



Markham Museum Strategic Plan

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Markham Museum

Markham, Ontario

Markham Museum Strategic Plan

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EXECUTIVE SUMMARY

1.0 PART A – BACKGROUND AND CONTEXT

1.1 Brief History of the Museum

Markham Museum is a 25-acre (10 ha) open-air museum, located at the northwest corner of Markham Rd. (Hwy. 48) and 16th Avenue in the City of Markham. The site features in the order of 30 buildings: houses, barns, sheds, a train station, a school, a general store, a church, a blacksmith shop, a harness shop, a saw mill, a cider mill, and many more. All of the historic buildings were moved to the site from other places around the Markham area with the exception of the Mount Joy School, which now serves as its main offices and administration centre. The site has been open since 1971. It is wholly owned and operated by the City of Markham, reporting through the Department of Culture and Economic Development.

Over the last few years the Museum has seen significant growth in attendance and membership thanks primarily to the efforts of staff and improved program and exhibit offerings. In particular the camp, family and children's programs have seen dramatic growth.

1.2 Purpose of this Strategic Plan

The purpose of this strategic plan is to be a guiding document for the Markham Museum over the next five years in planning its future activities on all fronts. The plan will act as a 'road map' for the Museum in directing the allocation of staff and financial resources. It sets out a purpose ('Vision') and mandate ('Mission') for the Museum, and contains a set of strategic actions and initiatives to fulfill that purpose and mandate.

1.3 Activities Undertaken

Activities undertaken by the consultants and museum staff in the course of developing this strategic plan include the following:

- Review of all background materials
- Several site tours over the course of the project
- Interviews with staff and key stakeholders (Mayor and several Councillors)
- Workshop session with the Friends of the Museum
- Presentations/workshop sessions with the Friends of the Museum Board
- Preparation and presentation of draft and final reports

2.0 PART B – KEY ISSUES AND OPPORTUNITIES IDENTIFIED

In this section we summarize the results from the interviews, workshops, and the consultant's observations. These are presented in the form of a standard **S**trengths, **W**eaknesses, **O**pportunities and **T**hreats (**SWOT**) assessment. First we describe why a SWOT approach is a useful approach to take in the

development of a strategic plan. Next the results of the SWOT itself are presented, along with some interpretation as to how that particular finding might be useful in the context of the development of a strategic plan.

3.0 PART C – THE STRATEGIC PLAN

3.1 Dual Focus of this Plan: Museum Strategy and Site Strategy

This strategic plan has been organized around the following subject areas. The first topic area is the 'Strategic Organizing Framework' (SOF): this articulates the fundamental approach that the Museum will take to all of its activities. The SOF encompasses the Vision and Mission of the organization, as well as outlining areas for activity in terms of the interrelationship between the Museum and the site; the ways in which partners will be engaged; the outreach activities supported, etc.

3.2 Strategic Organizing Framework – Proposed Vision and Mission

Any strategic plan needs to start with articulated Vision and Mission statements. A Vision Statement tells the world the fundamental purpose of the institution: why it exists, why it is unique, and what it desires to accomplish. It is an aspirational statement of future intention. The Mission Statement proclaims how the institution will act on a day-to-day basis to accomplish the Vision. Simply, the Vision Statement is about **tomorrow** and the Mission Statement is about **today**.

With this understanding in mind Museum staff with the assistance of the consultant team have developed the following Vision and Mission for the Museum.

Vision

We inspire a life-long curiosity of, pride in, and care for, the people, tangible heritage, places, lands and waterways of the City of Markham: past, present and future

Mission

We will examine Markham by engaging technologies developed and used by all human cultures to live in the natural world; agriculture and food; material culture; engineering; and environmental. We will engage science, industry, history and the arts to understand how Markham became what it is today and what its possible futures could be

3.3 Strategic Organizing Framework – Core Programs and Partnerships

Core Programs

A major theme that emerged throughout the interviews was the need for the Museum to become more focused in the core program areas. There has been past success with a focus upon the STEAM technologies of: material culture; agriculture and food; engineering; and environment. These four technology areas reflect, in part, the Museum's existing orientation in terms of its collection and programs. For example:

- 1) material culture technologies**
- 2) agriculture and food**
- 3) engineering technologies**
- 4) environmental technologies**

These four key program areas thus form the core focus that will govern future activities of the Museum in terms of collections, exhibitions, programs, etc.

