parker	Community Volunteer
Norman C. Roberts, DVM	Trustee Emeritus Investment Counselor/Conservationist
Richard J. Roncaglia	Managing Director, Private Client Group USBank
Donna K. Sefton	Honorary Trustee
Thomas W. Sefton	Trustee Emeritus
Virginia B. Shaw	Director, The Learning Center Qualcomm, Incorporated
Chris Skillern	Managing Director, California Bank & Trust
Thomas C. Swanson	Marketing Consultant
Jose de la Torre-Bueno, Ph.D.	Senior Applications Engineer ChromaVision Medical Systems, Inc.
Vera A. Tucker	Massage Therapist
James T. Waring	Of Council to Ross, Dixon & Bell Principal in F I Financial LLC
Ann White	Community Volunteer
Jeffery D. Yates	Senior Vice President, JPMorgan
Ellen Zinn	Businesswoman, Community Volunteer

Task Force Participants

KRA 1. Public Programs

Charlotte Chandler, Co-Chair	President, Board of Trustees San Diego Natural History Museum
Ruth G. Shelly, Co-Chair	Deputy Director of Public Programs, SDNHM
Sarah Brightwood	Museum Trustee, Landscape Designer, Conservationist, Environmental Planner, Philanthropist
Richard Bundy	Architect
Rudy M. Castruita, Ed.D.	Museum Trustee, San Diego County Superintendent of Schools
Paisley Cato, Ph.D.	Curator of Collections, SDNHM
Dale H. Clark	Director of Website Development, SDNHM
Judy Conner	Administrator, Francis Parker School
Denise Moreno Ducheny	Museum Trustee, Attorney at Law
Michael W. Hager, Ph.D.	Executive Director, SDNHM
Ann Lemke	Docent
MaryLynn Mack	Director of Volunteer Services, SDNHM
Beatriz Margain	Cultural Attache, Consulate General of Mexico
Tim Murray	Director of Exhibits, SDNHM
Eleanor Navarra	Museum Trustee, Docent
Nancy Owens-Renner	Exhibit Developer, SDNHM
Dee Parks	Public Programs Manager, SDNHM
Carol Radford	School Programs Manager, SDNHM
Judy Ramirez	Community Outreach Manager, SDNHM
Melissa Scott	Youth Programs Manager, SDNHM
Annette Seppanen	Licensed Acupuncturist, Museum Canyoneer

William A. Simpson	Director, Staff Development Services, Research & Development, San Diego County Office of Education
George Stratman	Director of Outdoor Education, San Diego County Office of Education
Thomas C. Swanson	Museum Trustee, Marketing Consultant
Debbie Walden	Website Manager, SDNHM
Susan Weber	San Diego State University
Doretta Winkelman	Director of Binational Education, SDNHM
Nic Wiseman	President, NBWSTRATEGY

KRA 2. Research

Saul Alvarez-Borrego, Ph.D.	CICESE
Peter Baram, Ph.D.	Museum Trustee, Consultant
Patricia Beller	Marine Invertebrates Collections Manager, SDNHM
	Scientific Liaison Officer
Analissa Berta, Ph.D.	San Diego State University
Dan Brimm, Ph.D.	Community Conservation Leader
Pamela M. Bruder	Trustee Emeritus, SDNHM
Ted Case, Ph.D.	UCSD
James Clements, Ph.D.	Former Museum Trustee, Chairman & Publisher of Ibis Publishing Co, Ornithologist
	Curator of Paleontology, SDNHM
Thomas Deméré, Ph.D.	Director of BRCC
Exequiel Ezcurra, Ph.D.	San Diego State University
Janet Franklin, Ph.D.	Community Conservation Leader
Ivan Gayler	Executive Director, SDNHM
Michael W. Hager, Ph.D.	Museum Trustee, Conservationist
Enrique Hambleton	Scripps Institution of Oceanography
Philip Hastings, Ph.D.	Museum Trustee, Director & Vice Chancellor of Marine Sciences, Scripps Institution of Oceanography
Charles Kennel, Ph.D.	Museum Trustee, President of Kent's Bromeliad Nursery
	Deputy Director of Institutional Development
Jeffrey Kent	CICESE, Pronatura
Ann Laddon	Museum Trustee, Partner in Luce, Forward, Hamilton & Scripps Law Firm
Ruben Lara-Lara, Ph.D.	CICESE
Steven McDonald	Community Conservation Leader
	Scripps Institution of Oceanography
Erick Mellink, Ph.D.	Managing Director, California Bank & Trust
Charlie Robins	Museum Trustee, Vice President of Research & Development at ChromaVision Medical Systems
Enric Sala, Ph.D.	Museum Trustee, Of Council: Ross, Dixon & Bell, Principal in F I Financial LLC
Chris Skillern	San Diego State University
Jose de la Torre-Bueno, Ph.D.	
James Waring	Chief Operating Officer, SDNHM
	Trustee Emeritus, SDNHM
Richard Wright, Ph.D.	Board of Governors, San Diego Foundation
	Vice President of Network Management, Cox Communications

