

## **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**

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**

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**

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**

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**

Identify and develop sources for non-traditional contributed and earned revenue (see appendix for potential products/activities)

**STRATEGIES**

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

# San Diego Natural History Museum

## ACTION PLAN

**Key Result Area 6:** Enhance Financial Stability

**Planning Leader:** Ann Laddon

**Objective 6.1:** Create an endowment campaign in 2002 and continue it every year thereafter with a goal of \$20 million by 2012.

**Dates of Action Plan:** 2002-2012

**Strategy 6.1.1:** Engage a planned giving professional

**Presented:**

**Approved:**

| Action Steps<br>(Numbered)                                       | Who<br>Responsible<br>(*Lead<br>person) | Starting<br>Date | Scheduled<br>Completion<br>Date | Actual<br>Completion<br>Date | REMARKS (e.g., opportunities or<br>problems uncovered; talents or<br>weaknesses revealed; coordinated<br>efforts required) |
|--|---|------------------|---------------------------------|------------------------------|--|
| 6.1.1.1. Create job description and<br>scope of service          | DDID                                    | June 2002        | July 2002                       |                              |  |
| 6.1.1.2. Determine budget and its<br>assignment                  | DDID/ED                                 | June 2002        | July 2002                       |                              | This will be determined with input from<br>Hager, Benard, and Sharp during budget<br>and campaign planning                 |
| 6.1.1.3. Evaluate strategic plan for<br>priority endowment needs | DDID                                    | Sept. 2002       | Oct. 2002                       |                              | This will be a joint effort of the DD's, as<br>well as the executive director  |
| 6.1.1.4. Identify and recruit planned<br>giving consultant (PGC) | DDID                                    | Sept. 2002       | Oct. 2002                       |                              |  |

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\*PGC Planned Giving Consultant

DDID: Deputy Director of Institutional Development

EE: Executive Director

# San Diego Natural History Museum

## ACTION PLAN

**Key Result Area 6:** Enhance Financial Stability

**Planning Leader:** Ann Laddon

**Objective 6.1:** Create an endowment campaign in 2002 and continue it every year thereafter with a goal of \$20 million by 2012.

**Dates of Action Plan:** 2002-2012

**Strategy 6.1.2:** Identify and recruit volunteer leadership

**Presented:**

**Approved:**

| Action Steps (Numbered)  | Who Responsible (*Lead person) | Starting Date | Scheduled Completion Date | Actual Completion Date | REMARKS (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)               |
|--|--------------------------------|---------------|---------------------------|------------------------|---|
| 6.1.2.1. Planned Giving Consultant (PGC)* reviews list of current Live Oaks Society (LOS) members and former planned giving committee to identify volunteer leadership prospects | PGC                            | Sept. 2002    | Sept. 2002                |                        |   |
| 6.1.2.2. PGC creates volunteer leadership recruitment plan, including committee roles and responsibilities, goals and objectives   | PGC                            | Sept. 2002    | Sept. 2002                |                        | Work with DD of ID to strategically identify, cultivate, and recruit, including a stewardship component for current LOS members |
| 6.1.2.3. PGC implements volunteer leadership recruitment plan and secures chair and commitments to serve   | PGC                            | Oct. 2002     | Dec. 2002                 |                        |   |
| 6.1.2.4. PGC initiates monthly meetings of volunteer leadership  | PGC                            | Jan. 2003     | Ongoing monthly           |                        |   |

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|  |                  |            |                            |  |  |
| 6.1.2.5. Determine next chair for endowment committee                              | PGC/DDID         | June 2003  | Annual review through 2012 |  |  |
| 6.1.2.6. Identify additional members of the committee and recruit                  | PGC              | Aug. 2003  | Annual review through 2012 |  | A prospect list will be created and maintained as part of the ongoing committee's roles and responsibilities. This will work in conjunction with board resources |
| 6.1.2.7. Evaluate need / value of securing a full-time planned giving professional | PGC/DD/Exe. Dir. | April 2004 |                            |  | This will be determined based on level of performance and success of a part-time consultant.   |

\* PGC: Planned Giving Consultant  
DD of ID: Deputy Director of Institutional Development  
LOS: Live Oaks Society, SDNHM's deferred gift club

# San Diego Natural History Museum

## ACTION PLAN

**Key Result Area 6:** Enhance Financial Stability

**Planning Leader:** Ann Laddon

**Objective 6.1:** Create an endowment campaign in 2002 and continue it every year thereafter with a goal of \$20 million by 2012.

**Dates of Action Plan:** 2002-2012

**Strategy 6.1.3:** Create and implement the endowment campaign

**Presented:**

**Approved:**

| Action Steps<br>(Numbered)   | Who<br>Responsible<br>(*Lead<br>person) | Starting<br>Date | Scheduled<br>Completion<br>Date | Actual<br>Completion<br>Date | REMARKS (e.g., opportunities or<br>problems uncovered; talents or<br>weaknesses revealed; coordinated<br>efforts required) |
|--|---|------------------|---------------------------------|------------------------------|--|
| 6.1.3.1. Review adopted strategic plan and determine target list of areas of need and opportunity  | PGC                                     | Sept. 2002       | Oct. 2002                       |                              | This will involve executive director, deputy directors, and campaign consultant  |
| 6.1.3.2. PGC to create a marketing and implementation plan and goals for FY 02/03 Live Oaks Society, growing over next three years to FY 05/06(deferred gift club) | PGC/DM                                  | Nov. 2002        | Jan. 2003                       |                              |  |
| 6.1.3.3. PGC implements plan for deferred gift endowment campaign  | PGC                                     | Jan. 2003        | Ongoing                         |                              | This will involve collaboration with the volunteer coordinator   |
| 6.1.3.4. PGC develops prospect list for current endowment gifts  | PGC                                     | Jan. 2003        | Quarterly review with ID dept.  |                              | In conjunction with ID dept. and DD of ID  |

|   |        |            |               |  |  |
|---|--------|------------|---------------|--|--|
| 6.1.3.5. PGC begins cultivation and solicitation for targeted current gifts to endowment                        | PGC    | Ongoing    | Annual review |  | This will involve executive director, as well as the DD in the area of interest, and identified annual budget priorities |
| 6.1.3.6. Plan for high visibility endowment campaign for kick-off following completion of the Exhibits Campaign | PGC    | Jan. 2006  | June 2006     |  | Utilize outside professional campaign consultant to engage in endowment campaign planning study                          |
| 6.1.3.7. Create endowment campaign collateral materials   | PGC    | June 2006  | Sept. 2006    |  |  |
| 6.1.3.8. Identify, recruit, and train Endowment campaign leadership   | PGD/ED | Sept. 2006 | Nov. 2006     |  |  |
| 6.1.3.9. Initiate Three-year Endowment Campaign   | PGC    | Jan. 2007  | Jan. 2010     |  |  |

- PGC: Planned Giving Consultant
- DM: Director of Marketing

# San Diego Natural History Museum

## ACTION PLAN

**Key Result Area 6:** Enhance Financial Stability

**Planning Leader:** Ann Laddon

**Objective 6.2:** Raise \$20 million in permanent exhibit funding and \$3 million in building completion funding over the next five fiscal years (2003-2008)

**Dates of Action Plan:** 2002-2012

**Strategy 6.2.1:** Develop a new campaign case statement and communications plan

**Presented:**

**Approved:**

| Action Steps (Numbered)  | Who Responsible (*Lead person) | Starting Date | Scheduled Completion Date | Actual Completion Date | REMARKS (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required) |
|--|--------------------------------|---------------|---------------------------|------------------------|---|
| 6.2.1.1. Secure consultant to develop comprehensive communications plan and collateral materials                         | DDID                           | April 2002    | May 2002                  |                        |   |
| 6.2.1.2. Provide sample materials and background to consultant   | DDID                           | April 2002    |                           | April 2002             |   |
| 6.2.1.3. Engage in campaign planning study (see strategy 6.2.3.) in order to tailor communication pieces to new audience | Consultant                     | June 2002     | Aug. 2002                 |                        |   |
| 6.2.1.4. Determine staffing needs to deliver campaign communications plan and timeframe for delivery                     | Consultant<br>DDID/ED          | July 2002     | Aug. 2002                 |                        | If indicated through analysis, this expense must be built into the campaign budget.                               |

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|---|--------------------|------------|------------|--|---|
| 6.2.1.5. Draft, finalize, and produce campaign collateral materials, including case statement | Consultant<br>DDID | April 2002 | Sept. 2002 |  |   |
| 6.2.1.6. Hire necessary communications staff (if approved through analysis of 6.2.1.4.)       | DDID               | Sept. 2002 | Oct. 2002  |  | This could be a shared position with general Museum PR/Mktg |