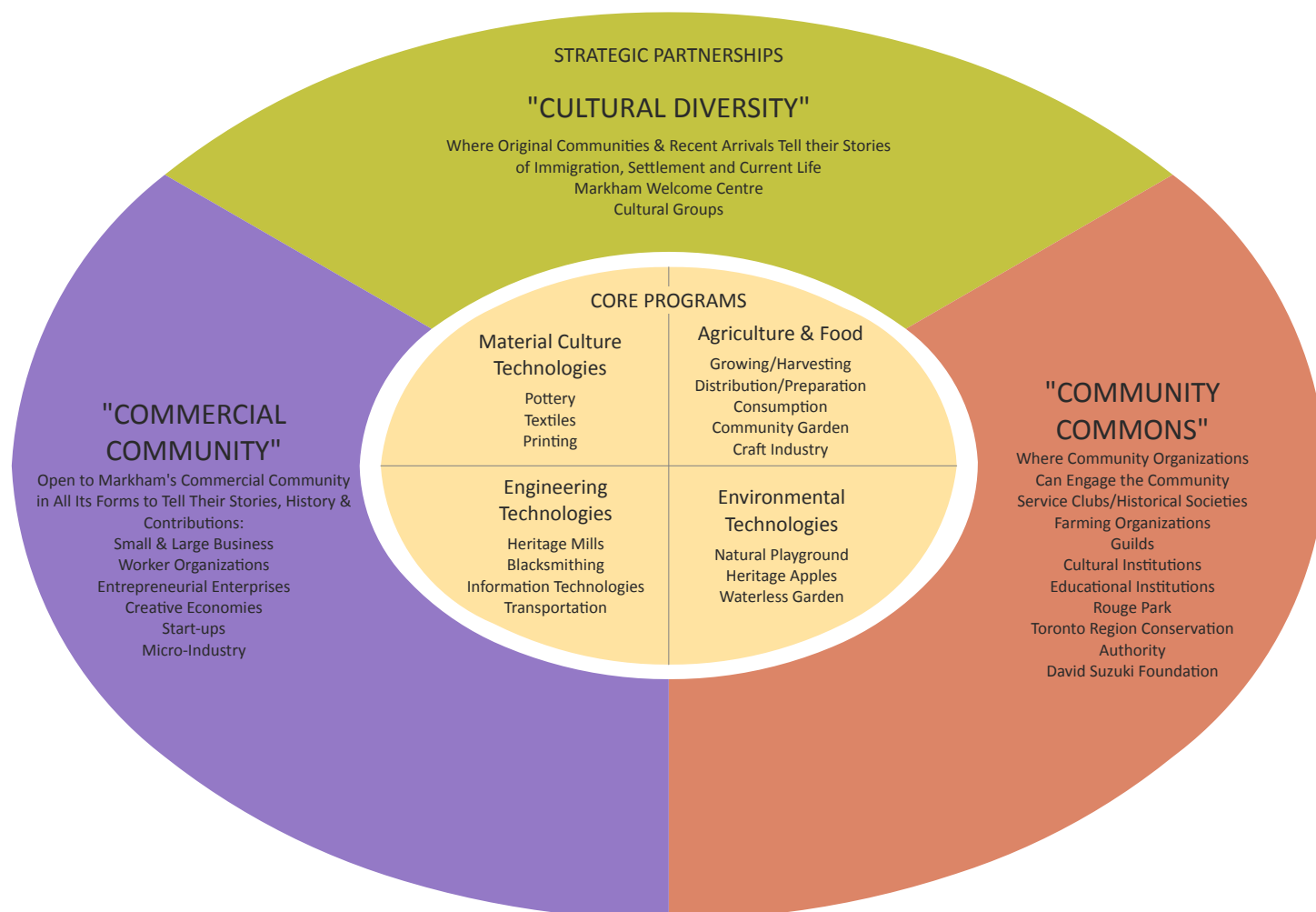
Strategic Partners

In addition to the need for a more strategic focus governing Museum activities in collections, exhibitions and programs, a companion theme heard through the interviews was the need for the Museum to do a better job of engaging potential partners. Three groups of potential partners were envisaged in this regard: 1) the diverse cultural communities that comprise Markham today; 2) business and the private sector and 3) community organizations. Through more proactive engagement with these groups the Museum could significantly increase its profile within the community and awareness of the excellent programs and opportunities the Museum has to offer.