KRA 3. Management

Richard Benard, Co-Chair	Chief Operating Officer, SDNHM
Pamela M. Bruder, Co-Chair	Trustee Emeritus, SDNHM
Darcy Bingham	Board of Governors, San Diego Foundation
Steve Gautereaux	Vice President of Network Management, Cox Communications

Michael W. Hager, Ph.D.	Executive Director, SDNHM
Richard J. Roncaglia	Museum Trustee, Managing Director of Private Client Group, US Bank
David Winkelman	Consultant, Marketing Specialist

KRA 4. Marketing and Identity

Delle Willett, Co-Chair	Marketing Director, SDNHM
Thomas Swanson, Co-Chair	Museum Trustee, Marketing Consultant
Mark Berlin	Manager of Visitor Services, SDNHM
Erik Bolton	Art Director, SDNHM
Ann Burke	Director of Advertising, The Southern Cross Newspaper
Wendy Eng-Rytell	Education Marketing Manager, SDNHM
Lolo Enstad	Marketing Coordinator, SDNHM
Shar Huston	Art Director, SDNHM
Kindal Marin	Partner, Boesky/Marin Public Relations
Jerome Navarra	President, Jerome's Furniture
Pat Rogondino	President, Pearl River Packaging
Bill Trumpfheller	President, Nuffer, Smith, Tucker
David Winkelman	Consultant, Marketing Specialist

KRA 5. Relationship with Mexico

Michael W. Hager, Ph.D., Co-Chair	Executive Director, SDNHM
Iris Engstrand, Ph.D., Co-Chair	Professor of History, University of San Diego
Patricia Beller	Marine Invertebrates Collections Manager, SDNHM Scientific Liaison Officer
Denise Moreno Ducheny	Museum Trustee, Attorney at Law
Enrique Hambleton	Museum Trustee, Vice President of Pronatura, Peninsula of Baja California
Enrique Landa	Museum Trustee, Architect/Developer
Steven P. McDonald	Museum Trustee, Partner at Luce, Forward, Hamilton & Scripps Law Firm
Jon Rebman, Ph.D.	Associate Curator of Botany, SDNHM
Norman Roberts, DVM	Museum Trustee Emeritus, Investment Counselor/Conservationist
Doretta Winkelman	Director of Binational Education, SDNHM

KRA 6. Enhance Financial Stability

Steven P. McDonald, Co-Chair	Museum Trustee, Partner at Luce, Forward, Hamilton & Scripps Law Firm
James T. Waring, Co-Chair	Museum Trustee, Of Council: Ross, Dixon & Bell, Principal in F I Financial LLC, Board Member River Project Conservation Organization, President of the Board of Francis Parker School
Ann Laddon, Task Force Leader	Deputy Director of Institutional Development, SDNHM
Mark Berlin	Manager of Visitor Services, SDNHM
Elizabeth Castillo	Director of Corporate and Foundation Relations, SDNHM
Paul Ecke	Museum Trustee, Retired Chairman of Paul Ecke Ranch
James Haddan	Director of Membership, SDNHM
Anna Hoffmann	Senior Development Officer, SDNHM
Susan Kovalcheck	Membership Associate, SDNHM

Vatei Ouy
Dee Parks
Ronnie Schneider
Robert B. Sharp
Nancy Stevens
Delle Willett
George Wise