DDID: Deputy Director of Institutional Development

CCC: Capital campaign consultant

ED: Executive Director

# San Diego Natural History Museum

## ACTION PLAN

**Key Result Area 6:** Enhance Financial Stability

**Planning Leader:** Ann Laddon

**Objective 6.2:** Raise \$20 million in permanent exhibit funding and \$3 million in building completion funding over the next five fiscal years (2003-2008)

**Dates of Action Plan:** 2002-2012

**Strategy 6.2.2:** Develop, initiate, and implement the campaign plan

**Presented:**

**Approved:**

| Action Steps<br>(Numbered)   | Who<br>Responsible<br>(*Lead<br>person) | Starting<br>Date | Scheduled<br>Completion<br>Date | Actual<br>Completion<br>Date | REMARKS (e.g., opportunities or<br>problems uncovered; talents or<br>weaknesses revealed; coordinated<br>efforts required) |
|--|---|------------------|---------------------------------|------------------------------|--|
| 6.2.2.1. Review, confirm or modify<br>campaign goals                     | DDID<br>DDA                             | July 2002        | Aug. 2002                       |                              |  |
| 6.2.2.2. Engage in campaign planning<br>study                            | DDID<br>CCC                             | May 2002         | July 2002                       |                              |  |
| 6.2.2.3. Set a campaign timeline based<br>upon results of campaign study | DDID<br>CCC                             | Aug. 2002        | Aug. 2002                       |                              |  |
| 6.2.2.4. Set gift model for campaign                                     | DDID<br>CCC                             | Aug. 2002        | Aug. 2002                       |                              |  |
| 6.2.2.5. Develop campaign prospect list<br>and moves management for each | DDID                                    | Sept. 2002       | Dec. 2002                       |                              | This list will grow and change over the<br>course of the campaign (See Action Plan   |

|   |                               |            |                           |  |  |
|---|-------------------------------|------------|---------------------------|--|--|
|   |                               |            |                           |  | 6.3.1.)  |
| 6.2.2.6. Identify, recruit and train volunteer leadership   | DDID<br>CCC<br>Exec. Dir      | Sept. 2002 | Oct. 2002                 |  | Interface with the board resources committee for potential board candidates, cultivation, and stewardship      |
| 6.2.2.7. Initiate monthly meeting schedule for campaign cabinet   | DDID<br>CCC<br>Campaign Chair | Oct. 2002  | Ongoing through Oct. 2007 |  |  |
| 6.2.2.8. Begin solicitations to secure lead gift for exhibits campaign—"quiet phase"                              | DDID<br>Campaign Chair        | Jan. 2003  | June 2003                 |  | Timing will be determined by results of planning study (6.2.2.3.)  |
| 6.2.2.9. Solicit and secure secondary lead gifts—"quiet phase"  | DDID<br>CCC                   | July 2003  | Dec. 2003                 |  | This will require an average of one major gift solicitation weekly   |
| 6.2.2.10. Move campaign into the Leadership phase and announce to public (at 75% of goal)—"public phase"          | DDID<br>CCC                   | Jan. 2004  | June 2005                 |  | Continued weekly solicitations, as well as ongoing cultivations through annual events (see Action Plan 6.3.5.) |
| 6.2.2.11 Mid-term review  | DDID<br>CCC<br>ED             | March 2005 | April 2005                |  | Is new volunteer leadership required? Is a mid-way study required?   |
| 6.2.2.12. Initiate Community Phase of the campaign and final completion strategy at 90% of goal—"community phase" | DDID<br>CCC                   | June 2005  | Dec. 2005                 |  | Utilize direct mail, mass appeal to reach full Museum membership   |
| 6.2.2.13. Celebrate the completion of the campaign  | DDID<br>DSP                   | March 2006 | March 2006                |  |  |
| 6.2.2.14. Determine the next capital campaign goals and objectives and  | DDID<br>ED                    | June 2006  | Ongoing                   |  | Review status of full strategic plan to determine next campaign priority                                       |

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| initiate planning |  |  |  |  |  |
|-------------------|--|--|--|--|--|

- \* DDID: Deputy Director of Institutional Development
- DDA: Deputy Director of Administration
- CCC: Capital Campaign Consultant
- ED.: Executive Director
- DSP: Director of Special Projects

# San Diego Natural History Museum

## ACTION PLAN

**Key Result Area 6:** Enhance Financial Stability

**Planning Leader:** Anna Hoffmann

**Objective 6.3:** Increase annual contributions from 2002 level, each subsequent year, plus inflation and a percentage increase to be determined through the annual budget process

**Dates of Action Plan:** 2002-2012

**Strategy 6.3.1:** Increase contributed revenue from individuals and family foundations

**Presented:**

**Approved:**

| Action Steps (Numbered)  | Who Responsible (*Lead person) | Starting Date | Scheduled Completion Date | Actual Completion Date | REMARKS (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required) |
|--|--------------------------------|---------------|---------------------------|------------------------|---|
| 6.3.1.1. Review annual reports from Community Foundations to identify new major gift prospects (family foundations and donor advised funds).   | SDO                            | April 2002    | Ongoing                   |                        |   |
| 6.3.1.2. Evaluate President's Circle membership and determine how many prospects are capable of a \$5000+ gift. Develop solicitation strategies for these donors.                          | SDO, DDID                      | May 2002      | August 2002               |                        |   |
| 6.3.1.3. Determine whether Annual Fund Drive and President's Circle campaigns should be blended to create one donor program with gift levels at \$2500, \$5000 and \$10,000 (and higher?). | DDID, DOM, SDO                 | May 2002      | July 2002                 |                        |   |

|   |                |                |           |  |  |
|---|----------------|----------------|-----------|--|--|
| 6.3.1.4. Determine the best place for the President's Circle program to reside: Membership or Major Gifts?  | DDID, SDO, DOM | May 2002       | July 2002 |  | Decision will affect revenue goals for next fiscal year. |
| 6.3.1.5. Develop and implement strategies to recruit new President's Circle members (quarterly recruitment events, peer-to-peer solicitation, Board appeals?) | SDO            | July 2002      | Ongoing   |  |  |
| 6.3.1.6. Introduce annual President's Circle survey to aid in donor cultivation and to capture email addresses.   | SDO, DSP       | July 2002      | Ongoing   |  |  |
| 6.3.1.7. Use Internet to locate and research family foundations.  | SDO            | July 2002      | Ongoing   |  |  |
| 6.3.1.8. Develop strategies to renew lapsed donors.   | SDO            | July 2002      | Ongoing   |  |  |
| 6.3.1.9. Introduce a "Founders Circle" of the President's Circle at the \$1874 level.   | SDO            | August 2002    | Ongoing   |  | Will need to introduce a special benefit for this level. |
| 6.3.1.10. Evaluate how many members are at the \$500/yr level. Develop a strategy to upgrade these members to the President's Circle.                         | SDO, DOM       | August 2002    | Ongoing   |  |  |
| 6.3.1.11. Strengthen electronic communication. Update President's Circle webpage and develop an e-mail distribution list for regular announcements.           | SDO, DW, DSP   | August 2002    | 2003      |  | Save on postage and paper costs.                         |
| 6.3.1.12. Develop a menu of annual gift opportunities for individual and family foundations. Promote on website and in communication pieces.                  | SDO, DDID      | August 2002    | Ongoing   |  |  |
| 6.3.1.13. Develop strategies to attract younger donors to the President's Circle.   | SDO            | September 2002 | Ongoing   |  |  |

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|---|-----------|------------|------------|--|--|
| 6.3.1.14. Determine cost/ benefit of hiring a full-time manager for the President's Circle. Evaluate growth of program and identify ideal time to hire that position. | SDO, DDID | March 2003 | 2004       |  |  |
| 6.3.1.15. Develop a President's Circle brochure.  | SDO       | July 2004  | Sept. 2004 |  |  |
| 6.3.1.16. Introduce a President's Circle Committee of Board and off-board volunteers.   | SDO       | 2005       | 2006       |  |  |

\* SDO      Senior Development Officer  
 DSP      Director of Special Projects  
 DDID      Deputy Director of Institutional Development  
 DOM      Director of Membership  
 DW      Director of Web Development

# San Diego Natural History Museum

## ACTION PLAN

**Key Result Area 6:** Enhance Financial Stability

**Planning Leader:** Anna Hoffmann

**Objective 6.3:** Increase annual contributions from 2002 level, each subsequent year, plus inflation and a percentage increase to be determined through the annual budget process