Three groups of 'strategic partners' are envisaged, which cover the social, economic and cultural life of the community:

- 1) 'Cultural Diversity' Partners**
- 2) 'Community Commons' Partners**
- 3) 'Commercial Community' Partners**

The diagram below shows graphically how the interrelationship of core programs and strategic partners would operate.



3.4 Museum Strategy Goals and Recommendations

This section of the Report outlines the recommendations of this plan in detail. Where necessary and useful, further explanation and detail is provided for each recommendation. The first two recommendations ("Administrative / Procedural") simply relate to the formal recognition and adoption of the strategy, and a commitment to implementing it by virtue of reviewing progress on an annual basis.

A) Administrative / Procedural Recommendations

Recommendation 1) Adopt Strategic Plan:

Municipal Council should adopt this plan in principle and refer it to the Department of Culture and Economic Development staff for advice on implementation.

Recommendation 2) Outcomes Orientation:

An outcomes scorecard for this plan should be developed by staff (following suggestions contained in this Report) and used to measure achievements and targets met.

B) Strategic Organizing Framework

Recommendation 3) Adopt Vision and Mission Statements:

Adopt the revised Vision and Mission statements prepared in the context of this strategic plan by Museum management, staff and the consultant team.

Recommendation 4) Articulation of Strategic Organizing Framework and Partnership Strategy:

The SOF outlined earlier should be adopted as the driving thematic approach informing collections, exhibitions, programs, and events. It will also drive the development of active partnerships with the ‘Cultural Diversity’, ‘Community Commons’ and ‘Commercial Community’ organizations referred to above. A Partnership Development orientation should be adopted by the Museum so that every program and exhibit would be aligned with a community sponsor (a cultural community, corporate sponsorship, or community organization).

Recommendation 5) Alignment of Permanent Exhibit Program with Key Areas of Focus:

Over time, the program for permanent exhibits should continue to be redeveloped to align with the Strategic Organizing Framework.

Recommendation 6) Articulation of Revised Collections Policy:

The collections policy should be revised to reflect the Strategic Organizing Framework outlined above including a detailed deaccessioning strategy.

C) Site and Master Plan Development Recommendations

Recommendation 7) Develop Museum Master Plan:

A Museum and Site Master Plan should be prepared that reflects the decisions made regarding the use of the building and the site to extend museum programming as well as the specific recommendations regarding buildings (e.g. the Mount Joy School, the Exhibit / Collections building, etc.). As an integral component of the Museum Master Plan, a Site Interpretive Plan is recommended, that would provide orientation and examine the various buildings and structures on the site from the perspective of their ability to help interpret the Strategic Organizing Framework (as well as provide a positive visitor experience).

Recommendation 7a) Expand the Current Long-Term Programs / Exhibitions Plan to Include Active Partnership Involvement:

A long-term plan (e.g. 3-5 years) be developed for both programs and exhibitions that includes active partnerships – also aligned with the SOF.

Recommendation 7b) Review the Importance and/or Relevance of All Existing Structures on the Site:

All existing structures on the site, including the historic buildings, should be reviewed as to their relevance to the SOF and/or ongoing Museum operations. Those structures deemed no longer relevant, important or useful to ongoing Museum programs and operation or are unsafe should be relocated or removed from the site.

Recommendation 7c) More Active Use of the Site to Extend Museum Programming:

The use of the site to extend the programming and interpretive elements of the Museum focus should be pursued.

Recommendation 7d) More Collection Storage:

More and better storage space is required to accommodate collections that remain housed in poor conditions around the site and are currently at risk. Over the long-term these collections should be accommodated in an expanded Exhibit/Collection Building.

Recommendation 7e) Exhibit Storage:

Space is also needed to house the Museum's exhibit storage requirement. An expanded Exhibit/Collection Building could also meet this requirement.

Recommendation 7f) Consolidation of Staff into Exhibit/Collection Building:

Staff should be consolidated into the Exhibit/Collection Building, which will likely need to be expanded to accommodate them as well as provide additional space for exhibit storage and collections.

Recommendation 7g) Repurpose Mount Joy School for Programming:

The freed-up Mount Joy School should be used as program space. It could also be positioned as rental space for outside organizations.

Recommendation 7h) Expanded Gift Shop Operation:

The current gift shop operation is quite small and reportedly generates little for the Museum in terms of interest or gross revenue. It should be repositioned to become a more compelling part of the overall visitor experience.