Director of Special Projects, SDNHM
Public Programs Manager, SDNHM
Director of Special Events, SDNHM
Professional Fundraising Consultant
Manager of Retail Operations, SDNHM
Director of Marketing and Public Relations, SDNHM
Retired Businessman, Community Volunteer

La Paz Workshop Attendees

Saúl Álvarez Borrego, Ph.D.
Gabriela Anaya Reyna

Maria de los Angeles Carvajal
Patricia Beller
Richard Benard
Benito Bermúdez Almada
Alberto Búrquez Montijo, Ph.D.
Antonio Cantú Díaz Barriga
Charlotte Chandler
Miguel A. Cisneros Mata, Ph.D.
Tom Deméré, Ph.D.
Exequiel Ezcurra, Ph.D.
Michael W. Hager, Ph.D.
Enrique R. Hambleton
Hans Herrmann
Brad Hollingsworth, Ph.D.
Luis Kasuga
José Luis León de la Luz, Ph.D.
Susana M. Mahieux
Carlos Martínez del Río, Ph.D.
María Elena Martínez Delgado
Steven P. McDonald
Tim Means
Eric Mellink, Ph.D.
Jon Rebman, Ph.D.
Norman Roberts, DVM
Alejandro Robles
Ricardo Rodríguez Estrella, Ph.D.
Phil Unitt
Facilitator: Robert Smith

CICESE
Área de Protección de Flora y Fauna Islas del Golfo de California
Gulf of California Bioregion
San Diego Natural History Museum
San Diego Natural History Museum
PN Bahía de Loreto
Instituto de Ecología, UNAM
Conservación del Territorio Insular Mexicano, A.C.
San Diego Natural History Museum
Instituto Nacional de la Pesca, SAGARPA
San Diego Natural History Museum
Instituto Nacional de Ecología
San Diego Natural History Museum
Pronatura, Península of Baja California, Niparaja, A.C.
Comisión para la Cooperación Ambiental
San Diego Natural History Museum
Acuario de las Californias
Centro de Investigaciones Biológicas del Noroeste, S.C.
Niparaja, A.C.
University of Wyoming
Conservación del Territorio Insular Mexicano, A.C.
Luce, Forward, Hamilton & Scripps
Baja Expeditions
CICESE
San Diego Natural History Museum
Investment Counselor/Conservationist
Conservation International
Centro de Investigaciones Biológicas del Noroeste, S.C.
San Diego Natural History Museum
Strategies & Teams

Fiscal Year 2001-2002 Employees

Agho, Julius	Flanagan, Pat	McCauley, Heather
Aguilar, Myra	Fitzgerald, Joe	McClure, Trina
Aguilar, Ricardo (Jose)	Foss, Douglas	McGowan, Toosdhi
Agietti, Sara	Fountain, James	McLaughlin, Vicki
Ajax, Santino	Gambling, Kimberly	Melia, Andrew
Anderson, Melissa	Garcia, Erika	Melli, Jim
Aubert, Ben	Garcia, Renee	Mellott, Margaux
Baker, Brady	Gay, Neysa	Milliken, Bridget
Baldwin, Tesha	Gehm, Rusty	Morgan, Ron
Beck, Maryann T.	Gibson, Judy	Murray, Tim
Beller, M. Patricia	Gibson, Veronica	O'Brien, Lia
Benard, Richard	Gillette, Lynett	O'Neill, Merle
Berlin, Mark	Gutzler, Robert	Ordonez, Javier
Berryhill, Abegail	Hadden, James	Orozco, Jorge
Black, Adeline	Hager, Michael	Ouy, Vatei
Boltner, Nikki	Hall, Amber	Owens-Renner, Nancy
Bolton, Erik	Henein, Magda	Paegel, Liz
Boze, Bob	Hernandez, Ignacio	Parks, Dee
Brewin, Paul	Herrera, Almandina	Parks Jr., Robert
Caballero, Jaclyn	Herrera, Henry	Peinetti, Zozima
Castillo, Elizabeth	Herrington, Chad	Petruzzelli, Tana
Cato, Paisley	Herzog, Niko	Pfanner, John
Cerutti, Richard	Hocking, Julie	Pinheiro, Atini
Chattin, Elizabeth	Hoffman, Anna	Prochaska, Gena
Chenier, Janet	Hollingsworth, Brad	Radford, Carol
Christensen, Chris	Huston, Shar	Ramirez, Judy
Clark, R. (Fritz)	Hystead, Marcus	Randall, Kesler
Coleman, Billy	Ibarra, Geraldo	Rebman, Jon
Conniry, Shauna	Jackson, Evelyn	Rebollo, Junior
Cooper, Lisa	Joines, Steven	Rich, Karen
Costelow, Jennifer	Kerr, Mindy	Riney, Brad
Criscuola, Joe	Kester, Travis	Rivera, Jorge
Crow, Melissa	Klos, J. Matt	Roeder, Mark
Cunningham, Patt	Kolins, Jeremy	Rothrock, Jennifer
Deleon, Omar	Koppel, Ali	Rouse, Mary
Delorme, Danielle	Kovalcheck, Susan	Rugh, Scott
Demere, Tom	Kresl, Doug	Rusco, Linda
Dennis, Wendy	Laddon, Ann	Ryan, Todd
Dew, Theodore	Landers, Ryan	Salazar, Vailala
Dickson, Trisha	Lauzon, Teri	Sanborn, John
Dykens, Margi	Leitch, Melissa	Schneider, Brandon
Edmonds, Robin	Lenoir, Angela	Schneider, Ronnie
Elsheikh, Diane	Leonard, Betsy	Scott, Melissa
Eng-Rytell, Wendy	Lund, Heather	Segelman, Len
Enstad, Ann	Macaraeg, Glenda	Sena, Pat
Epstein, Cynthia	Mack, MaryLynn	Shelly, Kevin
Fay, Lynell	Malasarte, Bernadette	Shelly, Ruth
Felactu, Stephan	Manion, Christian	Shimada, Aileen
Field, Michael	Martin, Darlene	Shuffelt, Sharon