**Dates of Action Plan:** 2002-2012

**Strategy 6.3.2:** Increase corporate membership program and underwriting support

**Presented:**

**Approved:**

| Action Steps (Numbered)  | Who Responsible (*Lead person) | Starting Date | Scheduled Completion Date | Actual Completion Date | REMARKS (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)                                 |
|--|--------------------------------|---------------|---------------------------|------------------------|---|
| 6.3.2.1. Design and implement a vigorous and original stewardship program for Natural Partner members                  | SDO                            | April 2002    | Ongoing                   |                        | Invite Natural Partners to visit during a Museum Access Fund school tour. Create original recognition pieces, e.g. mini-banners, updated annually |
| 6.3.2.2. Evaluate upcoming exhibit season and identify corporate prospects for title sponsorship of specific exhibits. | SDO                            | May 2002      | July 2002                 |                        | Meet with Exhibits team and DDID.   |
| 6.2.2.3. Develop and implement solicitation proposals and strategies for identified exhibit sponsor prospects          | SDO<br>CAC                     | July 2002     | Aug. 2002                 |                        | 6.3.2.2. and 6.2.2.3. will be repeated annually   |
| 6.3.2.4. Improve and enhance the Natural Partners webpage of sdnhm.org.  | *SDO                           | July 2002     | October 2002              |                        |   |
| 6.3.2.5. Update Natural Partners   | SDO                            | July 2002     | October 2002              |                        | Currently the reply vehicle includes  |

|  |           |              |                |  |   |
|--|-----------|--------------|----------------|--|---|
| response piece and include higher gift levels  |           |              |                |  | \$1250 and \$2500 levels only   |
| 6.3.2.6. Evaluate whether a discount on facility usage is an appropriate benefit for corporate membership.   | SDO, DSE  | July 2002    | September 2002 |  | This would impact Special Events revenue.                               |
| 6.3.2.7. Evaluate in-kind donations and develop a list of high priority needs.   | SDO       | July 2002    | September 2002 |  |   |
| 6.3.2.8. Continue to build a database of corporate prospects and develop a strategy for soliciting gifts.  | SDO       | July 2002    | Ongoing        |  |   |
| 6.3.2.9. Evaluate opportunities for event sponsorship (lectures, film festivals etc.)  | SDO, DE   | August 2002  | Ongoing        |  | Discuss with Director of Education.                                     |
| 6.3.2.10. Introduce an annual corporate event.   | SDO       | October 2002 | Ongoing        |  | Create a presentation using children's thank you letters.               |
| 6.3.2.11. Further grow and develop the Corporate Advisory Committee. Discuss merging this group with proposed Marketing Committee.   | SDO, DM   | Jan. 2003    | 2004           |  | Discuss with Director of Marketing.                                     |
| 6.3.2.12. Evaluate whether we should institute an invoice system to renew corporate memberships.   | SDO       | Feb. 2003    | Mar. 2003      |  |   |
| 6.3.2.13. Determine cost/ benefit of hiring a full-time manager for the corporate membership program. Evaluate growth of corporate membership program and identify ideal time to hire that position. | SDO, DDID | April 2004   | June 2004      |  | This would separate corporate membership from the major gifts position. |
| 6.3.2.14. Create a new corporate membership brochure.  | SDO       | 2004         | 2005           |  |   |

\* SDO           Senior Development Officer  
DSP             Director of Special Projects  
DDID            Deputy Director of Institutional Development  
DOM             Director of Membership

|     |                             |
|-----|-----------------------------|
| DW  | Director of Web Development |
| DM  | Director of Marketing       |
| DE  | Director of Education       |
| DSE | Director of Special Events  |
| CAC | Corporate Advisory Council  |

# San Diego Natural History Museum

## ACTION PLAN

**Key Result Area 6:** Enhance Financial Stability

**Planning Leader:** Elizabeth Castillo

**Objective 6.3:** Increase Annual Contributions

**Dates of Action Plan:** 2002-2012

**Strategy 6.3.3:** Increase foundation and grant revenue

**Presented:**

**Approved:**

| Action Steps  | Who Responsible | Starting Date | Scheduled Completion Date | Actual Completion Date | REMARKS   |
|---|-----------------|---------------|---------------------------|------------------------|---|
| 6.3.3.1 Determine cost effectiveness of hiring additional grant writer for BRCC.                            | DDID/ DDR / ED  | Sept. 2002    | Jan. 2003                 |                        | Quantify potential grant revenue. Subtract position costs (salary, benefits, office space, supplies, etc.) from revenue to determine net income.  |
| 6.3.3.2 Determine reporting structure for BRCC grant writer (reports to DDID, DDR, or ??)                   | DDID / DDR / ED | Jan. 2003     | Mar. 2003                 |                        | Evaluate which structure will best enhance Museum's grant submission efforts and promote internal coordination. Consider dropping "Corporate" from DFCR title if Corporate Major Gifts officer is brought on staff. |
| 6.3.3.3 Budget for and hire BRCC grant writer if cost / benefit analysis shows positive revenue generation. | ED / DDID / DDR | Mar 2003      | June 2003                 |                        | Budget for position in beginning with 2003-2004 annual operating budget.<br><br>Provide six month "lag time" in budget from hiring date for revenue to be   |

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DDID= Deputy Director of Institutional Development  
 DDR= Deputy Director of Research

COO= Chief Operations Officer  
 DCFR= Director of Corporate and Foundation Relations

ED= Executive Director

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|--|--|---|---------------|--|--|
| 6.3.3.4 Develop a coordinated, museum-wide prospect development and grant application process.   | DDID/ DCFR/ COO                            | March 2003  | December 2003 |  | Determine best match for prospects and various Museum programs   |
| 6.3.3.5 Annually develop calendar of Planned submissions for the coming fiscal year for each grant writer.   | DCFR / BRCC Grant Writer                   | March – May 2003, 2004, 2005, 2006, 2007, 2008, 2009, 2010 2011 | May 2011      |  | To predict annual revenue generation from grants that will be available to support Museum operations.  |
| 6.3.3.6 Develop systematic cultivation, stewardship, and reporting processes to ensure effective prospect management and compliance with government and foundation requirements. | DDID / DCFR / BRCC Grant Writer            | March 2003  | December 2003 |  | Ensure that grant reporting and accounting are handled in a systematic and uniform manner (may entail hiring of a grants/contracts manager position; see action plan 6.4.5 “Increase BRCC contract revenue.)   |
| 6.3.3.7 Bi-annually determine prospect research, supplies, equipment, and support staff needs of all grant writers.  | DCFR / BRCC Grant Writer / DDID            | Every January – March<br><br>2003<br>2005<br>2007<br>2009       | March 2009    |  | For inclusion in annual operating budget the following two years.<br><br>To continuously assess ways to enhance revenue generation, e.g., subscriptions, association memberships, database search memberships, color printers, admin. support, etc. Base purchases on cost/benefit analysis. |
| 6.3.3.8 Devise method for allocating facility usage, maintenance, and support costs to each program (program cost accounting.)   | DCFR / BRCC Grant Writer / COO / Contracts | January 2004  | June 2004     |  | To recover expenses from funders who do not allow indirect costs, and to ensure that programs are charging fees sufficient to cover both their direct and  |

|  |         |  |  |  |                    |
|--|---------|--|--|--|--------------------|
|  | Manager |  |  |  | indirect expenses. |
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DDID= Deputy Director of Institutional Development  
DDR= Deputy Director of Research

COO= Chief Operations Officer  
DCFR= Director of Corporate and Foundation Relations

ED= Executive Director

# San Diego Natural History Museum

## ACTION PLAN

**Key Result Area 6:** Enhance Financial Stability

**Planning Leader:** Ann Laddon

**Objective 6.3:** Increase annual contributions from 2002 level, each subsequent year, plus inflation and a percentage increase to be determined through the annual budget process

**Dates of Action Plan:** 2002-2012

**Strategy 6.3.4:** Increase government support (city, county, state, federal)

**Presented:**

**Approved:**

| Action Steps   | Who Responsible<br>(*Lead person) | Starting Date | Scheduled Completion Date | Actual Completion Date | REMARKS (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required) |
|--|-----------------------------------|---------------|---------------------------|------------------------|---|
| 6.3.4.1. Identify, develop and implement strategic alliances with local politicians and representatives who serve in city, county, state and federal positions | ED                                | Aug. 2002     |                           |                        |   |
| 6.3.4.2. Develop menu of Museum funding opportunities tailored towards government support  | ED DDID<br>DDPP<br>DDR            | Aug. 2002     | Nov. 2002                 |                        |   |
| 6.3.5.2. Create a highly structured contact and cultivation plan for reaching elected officials with identified opportunities                                  | ED<br>DDID                        | Dec. 2002     | Feb. 2003                 |                        |   |
| 6.3.4.3. Maintain quarterly contact with local County Supervisors and annual   | ED                                | July 2002     | quarterly                 |                        |   |

|  |            |           |                           |  |  |
|--|------------|-----------|---------------------------|--|--|
| submission of proposals for Community Projects funding (independent of Community Enhancement allocation)             | DDID       |           |                           |  |  |
| 6.3.4.4. Calendar regular visits/contacts with out-of-town representatives by Museum leadership to Sacramento and DC | ED<br>DDID | Feb. 2003 | Twice yearly through 2012 |  |  |

ED= Executive Director

DDID=Deputy Director of Institutional Development

DDPP=Deputy Director of Public Programs

DDR=Deputy Director of Research

# San Diego Natural History Museum

## ACTION PLAN

**Key Result Area 6:** Enhance Financial Stability

**Planning Leader:** Vatei Ouy

**Objective 6.3:** Increase annual contributions from 2002 level, each subsequent year, plus inflation and a percentage increase to be determined through the annual budget process

**Dates of Action Plan:** 2002-2012

**Strategy 6.3.5:** Maximize special event revenue (Dos Aguilas, Fall Gala, etc.), including cultivation and stewardship events.