SkadahI, Kai
Slocomb, Christine
Smith, Colin
Soriano, Judy
Standridge, Kirk
Stattin, Delle Willet-
Stattin Derek
Stevens, Nancy
Strommer, Michelle

Swanson, Donald
Thy, Saloun
Tysall, Anna
Unitt, Philip
Verhoek, Margo
Villarba, Randy
Vinnard, Adrienne
Virissimo, Gabe
Von Doom, Victor

Wagner, Hugh
Wall, Elizabeth
Walsh, Stephan
Webber, Gerald
Whitaker, Danielle
Whiteside, Kimberly
Winkelman, Doretta
Woolery, Patty

Appendix A

As prepared by Robert F. Smith, President
STRATEGIES & TEAMS, INC.
San Diego, California
Cynthia Carson, Co-Facilitator
July 31, 2001

DESIGN FOR SAN DIEGO NATURAL HISTORY MUSEUM **STRATEGIC PLANNING**

The new century provides extraordinary opportunities for the San Diego Natural History Museum: The grand opening of the new facility and all that portends... complete implementation of all six bold Key Result Areas set forth in the Museum's 1992-2000 *Full Circle* strategic plan...and the challenge of a new ten-year planning process to inspire our efforts for 2002-2012.

Timing

At the beginning of the new round of strategic planning there was need for immediate planning and implementation for our *transition into the new facility*. Staff and other participants in this activity stayed focused on planning for permanent and temporary traveling exhibits, operations and staffing. Highlights of this have been planning for exhibits of dinosaurs, bears, and unprecedented discoveries about the natural history of diseases... and the grand opening of the new wing with the premier of the Museum's new IMAX film.

From January, 2001, through June, 2001, the focus has shifted to recruiting community leadership and preparing for a *strategic planning process* that will determine priorities and strategies for the Museum's next decade.

Strategic planning will extend from July 1, 2001 to July 1, 2002, when the new 10-year strategic plan will be presented to the Board of Trustees for adoption.

Makeup of the Transition Planning Team (TPT)

Led by the executive director, the TPT was formed around the Museum management team. Other staff members participated in task forces related to specific aspects of the transition to the new facility. Trustees and outside experts were invited to take part at various stages in the process.

Makeup of the Strategic Planning Team (SPT) for July 1, 2001 to July 1, 2002

The size of the SPT will be 21. Experience tells us that this number works well. It brings diverse expertise and is manageable. Seven will be from the board of trustees, seven from senior Museum staff and seven from leaders of educational, business, science, and other professional activities in our region.

From time to time other Museum staff members will be invited to attend SPT sessions as observers.

SPT co-chairs will be the president of the Museum board of trustees and the Museum executive director, who also manages the overall process.

Supporting the SPT's work will be Museum staff, professional strategic planning facilitators, a planning research firm, visiting museum experts, technology consultants and financial and legal advisors as needed.

In addition, a carefully selected group of San Diego and Mexico leaders will be invited to serve as Community Advisors, providing feedback and suggestions at critical points in the process.

Design of the Process

The strategic planning process will draw upon the experience of trustees, staff and volunteers who participated in the strategic planning programs for (1) the comprehensive 1991-92 *Full Circle*, (2) the 1997-98 Environmental Sciences Education Center, (3) the 1999 Biodiversity Center of the Californias, and (4) planning for transition to new facilities....augmented by the valuable knowledge and talents of individuals new to the Museum's planning processes.

At the heart of things will be the ***Plan for Planning*** shown below. The foundation for this four-part process will be an updating of our planning database upon which our decisions about priorities, objectives, strategies and action plans can later be based. Experience has proven that this process will create future opportunities as yet not imagined.

SAN DIEGO NATURAL HISTORY MUSEUM ***PLAN FOR PLANNING***

Parts I, II and III which follow develop the *planning database*. Part IV sets out *priorities and actions*.

I. Where we are and how we got here

1. Recap of the results of 1992-2000 *Full Circle* strategic plan.
2. Revisit our *Mission*:
 - Comprehensive statement of the purpose(s) and nature of the San Diego Natural History Museum.
 - What do we do for whom, where, how?
3. Our present *positioning and niches*.
4. Our *key values and culture*. Values are the principles we have held most dear. They are the shared beliefs which energize action in a consistent manner. Culture is about our personality and style, how we do things.
5. Our present *organization structure* (board, committees, volunteers and staff).

6. *Backcasting* along critical dimensions of the Museum's programs and operations. This is history. It should be statistical and narrative. It includes major activities. It should pay attention to trends. It draws upon the recap in Step 1 above and the results of the transition into the new facilities.
7. *Critical Factors for Success* in fulfilling our Mission (e.g. having a strong and committed board; use of advanced technologies; reliability of funding; talented professional staff).
8. Our *main internal strengths* and *weaknesses*.

II. **Our primary constituencies (can be thought of as diverse target audiences)**

1. Who they are.
2. Statistical measures about them.
3. The perceptions and expectations they hold of the Museum.
4. Forecast for their growth or decline.
5. Key factors influencing their growth or decline.

III. **Assumptions about the external environment**

1. Forecast the future along relevant dimensions. Make *critical assumptions* about forces in the external environment that will likely have the most significant impacts on the Museum over the next decade.
2. Perform competitive analyses.

Identify who our principal competitors will be over the next ten years. Describe them. Consider their missions... sizes and services... organization... positionings and niches... development and marketing strategies... technology status... financial condition... management and staff abilities and depth... other strengths and vulnerabilities.

Identify our present principal *competitive advantages* and *disadvantages*.

3. Identify our *main external opportunities* and *threats* based on the above information and analyses.
4. Identify *potential partners* for leveraging our resources.

IV. **Where we want to go and how we're going to get there together**

1. *Core challenges* faced by the Museum in 2002-2012.
2. **Create our *Vision* for the future. Assuming we fulfill our Mission, what would be our ideal positioning and niches in 2012?**

3. **Determine our principal priorities for action, for change. Where we most need to do things that are new, better and different... called *Key Result Areas (KRA)*... where we most need to make things happen.**
4. Determine specific, measurable, time-certain *objectives* in each **KRA**.
5. Determine *strategies* for achieving the objectives.
6. **Prepare *Action Plans* (including resource requirements and cost/benefit analyses) for implementing the strategies.**
7. Likely responses to our strategies (internally and externally). How can we influence responses to be what we would like them to be?
8. Determine the impact of this plan on *how we are organized*. Changes needed? When?
9. Make provisions for effective interaction between this strategic plan and the strategic plans and annual operating plans of the Museum's divisions and departments.
10. Develop a *Plan for Communicating the Plan*.
11. Provide for progressive review of Action Plan implementation and results... and for monitoring changes in the external environment.