**Presented:**

**Approved:**

| Action Steps (Numbered)   | Who Responsible (*Lead person) | Starting Date | Scheduled Completion Date | Actual Completion Date | REMARKS (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)   |
|---|--------------------------------|---------------|---------------------------|------------------------|---|
| 6.3.5.1<br>Review and evaluate pricing for other similar events in town to determine increased pricing-point.                                       | *DSP                           | July 2002     | December 2002             |                        | Results from the Fall 2002 Gala will provide valuable data on how realistic our current pricing is. The Fall Gala will be considerably smaller than the Dedication Gala in 2001, and with a 2 <sup>nd</sup> annual fundraiser (Dos Aguilas), we may be limited in how much we can increase our ticket prices. |
| 6.3.5.2<br>Survey other organizations with annual fundraisers to determine history of their pricing points  | *DSP                           | July 2003     | November 2003             |                        |   |
| 6.3.5.3<br>Increase ticket prices with strength of the economy  | *DSP                           | January 2004  | Ongoing                   |                        |   |
| 6.3.5.4<br>Strategically select Annual Gala Honorary Chairs and Dos Aguilas Honorees. Dos Aguilas' revenues will greatly depend on the strength and | DSP<br>DDID                    | July 2002     | Ongoing annually          |                        |   |

|   |                                     |                |                     |  |   |
|---|-------------------------------------|----------------|---------------------|--|---|
| status of the honoree.  | SDO<br>Volunteer Leadership         |                |                     |  |   |
| 6.3.5.5<br>Strategically select event chairs who have great influence in the community  | DSP<br>DDID                         | July 2002      | Ongoing<br>Annually |  |   |
| 6.3.5.6<br>Identify and create prospect list with keen interest in the Museum and special events/galas.   | DSP                                 | July 2002      | Ongoing<br>Annually |  |   |
| 6.3.5.7<br>Identify binational prospects annually to become title sponsor of Dos Aguilas  | DSP<br>DDID<br>Volunteer Leadership | September 2002 | Ongoing             |  |   |
| 6.3.5.8<br>Identify in-kind underwriting opportunities for the Annual Gala to offset expenses   | DSP                                 | March 2003     | Ongoing             |  |   |
| 6.3.5.9<br>Identify in-kind underwriting opportunities for Dos Aguilas to offset expenses   | DSP                                 | October 2002   | Ongoing             |  |   |
| 6.3.5.10<br>Evaluate the benefit of having volunteer event committee  | DSP                                 | October 2002   | Ongoing             |  |   |
| 6.3.5.11<br>Develop volunteer base for events   | DSP                                 | October 2002   | Ongoing             |  |   |
| 6.3.5.12<br>Add 2 stewardship/cultivation events for top prospects and major donors   | DSP<br>SDO                          | July 2002      | Ongoing             |  |   |
| 6.3.5.13<br>Utilize additional administrative support (pending recruitment of proposed AA staff member for development), which would allow DSP additional time to identify and secure underwriting support. | DSP                                 | July 2003      | Ongoing             |  | AA could assist with event database management, prepare solicitation packets, and other time consuming event logistics. |

|  |                                     |                |              |  |  |
|--|-------------------------------------|----------------|--------------|--|--|
| 6.3.5.14<br>Increase Dos Aguilas' modest lower ticket price.   | DSP<br>DDID<br>Volunteer Leadership | September 2004 | Ongoing      |  | Review annually to determine possibility of incremental increase, keeping in mind that the Fall Gala will generate the most revenue. |
| 6.3.5.15<br>Explore additional lower cost fundraising event opportunities (events would need to be underwritten) | DSP                                 | January 2005   | January 2006 |  |  |

\*Director of Special Projects (DSP)  
 Deputy Director of Development (DDID)  
 Senior Development Officer (SDO)

# San Diego Natural History Museum

## ACTION PLAN

**Key Result Area 6:** Enhance Financial Stability

**Planning Leader:** James Haddan

**Objective 6.3:** Increase annual contributions from 2002 level, each subsequent year, plus inflation and a percentage increase to be determined through the annual budget process

**Dates of Action Plan:** 2002-2012

**Strategy 6.3.6:** Increase the Museum's membership and associated revenue

**Presented:**

**Approved:**

| Action Steps   | Who Responsible<br>(*Lead person) | Starting Date  | Scheduled Completion Date | Actual Completion Date | REMARKS (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)   |
|--|-----------------------------------|----------------|---------------------------|------------------------|---|
| 6.3.6.1. Research membership growth rates at similar institutions and set an appropriate 10 year goal  | MD                                | 1 July 2002    | October 2002              |                        | Calendar review every two years   |
| 6.3.6.2. Membership survey (funded by Arts Market)   | MD                                | Spring 2002    |                           |                        | Budget and calendar such surveys every three years.   |
| 6.3.6.3. Review membership benefits and pricing levels and develop plan for adjustment (review to occur every third year)  | MD/DDID                           | Summer 2002    | 2002                      |                        | Utilize the Arts Market funded survey to create a baseline.   |
| 6.3.6.4. Expansion of benefits thru partnerships with other institutions and further "branding" of our memberships – perhaps by emphasizing belonging to a "Society" | MD                                | Began 1/1/2001 | ongoing                   |                        | Working off the model first started with the Fleet last year, develop an ongoing benefit exchange program or sharing of benefits at higher levels (a linked membership for example) |

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|--|------------|--------------|-------------|--|---|
| 6.3.6.5. Develop strategies to pursue member upgrades - \$75-125 levels  | MD         | June 2002    | Winter 2003 |  |   |
| 6.3.6.6. Develop plan to reach 10 year goal. Will most likely include steps beyond those already identified.   | MD         | January 2003 | Spring 2003 |  | Plan to include annual benchmarks for review of performance against goal/plan |
| 6.3.6.7. Implement first phase membership growth plan  | MD         | Spring 2003  |             |  |   |
| 6.3.6.8 Work with Marketing and Gate Team to ensure front line staff present and enthusiastic message consistent with Museum's overall marketing plan. | MD         | Winter 2002  | Spring 2003 |  |   |
| 6.3.6.9. Analyze results of year-one efforts.  | MD/DDID    | Winter 2004  | Winter 2004 |  |   |
| 6.3.6.10. Implement second phase of membership growth plan.  | MD         | Spring 2004  | Spring 2005 |  |   |
| 6.3.6.11. Plan and initiate second membership survey   | MD/DM      | Spring 2005  |             |  | Work with other Museum departments to increase functionality of the survey    |
| 6.3.6.12. Recurring review of benefits and pricing   | MD/DDID    | Summer 2005  | 2005        |  |   |
| 6.3.6.13. Implement any changes indicated by the survey  | MD         | 2006         | 2006        |  |   |
| 6.3.6.14. Review growth against goals at the four-year mark  | MD/DDID/DM | 2006         |             |  |   |
| 6.3.6.15. Plan and initiate third membership survey  | MD/DM      | 2008         | 2008        |  |   |
| 6.3.6.16. Implement any changes  | MD/DDID    | 2009         |             |  |   |

|                         |  |  |  |  |  |
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| indicated by the survey |  |  |  |  |  |
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# San Diego Natural History Museum

## ACTION PLAN

**Key Result Area 6:** Enhance Financial Stability

**Planning Leader:** James Haddan

**Objective 6.3:** Increase annual contributions from 2002 level, each subsequent year, plus inflation and a percentage increase to be determined through the annual budget process

**Dates of Action Plan:** 2002-2012

**Strategy 6.3.7:** Increase net revenue from direct mail campaigns

**Presented:**

**Approved:**

| Action Steps   | Who Responsible | Starting Date | Scheduled Completion Date | Actual Completion Date | REMARKS (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)   |
|--|-----------------|---------------|---------------------------|------------------------|---|
| 6.3.7.1. Continue the researching and implementing new strategies in direct mail projects. These will include better use of internet technologies, more refined donor targeting, and consistent refinement of direct mail materials. | MD              | Spring 2002   | ongoing                   |                        | continue testing select donor/market lists, test and revise (if needed) various direct mail formats.  |
| 6.3.7.2. Implement a telephone campaign to thank donors for gifts between \$100-999.   | MD              | January 2003  | Spring 2003               |                        | Plan to include annual benchmarks for review of performance against goal/plan   |
| 6.3.7.3. Implement web-based donations vehicle for Fall 2002 Annual Fund   | MD              | Summer 2002   | Nov. 2002                 |                        | This can expand to support fundraising event ticket sales in collaboration with the Director of Special Projects  |
| 6.3.7.4. Research and prepare a recommendation regarding a "split" annual fund appeal.   | MD              | October 2002  | Spring 2003               |                        | Could possibly provide a more constant stream of revenue as well as minimize member/donor confusion regarding various direct mail appeals and standard membership procedures (renewal notices |

|   |            |             |             |  |  |
|---|------------|-------------|-------------|--|--|
|   |            |             |             |  | for example).  |
| 6.3.7.5.Implement and test potential “split” annual fund appeal.  | MD         | Fall 2003   | Winter 2005 |  | This will be tested for two years in order to accurately assess its performance.   |
| 6.3.7.6.Plan for increase of frequency of direct mail appeals from one annually to a maximum of three annually (in addition to acquisition) | MD         | Summer 2002 | Ongoing     |  | These could possibly rely on graphically dynamic postcard/web based materials to ensure they are both economical as well as quickly developed. |
| 6.3.7.7. Add second direct mail appeal  | MD         | 2003        | 2003        |  |  |
| 6.3.7.8.Analyze the results of the multiple (2) appeals over two fiscal years   | MD/DDID    | 2003        | 2004        |  |  |
| 6.3.7.9.Add third direct mail appeal (maximum)  | MD         | 2005        | 2005        |  |  |
| 6.3.7.10.Analyze the results of the multiple (3) appeals over two fiscal years  | MD/DDID    | 2005        | 2006        |  |  |
| 6.3.7.11.Analyze “condition” of donor database with goal of a “clean” list  | MA         | 2002        | 2003        |  | The Museum’s donor database serves as key information source and is critical to direct mail success.   |
| 6.3.7.12.Implement necessary “clean-up”, including hiring of part-time staff support if necessary   | MD/MA      | 2003        | 2003        |  |  |
| 6.3.7.13.Analyze integration potential of Raiser’s Edge with other Museum databases.  | MD/DDID/IT | 2003        | 2003        |  |  |
| 6.3.7.12.Implement integration of Museum database systems as determined by the analysis   | MD/IT      | 2004        | ongoing     |  |  |
| 6.3.7.14.Review database staffing needs annually including the possible need for part-time gift entry staff.                                | MD and MA  | FY 2002     | ongoing     |  | Staffing reviewed annually to ensure appropriate resources are in place to ensure proper database functioning.                                 |

# San Diego Natural History Museum

## ACTION PLAN: Education Programs

**Key Result Area 6:** Enhance Financial Stability

**Planning Leader:** Dee Parks

**Objective 6.4:** Enhance and increase earned revenue from 2002 level, each subsequent year plus inflation and a % increase to be determined through the annual business development plan.

**Dates of Action Plan:** 2002–2012

**Strategy 6.4.1:** Increase and maximize revenue from education programs (classes, lectures, trips, school programs)

**Presented:**

**Approved:**

| Action Steps  | Who Responsible<br>(*Lead) | Starting Date | Scheduled Completion Date | Actual Completion Date | Remarks  |
|---|----------------------------|---------------|---------------------------|------------------------|--|
| 6.4.1.1. Obtain funding to provide exclusive screenings of new large format movies.   | *DDID, ED, MFM             | 2004          | 2005                      |                        | See 1.4.7.1. The Fleet Science Center helps to fund movies, that is how they get many of the first run movies. |
| 6.4.1.2. Funding for production of new signature movie for SDNHM  | *DDID, ED                  | 2005          | 2008                      |                        | See 1.4.7.2. Ocean Oasis will be five years old and will need to be updated.                                   |
| 6.4.1.3. Develop strategy to run "A" movies in theater to increase attendance. Formalize agreement with Fleet Science Center. | *DDID, ED, MFM             | 2003          | On going                  |                        | See 1.4.7.3.   |
| 6.4.1.4. Potential increase revenue from Film Festivals.  | *PPM, MFM, YPM             | 2003          | On going                  |                        | See 1.4.7.4. Family, Banff, Mt., Environmental, etc.   |
| 6.4.1.5. Potential increase revenue from one time large format film shows to attract generation X/Y.                          | *PPM, MFM                  | 2004          | On going                  |                        | See 1.4.7.5. Extreme sports?   |
| 6.4.1.6. Potential increase revenue   | *PPM, DM,                  | 2004          | 2005                      |                        | See 1.4.2.5.   |

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| from programming which will encourage the affluent Babyboomers to become part of the SDNHM experience.  | DOM                      |      |          |  |  |
| 6.4.1.7. Funding for close caption or infrared hearing headsets for large format movies to encourage the Deaf communities participation in the theater. | *MFM, DDID               | 2003 | 2005     |  | See 1.4.2.6  |
| 6.4.1.8. Funding for interpreters for lectures both Spanish interpreters and the deaf community.  | *DDID, DM                | 2004 | 2005     |  | See 1.4.5.12, 1.4.2.7  |
| 6.4.1.9. Potential increase revenue from development of Naturalist Certificate program on-site and on the website.                                      | *DE, DBRCC, DW, DV       | 2005 | On going |  | See 1.4.6.6, 1.4.2.8. Start with one program (maybe paleontology) and then expand to botany, entomology, birds & mammals. Website and volunteer involvement. |
| 6.4.1.10. Seek funding for under represented audiences to participate in SDNHM programs.  | *DDID, DE                | 2004 | On going |  | See 1.4.2.9. Funding for high school and college students to attend lectures and workshops.  |
| 6.4.1.11. Potential increase revenue from creating environmental education workshops for outside agencies.  | *PPM, DM, DBRCC          | 2004 | On going |  | See 1.4.2.10. Focus on training for environmental surveys.   |
| 6.4.1.12. Potential increase revenue by identifying nature oriented clubs to bring their meetings to SDNHM.   | DM, DSE, DE              | 2002 | 2003     |  | See 1.4.2.11.  |
| 6.4.1.13. Funding for increasing the number of SDNHM vans to at least 2 vans for Museum use.  | *DDID, DE                | 2006 | 2007     |  | See 1.4.2.13.  |
| 6.4.1.14. Funding to bring "Big" named speakers that have audience appeal.  | *DDID                    | 2002 | On going |  | See 1.4.2.14.  |
| 6.4.1.15. Funding for the taping of lectures and workshops for broadcast to colleges, high schools, and the public. Spanish translations for taped      | *DDID, MFM, PPM, SDNHMTC | 2002 | On going |  | See 1.3.3.1, 1.4.6.2, 1.4.2.16, and 1.3.3.8. San Diego State University, Time Warner, Cox Cable, TJ television   |

|  |                  |                |              |  |  |
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| lectures to air in Baja California.  |                  |                |              |  | stations, SDCOE.   |
| 6.4.1.16. Potential increase revenue from increase programming offered by the Canyoneers to promote school-site programs.  | *SPM, Canyoneers | June, 2002     | October 2002 |  | See 1.3.1.4. Work with Director of Volunteer Services and Canyoneers.                  |
| 6.4.1.17. Funding for a mobile exhibit van and follow through as needed.   | DE               | January 2003   | July 2004    |  | See 1.3.1.7  |
| 6.4.1.18 Potential increase revenue from establishing a teacher training program.  | *SPM, DE         | September 2002 | Ongoing      |  | See 1.4.1.11. Work with webteam, and County Office of Education. See 1.3.2.2, 1.3.3.9. |
| 6.4.1.19. Funding for under represented youth and family public program audiences (including low-income, military, rural, North and East County, and home school communities) through evaluations, questionnaires, and focus groups where appropriate. | YPM              | October 2002   | October 2003 |  | See 1.4.3.4.   |
| 6.4.1.20. Potential increase revenue from reviewing summer camp structure and procedures to optimize program offerings and program organization.   | YPM              | September 2002 | June 2012    |  | See 1.4.3.5.   |
| 6.4.1.21. Potential increase revenue from expanding and evaluating YMCA programs to maximize program offerings both on and off-site.   | YPM              | September 2002 | June 2012    |  | See 1.4.3.7.   |
| 6.4.1.22. Potential increase revenue from investigating creative ways to increase group participation and sign-ups in programs.  | YPM, EOM, PPM    | September 2002 | June 2012    |  | See 1.4.3.12.  |
| 6.4.1.23. Potential increase revenue from adaptations of existing programs to target home school market.   | SPM, YPM         | September 2003 | July 2003    |  | See 1.4.3.15.  |
| 6.4.1.24. Potential increase revenue   | YPM              | September      | June 2012    |  | See 1.4.3.19.  |

|  |     |                |                |  |               |
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| from offering scout programs for a variety of age and price ranges.  |     | 2002           |                |  |               |
| 6.4.1.25. Potential increase revenue from offering overnight and other scout programs off site.                      | YPM | September 2002 | June 2012      |  | See 1.4.3.20. |
| 6.4.1.26. Potential increase revenue from expanding Ms. Frizzle program to include off-site programs and assemblies. | YPM | May 2002       | September 2002 |  | See 1.4.3.21. |