Task Forces of Museum staff will be created to perform much of the research required for Parts I, II and III of the **Plan for Planning**. An outside firm will design and carry out survey and focus group research needed for developing the planning database. Later other task forces will carry out preparatory work for the **Key Result Areas (KRAs)** as the latter are determined by the SPT. While SPT members will be included in some task forces, the research homework will be assigned to the Museum staff most connected to the individual **KRAs**.

External Authorities from the museum, technology, exhibition, science and education worlds will be invited to be resource persons at various SPT and task force meetings.

Visits by SPT members to other museums with reputations for the most advanced exhibiting, education programs, technologies, and financial development will be scheduled during the course of the planning sessions.

As an important part of our database research, one focus group will be held in Tijuana, Mexico, with key cultural and business leaders participating.

Further, a special relationship-building workshop will be held in Baja California to encourage collaborative efforts of strategically positioned science, government, education and business leaders of Mexico in our planning process.

Facilitators Robert F. Smith and Cynthia Carson, both experienced in the Museum's current and earlier planning, will assist in process design, preparations and coordination; facilitate the SPT sessions; work with task forces; and counsel the early implementation stages.

Scheduling Planning Sessions

Starting in July, 2001 a series of six one-day sessions will be scheduled. One or more of these days may be split into two half-days. The wrap-up session will take place in the fourth quarter of the 2001-2002 fiscal year. The first year of implementation will be 2002-2003.

Sessions will be held in the fully equipped, conferee-friendly boardroom of the Museum's new wing.

Appendix B

As prepared by Robert F. Smith, President
STRATEGIES & TEAMS, INC.
San Diego, California
Cynthia Carson, Co-Facilitator

San Diego Natural History Museum
November 20, 2001
Page 1

**2001-2002 Calendar for the Museum's
Strategic Planning Process (Revised)**

Dates	<i>Plan for Planning Steps</i>
July 31, 2001	I. Where we are now and how we got here 1. Recap of the results of the 1992-2002 <i>Full Circle</i> Strategic plan 2. Revisit our present <i>Mission, Purpose</i> and <i>Vision</i> 3. Revisit our present <i>positioning</i> and <i>niches</i> 4. Our key <i>values</i> and <i>culture</i> 5. Our organization structure (board, committees, volunteers, staff)
September 25, 2001	6. <i>Backcast</i> 7. <i>Critical Factors for Success</i> 8. Our <i>main internal strengths</i> and <i>weaknesses</i> II. Our primary constituencies
November 20, 2001	III. Assumptions about the external environment 1. <i>Main external opportunities</i> and <i>threats</i> (More)

Dates	<i>Plan for Planning Steps</i>
November 20, 2001 (con't)	<p>IV. Where we want to go and how we're going to get there together</p> <ol style="list-style-type: none"> 1. <i>Core challenges</i> in 2002-2012 2. Forming a <i>Vision for Future</i>
January 15, 2002	<ol style="list-style-type: none"> 3. Revisit our <i>Mission</i> and <i>Vision</i> for the future 4. Our <i>Key Result Areas (KRA)</i> 5. <i>Objectives</i> in the KRAs 6. <i>Strategies</i> for achieving the objectives 7. KRA task forces for <i>Action Planning</i>
April 23, 2002	<p>Presentation of <i>Action Plans</i> with <i>Resource Requirements</i> and <i>Cost/Benefit Analyses</i></p>
June 11, 2002	<p>Final review of <i>Action Plans</i></p> <p>Steps IV-7 through IV-11 of <i>Plan for Planning</i></p> <p>Preparation for presentation of <i>2012 Strategic Plan</i> to the Board of Directors</p>

“To think beyond your experience and plan beyond your tenure is the moral obligation of boards and staff.

“To do this, organizations must learn how to create the future – not just predict it.”

Allen Liff

June 1996

The 2002-2012 Strategic Plan is entirely programmatic and builds on the infrastructure created by the 1992-2002 Strategic Plan.

“Never doubt that a small group of thoughtful, committed citizens can change the world; indeed, it’s the only thing that ever has.”

Margaret Mead

This report is the last step in completion of the 1992-2002 Strategic Plan. That plan put in place the organization and facilities required before a major expansion of programs was possible.