**Position Key:**

DE Director of Education  
DDID Deputy Director of Institutional Development  
PPM Public Programs Manager  
MFM Manager of Film and Multimedia  
DM Director of Marketing/Public Relations  
DSE Director of Special Events  
EOM Education Office Manager  
DOM Director of Membership  
DW Director of Web Development  
DV Director of Volunteer Services  
ED Executive Director  
YPM Youth Program Manager  
SPM School Programs Manager

# San Diego Natural History Museum

## ACTION PLAN

**Key Result Area 6:** Enhance Financial Stability

**Planning Leader:** Mark Berlin/Delle Willett

**Objective 6.4:** 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

**Dates of Action Plan:** 2002-2012

**Strategy 6.4.2:** Increase admissions revenue

**Presented:**

**Approved:**

| Action Steps<br>(Numbered)  | Who Responsible<br>(*Lead person) | Starting Date  | Scheduled Completion Date   | Actual Completion Date | REMARKS (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)  |
|---|-----------------------------------|--|-----------------------------|------------------------|--|
| 6.4.2.1 Annually review Museum admission prices to determine appropriate pricing point  | *VSM/COO                          | Annually, beginning September 1, 2002  | September 1, 2011           |                        | <ul style="list-style-type: none"> <li>- Research prices of other cultural attractions (local and national)</li> <li>- Determine whether lower prices/ increased volume (vs. higher prices/lesser volume) will produce the most income.</li> </ul>   |
| 6.4.2.2 Analyze and implement an "a la carte" pricing structure for admission to exhibitions, first run movies, and other Museum attractions. | *VSM/AVSM                         | Four months prior to opening of "Fossil Mysteries" (tentative start date of July 2004) | Opening of Fossil Mysteries |                        | <ul style="list-style-type: none"> <li>- Work with Education Dept. staff to develop schedule for renting first-run movies to attract visitors</li> <li>- Be involved in decision making process for exhibits from a visitors perspective</li> <li>- Develop operational procedures for handling visitors paying for "a la carte" attractions.</li> <li>- With Marketing Dept., develop and implement a marketing plan</li> </ul> |

|  |                      |                   |                   |  |  |
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|  |                      |                   |                   |  | to publicize movies.   |
| 6.4.2.3 Cultivate relationships with hotel concierges, ConVis, Old Town Trolley, and other tourist organizations that can recommend the Museum as a tourist destination. | *VSM/AVSM/<br>MKTCOR | September<br>2002 | continuous        |  | - Coordinate special screenings for organizations that can send us more visitors   |
| 6.4.2.4 Evaluate possible vending opportunities to promote visitor spending in the Museum.   | *VSM/AVSM            | September<br>2002 | September<br>2004 |  | Examples of opportunities to be considered:<br><ul style="list-style-type: none"> <li>- Food service</li> <li>- Penny machines (a machine at the Field Museum produces \$30k income annually)</li> <li>- Photo booths</li> <li>- Rock climbing wall</li> <li>- Dinosaur simulator ride (Exhibits Dept. has info)</li> <li>- Interactive rides</li> </ul> |
|  |                      |                   |                   |  |  |

# San Diego Natural History Museum

## ACTION PLAN

**Key Result Area 6:** Enhance Financial Stability

**Planning Leader:** Ronnie Schneider/Elizabeth Castillo

**Objective 6.4:** Increase Revenue from Earned Income

**Dates of Action Plan:** 2002-2012

**Strategy 6.4.3:** Increase and maximize facility usage revenue

**Presented:**

**Approved:**

| Action Steps<br>(Numbered)   | Who Responsible<br>(*Lead person) | Starting Date  | Scheduled Completion Date | Actual Completion Date | REMARKS (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)               |
|--|-----------------------------------|----------------|---------------------------|------------------------|---|
| 6.4.3.1 Assess all Museum spaces available for facility usage  | DSE                               | July 2002      | September 2002            |                        | e.g., Atrium, rooftop, LB, treasures, theater, boardroom, discovery area, double classroom, classrooms, Scripps wing, and plaza |
| 6.4.3.2 Conduct market comparison of rates being charged for similar venues  | DSE                               | September 2002 | December 2002             |                        | Look at other museums, hotels, public spaces, etc.  |
| 6.4.3.3 Determine "hard costs" to host an event (building operations staff, security, SE staff, utilities, etc.)     | DSE                               | September 2002 | December 2002             |                        |   |
| 6.4.3.4 Determine appropriate pricing structure for each Museum space based on hard costs and competing venue rates. | DSE / COO                         | January 2003   | March 2003                |                        |   |

|   |           |            |                |  |   |
|---|-----------|------------|----------------|--|---|
|   |           |            |                |  |   |
| 6.4.3.5 Determine realistic calendar of rental days available, based on public programs and other non-revenue generating usage. | DSE / DPP | April 2003 | May 2003       |  | Preliminary estimate is 104 days (2 days / week x 52 weeks.)  |
| 6.4.3.6 Determine annual revenue goal   | DSE / COO | May 2003   | July 2003      |  | Multiply number of expected rental days times average rental rate.<br><br>Preliminary estimate of average possible income is \$364,000 (2 rentals a week x \$3500.) |
| 6.4.3.7 Determine resources needed to achieve maximum facility usage.   | DSE / COO | July 2003  | September 2003 |  | e.g., promotional materials, website revisions, conference attendance, staff support, etc.  |
| 6.4.3.8 Develop annual expenses budget (e.g., DSE salary/ benefits, building operations support, security, etc.)                | DSE / COO | May 2003   | September 2003 |  | Subtract operating costs from expected revenue to calculate net revenue anticipated, and to assess cost effectiveness of operations.                                |
| 6.4.3.9 Assess ways that revenue-generating facility usage can be maximized.  | DSE / DPP | July 2003  | December 2003  |  | e.g., Improving internal coordination with public programs and other departments to maximize facility availability.   |
|   |           |            |                |  |   |

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|---|-----------------------|--------------|---------------|--|---|
| 6.4.3.10 Specify challenges that are preventing maximum revenue generation.   | DSE                   | July 2003    | December 2003 |  | <p>e.g., - construction far from being complete,</p> <ul style="list-style-type: none"> <li>- not enough staffing,</li> <li>- not enough promotions budget,</li> <li>- logistical challenges working with the city, parks and recreation dept.,</li> <li>- at least three months a year with no traveling exhibit to promote and no use of LB,</li> <li>- Challenges with floor plan of Museum. (only one event can be held at a time.</li> <li>- "Freebies." Too many times a client will ask for discounts from staff, board, etc. and what would be a healthy bottom line is reduced to hard costs or no revenue at all.</li> </ul> <p>-</p> |
| 6.4.3.11 Develop strategies to overcome above challenges, and timeline for implementing those that are determined to be feasible, cost-effective solutions. | DSE / Management Team | January 2004 | June 2004     |  |   |
| 6.4.3.12 Implement above strategies per timeline specified  | DSE                   | July 2004    | ongoing       |  |   |
| 6.4.3.13 Determine cost effectiveness of having store open during all evening events.   | DSE / DRO             | January 2004 | March 2004    |  | <p>Currently, hard cost prohibits the store remaining open. SE is charged \$250.00 per event for each night the store is requested.</p> <p>Consider increasing rental rates to absorb this cost, or determine if store can generate sufficient revenue to cover this cost so it doesn't get charged to SE.</p>  |

|  |                |   |   |  |  |
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| <p>6.4.3.14 Assess cost effectiveness of adding staff to SE department.</p> <p>a) Determine duties that could be assigned to support staff (e.g., checking in vendors, setting up tables, closing Museum, etc.)</p> <p>b) Determine cost to hire staff to perform those duties.</p> <p>c) Itemize promotional activities that SE Director could accomplish with the above duties delegated.</p> <p>d) Quantify extra revenue that could be generated through these promotional activities.</p> <p>e) Subtract support costs from additional revenue to determine cost / benefit.</p> | DSE / COO      | March 2004                                | <p>September 2004</p> <p>Re-evaluate every two years thereafter</p> <p>(2006, 2008, 2010)</p> |  | <p>Currently, one person is responsible for everything from the first contact call, to closing the museum after the vendors have left.</p> <p>Additional staff would allow:</p> <ul style="list-style-type: none"> <li>- more events,</li> <li>- extra time for sales solicitations,</li> <li>- travel to other states to promote our venue with CONVIS and national destination management companies.</li> </ul> <p>Dream list would include a staff or 3-4 event coordinators to actually run events and additional staff as building ops who are focused exclusively on events (both day and evening events.)</p> |
| <p>6.4.3.15 Develop marketing plan to promote Special Event usage.</p>   | DSE / COO / MD | September 2002                            | June 2003   |  | <p>Determine which national conferences would provide maximum exposure to showcase Museum as a special event venue.</p>  |
| <p>6.4.3.16 Assess cost effectiveness of developing new promotional materials. Develop as determined by assessment.</p>  | DSE / COO / MD | <p>December 2004</p> <p>December 2007</p> | <p>June 2005</p> <p>June 2008</p>   |  | <ul style="list-style-type: none"> <li>- Develop prototype of materials</li> <li>- Estimate number of packets needed and multiply x estimated distribution to determine cost.</li> <li>- Measure cost against expected revenue increase.</li> </ul>  |

|   |                 |                |                |  |  |
|---|-----------------|----------------|----------------|--|--|
| 6.4.3.17 Integrate Museum website into Special Events marketing strategy.   | DSE / Webmaster | January 2003   | September 2003 |  | e.g., offering birds-eye-views of each space available.  |
| 6.4.3.18 Assess cost effectiveness of purchasing equipment to lease to facility users (instead of them renting tables and chairs from an outside vendor.) | DSE / COO       | July 2004      | December 2004  |  | Can generate from \$500 -\$1500.00 per event renting to clients.<br>Factor in costs of:<br>- setting aside square foot for storage<br>- Staff needed to set up and take down<br>Cost of purchase will need to be included in that year's operational budget. |
| 6.4.3.19 Assess cost / benefit of creating store items especially for corporate clients (e.g., logo items.)   | DSE / DRO       | September 2004 | June 2005      |  |  |

DSE: Director of Special Events  
DRO: Director of Retail Operations

COO: Chief Operations Officer  
MD: Marketing Director

DDPP: Deputy Director, Public Programs

# San Diego Natural History Museum

## ACTION PLAN

**Key Result Area 6:** Enhance Financial Stability

**Planning Leader:** Nancy Stevens

**Objective 6.4:** 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

**Dates of Action Plan:** 2002-2012

**Strategy 6.4.4:** Increase store revenue

**Presented:**

**Approved:**

| Action Steps (Numbered)   | Who Responsible (*Lead person) | Starting Date | Scheduled Completion Date     | Actual Completion Date | REMARKS (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)                      |
|---|--------------------------------|---------------|-------------------------------|------------------------|--|
| TRADITIONAL: On-Site Retail Merchandising<br><br>6.4.4.1 Determine % of increase in retail sales per year in existing Main and Exhibition Stores, that % to achieve compounded sales growth goal at the end of ten years. | ED<br>COO<br>MRO               | 2002          | Ongoing annual budget process |                        | Determine goal for sales level by year 2012, then determine annual % required.<br><br>Exhibition Store open approx. 9 months per year. |
| 6.4.4.2 Determine merchandising needs of after-hours events and programs by calculating # of events store involved in first year.   | MPP<br>MRO<br>AMRO             | 2003          | Ongoing annually              |                        | Determine manhour requirements for after-hour MSA staffing needs.<br><br>Conduct cost/benefit analysis.                                |
| 6.4.4.3 Explore revenue potential in merchandising opportunities related to facility rentals.   | COO<br>MRO                     | 2002          | 2003                          |                        | With Special Events Coordinator, establish average number of special events per year to include merchandise                            |

|  |                         |           |                  |  |  |
|--|-------------------------|-----------|------------------|--|--|
|  | DSE                     |           |                  |  | project.<br>Explore vendor partnerships opportunities.<br>Determine staffing requirements.   |
| 6.4.4.4 Develop calendar of Museum Store promotions.   | MRO<br>AMRO<br>DM       | 2002      | Ongoing annually |  | Work with Marketing Dept. to propose an advertising budget for promotional events.   |
| 6.4.4.5 Examine re-opened side of museum for traffic flow. Determine if south exiting visitor traffic bypasses current museum store areas.       | COO<br>MRO              | 2002      | 2002             |  | Determine need for store promotion or outpost on south side of building.   |
| 6.4.4.6 Assess current POS system - now 5 yrs. old. Determine future technology needs and develop timeline for cost analysis and implementation. | COO<br>NA<br>MRO*<br>WM | 2002      | 2003             |  | Consider future wholesale and on-line opportunities.   |
| TRADITIONAL: On-Line Retail Merchandising<br><br>6.4.4.7 Develop coordinated plan for existing on-line store and its growth over 10 years.       | COO<br>MRO*<br>DM<br>WM | Jan. 2003 | Ongoing          |  | Need for product layout, photography and copywriting.<br><br>Consult with Marketing, Webteam<br><br>Easier access to on-line store on the website. |
| 6.4.4.8 Determine approximate timetable for re-starting interior design project of existing Main and Exhibition Stores.                          | ED*<br>COO*<br>MRO      | May 2003  | July 2003        |  | Immediate need exists for appropriate store fixtures.  |

|  |                                 |                  |                   |  |  |
|--|---------------------------------|------------------|-------------------|--|--|
| <p>TRADITIONAL: Off-Site Retail Merchandising</p> <p>6.4.4.9 Coordinate with departments involved in off-site events to determine merchandising involvement, i.e. booksignings, promotional events, etc.</p> | <p>MRO</p> <p>AMRO</p>          | <p>June 2003</p> | <p>Ongoing</p>    |  | <p>With Education, Marketing, and Research Departments.</p>              |
| <p>6.4.4.10 Continue and expand involvement with Balboa Park Museum Stores activities.</p>   | <p>MRO</p>                      | <p>2003</p>      | <p>Ongoing</p>    |  | <p>Coordinate with SDNHM Marketing Dept. and Balboa Park Promotions.</p> |
| <p>6.4.4.11 Explore feasibility of off-site retail opportunities in San Diego area.</p>  | <p>COO</p> <p>MRO</p> <p>DM</p> | <p>May 2004</p>  | <p>Sept. 2004</p> |  | <p>Determine staffing requirements.</p> <p>Determine cost/benefit.</p>   |

**Position Key:**

|      |                                  |
|------|----------------------------------|
| AMRO | Assistant Manager, Retail        |
| COO  | Chief Operating Officer          |
| DDPP | Deputy Director, Public Programs |
| DM   | Director of Marketing            |
| DSE  | Director of Special Events       |
| ED   | Executive Director               |
| MPP  | Manager, Public Programs         |
| MRO  | Manager, Retail Operations       |
| NA   | Network Administrator            |
| WM   | Website Manager                  |

# San Diego Natural History Museum

## ACTION PLAN

**Key Result Area 6:** Enhance Financial Stability

**Planning Leader:** Elizabeth Castillo/Paisley Cato

**Objective 6.4:** Enhance Traditional Earned Revenue

**Dates of Action Plan:** 2002-2012

**Strategy 6.4.5:** Increase revenue from research contracts

**Presented:**

**Approved:**

| Action Steps<br>(Numbered)  | Who<br>Responsible<br>(*Lead<br>person) | Starting<br>Date | Scheduled<br>Completion<br>Date | Actual<br>Completion<br>Date | REMARKS (e.g., opportunities or<br>problems uncovered; talents or<br>weaknesses revealed; coordinated<br>efforts required)  |
|---|---|------------------|---------------------------------|------------------------------|---|
| 6.4.5.1 Assess availability of field work contracts for each research department. | DDR / ED                                | Sept. 2002       | March 2003                      |                              | Botany, Birds/Mammals, and Entomology appear to have to the most potential for contract revenue, with some work available for herpetology. Revenue generated from field work would be used to support dept. BRCC salaries and research. |
| 6.4.5.2 Determine potential revenue that could be generated annually.             | DDR / COO                               | March 2003       | May 2003                        |                              | Quantify potential contract revenue for each department (# of contracts available x \$\$ for each contract.)  |

|   |                      |  |                                   |  |   |
|---|----------------------|--|-----------------------------------|--|---|
| 6.4.5.3 Determine staffing needed to perform those contracts.   | DDR                  | Dec. 2002  | May 2003                          |  | <p>Include cost of hiring field assistants to perform contract work, and of department directors' time to supervise field staff.</p> <p>Include cost of hiring a grants / contracts manager to perform accounting, invoicing, and internal cost accounting functions for contract management.</p> |
| 6.4.5.4 Determine if contract expansion is cost effective.  | DDR / COO            | May 2003   | July 2003                         |  | <p>Determine what rate Museum would need to charge to cover operating expenses plus overhead.</p> <p>Perform cost / benefit analysis between anticipated revenue and cost to fulfill and manage contracts program.</p>  |
| 6.4.5.5 If contracts expansion is determined to be cost effective, develop timeline and plan for generating new contracts in applicable research areas. | DDR / CO / ED        | July 2003  | December 2003                     |  | With input from each research department director.  |
| 6.4.5.6 Implement plans per above timelines.  | DDR / Research staff | January 2005   | TBD                               |  | e.g. 1) Advertise availability of contract services to potential clients; 2) Respond to "Requests for Proposals" to secure contract work; 3) Recruit, hire, and train field assistants; 4) Hire contract manager.   |
| 6.4.5.7 Annually assess contract opportunities and pricing to ensure Museum covers its hard and soft costs for performing the contracts.                | DDR / COO            | 4 <sup>th</sup> quarter 2006, 2007, 2008, 2009, 2010, 2011 | June 30 <sup>th</sup> 2006 - 2011 |  |   |

DDR=Deputy Director of Research  
COO=Chief Operating Officer  
ED-Executive Director

# San Diego Natural History Museum

## ACTION PLAN

**Key Result Area 6:** Enhance Financial Stability

**Planning Leader:** Nancy Stevens

**Objective 6.5:** Identify and develop sources for non-traditional contributed and earned revenue

**Dates of Action Plan:** 2002-2012

**Strategy 6.5.1:** Develop and market exclusive SDNHM retail products

**Presented:**

**Approved:**

| Action Steps (Numbered)  | Who Responsible (*Lead person)                       | Starting Date | Scheduled Completion Date | Actual Completion Date | REMARKS (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required)  |
|--|--|---------------|---------------------------|------------------------|--|
| <p>NON-TRADITIONAL: Product Development</p> <p>6.5.1.1 Consider Museum-Developed Product: determine most appropriate and lucrative assortment for product reproductions, adaptations, and publications based on museum collections, i.e. Valentienis, etc.</p> <p>Also determine product development focus related to permanent exhibition experience (see 6.5.2.4 Branding opportunities)</p> | <p>DDID</p> <p>COO</p> <p>MRO</p> <p>C</p> <p>ED</p> | 2002          | Ongoing                   |                        | <p>Solicit product research from other Museum Store Association Members.</p> <p>“Working Budget” to be developed, to include marketing of products.</p> <p>Funding needed.</p> <p>Project timelines needed.</p> <p>Distribution network and shipping operation required.</p> <p>Coordinate with Research &amp; Collections, Marketing, Development, and Exhibit Development.</p> |
| 6.5.1.2 Consider Licensed Product Development opportunities: i.e. other Valentienis, fossil reproductions, etc.  | MRO*   | 2002          | Ongoing                   |                        | Vendor finances, produces (with curatorial approval) and distributes product usually exclusively, museum   |

|  |                               |      |         |  |   |
|--|-------------------------------|------|---------|--|---|
|  |                               |      |         |  | receives royalty %.<br>Coordinate with Research & Collections.  |
| 6.5.1.3 Consider Product Partnering Opportunities: start with existing associations i.e. Scholastic (MSB, Ms. Frizzle), CinemaCorp (Ocean Oasis and future films.) | COO<br>DDPP<br>MRO            | 2002 | Ongoing |  | Museum produces and sells product, pays royalty % to licensor.<br>Coordinate with Education, Marketing<br>Working budget needed.  |
| 6.5.1.4 Consider Product Branding Opportunities: develop opportunity list based on research and data.  | COO<br>DDPP<br>DE<br>ED<br>DM | 2002 | Ongoing |  | Use market research data to direct efforts.<br>Use current sales data to identify strongest product sales areas.<br>Coordinate with Education, Exhibit Development, Marketing<br>Budget needed. |
| 6.5.1.5 Develop wholesale capability as part of any P-O-S technology upgrade.  | COO<br>MRO<br>NA              | 2002 | 2002    |  | Coordinate with Network Administrator.<br>See 6.4.4.10  |
| NON-TRADITIONAL: Wholesale Merchandising<br>6.5.1.6 Assess needs for wholesale distribution of museum-developed product.   | MRO                           | 2003 | Ongoing |  | New staffing need: wholesale coordinator.<br>Utilize membership in Museum Store Association for potential wholesale customer list and for advertising.  |
| 6.5.1.7 Develop budget for projected sales and expenses.   | COO<br>MRO                    | 2003 | Annual  |  | Expenses to include storage, packing supplies, personnel, and marketing materials.  |

|  |           |      |        |  |                            |
|--|-----------|------|--------|--|----------------------------|
| 6.5.1.8 Develop wholesale marketing plan.                        | MRO<br>DM | 2003 | Annual |  | Coordinate with Marketing. |
| 6.5.1.9 Explore opportunity for on-line wholesale merchandising. | MRO<br>DM | 2003 | 2003   |  | Coordinate with webteam.   |

**Position Key:**

C Curator  
COO Chief Operating Officer  
DDID Deputy Director, Institutional Development  
DDPP Deputy Director, Public Programs  
DE Director of Education  
DM Director of Marketing  
ED Exhibit Developer  
MRO Manager, Retail Operations  
NA Network Administrator  
WM Website Manager

# San Diego Natural History Museum

## ACTION PLAN

**Key Result Area 6:** Enhance Financial Stability

**Planning Leader:** Ann Laddon

**Objective 6.5:** Identify and develop sources for non-traditional contributed and earned revenue (see appendix for potential products/activities)

**Dates of Action Plan:** 2002-2012

**Strategy 6.5.2:** Develop Museum Services Business Development Program

**Presented:**

**Approved:**

| Action Steps<br>(Numbered)   | Who Responsible<br>(*Lead person) | Starting Date | Scheduled Completion Date | Actual Completion Date | REMARKS (e.g., opportunities or problems uncovered; talents or weaknesses revealed; coordinated efforts required) |
|--|-----------------------------------|---------------|---------------------------|------------------------|---|
| 6.5.2.1. Research like and best practice institutions for examples of non-traditional sources of revenue           | ED                                | Aug. 2002     | Jan. 2003                 |                        | This is a crossover activity with the Leadership KRA  |
| 6.5.2.2. Compile list of potential non-traditional activities and review with senior staff.                        | ED<br>DDID<br>DDR<br>DDPP<br>COO  | Feb. 2003     | March 2003                |                        |   |
| 6.5.2.3. Short list highest potential activities and submit to cost/benefit analysis and business plan development | ED<br>COO                         | April 2003    | June 2003                 |                        | This is a cross over activity with the store and education action plans   |

|  |                          |            |                      |  |  |
|--|--------------------------|------------|----------------------|--|--|
| 6.5.2.4. Select top two activities for implementation in FY 2003/2004, and initiate programs   | ED<br>All DD's           | July 2003  | June 2004<br>Ongoing |  |  |
| 6.5.2.5. Evaluate performance and outcomes of initial test cases   | ED<br>COO                | May 2004   | June 2004            |  | This evaluation will determine whether the activities should be continued or dropped |
| 6.5.2.6. Based upon the analysis, determine next phase of opportunity and expansion for new fiscal year  | ED<br>All DD's           | July 2004  | Aug. 2004            |  |  |
| 6.5.2.7. Add one to two additional top potential programs  | ED<br>COO                | Sept. 2004 | June 2006<br>Ongoing |  |  |
| 6.5.2.8. Engage in cost benefit analysis on programs   | ED<br>All DD's           | May 2006   | July 2006            |  |  |
| 6.5.2.9. Determine value of dedicated position to develop, monitor, and expand non-traditional revenue sources, transforming them into traditional revenue sources | ED<br>DDPP<br>COO<br>DDR | May 2006   | June 2006            |  |  |
| 6.5.2.10. If indicated by analysis, develop, recruit and fill position for Museum Services   | ED<br>COO                | July 2006  | Sept. 2006           |  |  |
| 6.5.2.11 Determine appropriate growth rate for these programs, individual business plans, and performance goals  | DMS<br>(proposed)        | Oct. 2006  | Feb. 2007<br>Ongoing |  |  |

ED=Executive Director

COO= Chief Operating Officer

DDR=Deputy Director of Research

DDPP=Deputy Director of Public Programs

**Appendix:**

**Concepts for non-traditional earned include but are not limited to:**

Franchised merchandize, e.g. Valentien products, Ms. Frizzle (Stevens, Education director, proposed director of museum services)

Eco-tourism (proposed director of museum services)

Continuing teacher education units (earned, Education director)

Distance learning courses such as courses, videos, CD's, etc. (earned, Education director, proposed director of museum services)

Develop support from Mexican donors (contributed, Laddon)

Conference spouse tours w/mtg. Planners

Quail products

Traveling exhibits/regional co-op