Recommendation 7i) Review the Long-Term Use of the South Gallery in the Exhibit/Collection Building:

As a result of its strategic location near the entrance to the Museum and site the use of the South Gallery should be examined in the context of all the space use demands the Museum is facing.

Recommendation 7j) Greater Rentals Focus:

The Museum should continue to actively promote rentals of the site and buildings. Rentals of currently underutilized buildings and areas on site should be explored more aggressively at non-peak times such as evenings and weekdays.

D) Operations Recommendations

Recommendation 8) Expand Range of Activities and Events:

The interviews revealed a strong desire for new and expanded programs to serve the needs of the diverse community (e.g. 'Economics Camp').

Recommendation 8a) Restructure Tour Offerings:

The existing general tours should be discontinued. More specific thematic tours aligned with the SOF should be offered.

Recommendation 8b) Expand School Group Tours:

School group tours are of course actively offered at the Museum, and the Strategic Organizing Framework provides a mechanism for the Museum to become even more relevant in offering these (particularly as it fits so well with the STEM – and STEAM – educational approach).

Recommendation 9) Create Strategic Marketing Plan:

A marketing plan should be developed for the Museum, identifying target markets, key messages marketing media, budget, etc.

Recommendation 10) Explore a New Museum Name:

On several occasions during the interviews it was suggested that a more dynamic and interesting name be chosen for the Markham Museum.

Recommendation 11) Explore More Active Membership Development Program:

At the moment the membership program does not appear to be actively supported. However, this can be a key element of an audience development, and ultimately, fundraising strategy.

Recommendation 12) Create Fundraising / Sponsorship Strategy:

A Fundraising & Sponsorship strategy should be developed by the Museum. With the exciting new direction implied by the SOF and the renewed partnership orientation, there is an opportunity to take a more active approach to fundraising development.

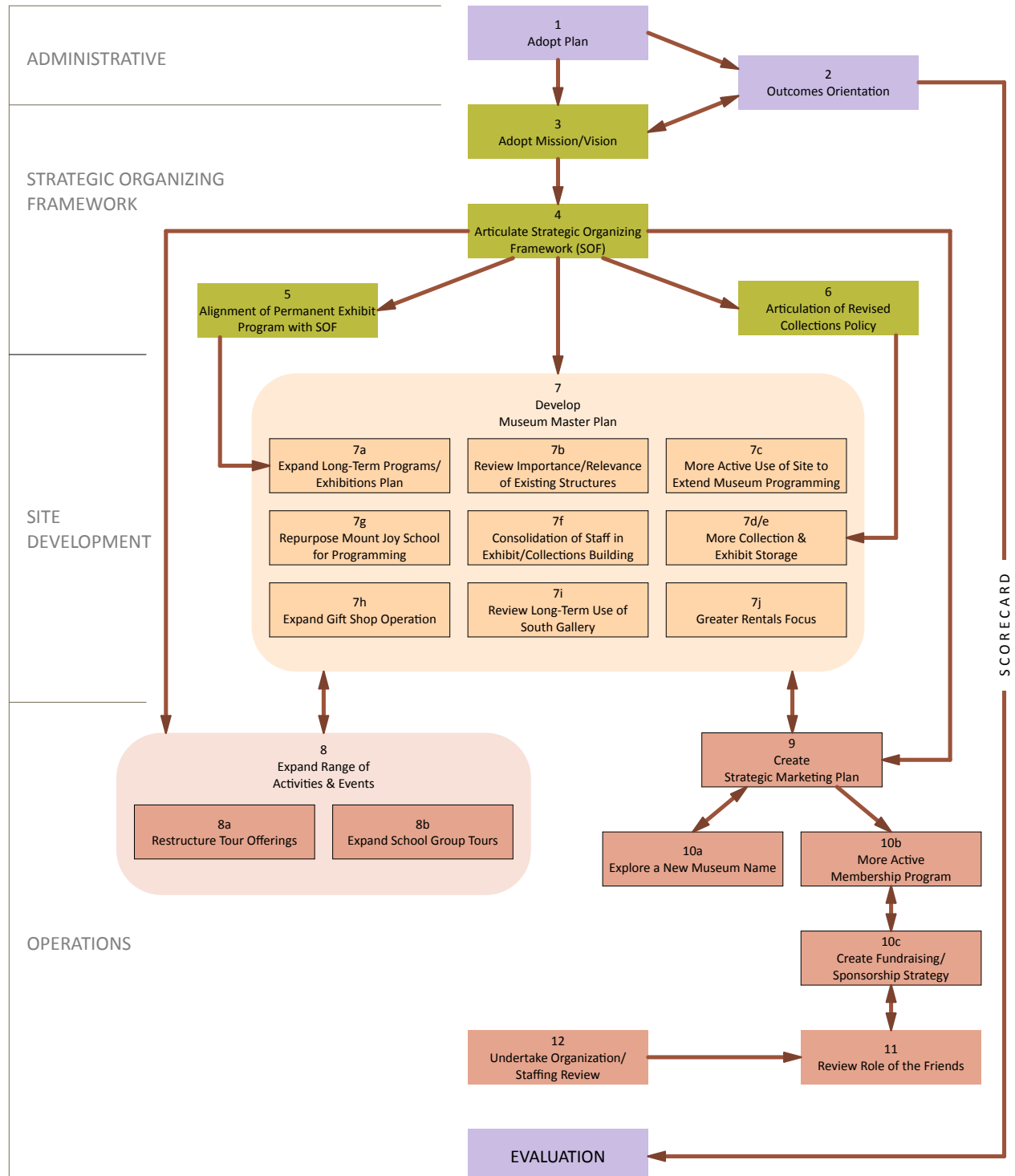
Recommendation 13) Strategic Plan for the Friends of the Museum:

It is recommended that the Friends of the Markham Museum prepare their own strategic plan in light of their potential to assist in the implementation of SOF.

Recommendation 14) Undertake Organization and Staffing Review:

Several of the recommendations outlined here imply changes to the existing organization and staffing structure of the Museum. A subsequent organization study should be undertaken.

Following is a graphic illustrating the organization of the proposed recommendations. For the timeline for implementing the recommendations refer to the following page.



Next Steps: Timeline for Study Recommendations

Recommendation	Immediate 2017	Short-Term 2018 - 2019	Medium-Term 2020 - 2021	Long-Term 2022 - 2026+
Recommendation 1) Adopt Strategic Plan				
Recommendation 2) Outcomes Orientation				
Recommendation 3) Adopt Vision and Mission Statements				
Recommendation 4) Articulation of Strategic Organizing Framework and Partnership Strategy				
Recommendation 8a) Restructure Tour Offerings				
Recommendation 8b) Expand School Group Tours				
Recommendation 6) Articulation of Revised Collections Policy				
Recommendation 9) Create Strategic Marketing Plan				
Recommendation 10) Explore a New Museum Name				
Recommendation 7j) Greater Rentals Focus				
Recommendation 8) Expand Range of Activities and Events				
Recommendation 5) Alignment of Permanent Exhibit Program with Key Areas of Focus				
Recommendation 11) Explore More Active Membership Development Program				
Recommendation 12) Create Fundraising / Sponsorship Strategy				
Recommendation 7a) Expand the Current Long-Term Programs / Exhibitions Plan to Include Active Partnership Involvement				
Recommendation 7) Develop Museum Master Plan				
Recommendation 7b) Review the Importance and/or Relevance of all Existing Structures on Site				
Recommendation 7c) More Active Use of the Site to Extend Museum Programming				
Recommendation 7d) More Collection Storage				
Recommendation 7e) Exhibit Storage				
Recommendation 7f) Consolidation of Staff into Exhibit/Collection Building				
Recommendation 7g) Repurpose Mount Joy School for Programming				
Recommendation 7h) Expanded Gift Shop Operation				
Recommendation 7i) Review the Long-Term Use of the South Gallery in the Exhibit/Collection Building				
Recommendation 13) Strategic Plan for the Friends of the Museum				
Recommendation 14) Undertake Organization and Staffing Review				

1.0 PART A – BACKGROUND AND CONTEXT

1.1 Brief History of the Museum

Markham Museum (in the past known as *The Markham District Historical Museum* and later *Markham Museum & Historic Village*) is a 25-acre (10 ha) open-air museum, located at the northwest corner of Markham Rd. (Hwy. 48) and 16th Avenue in the City of Markham. The site features in the order of 30 buildings: houses, barns, sheds, a train station, a school, a general store, a church, a blacksmith shop, a harness shop, a saw mill, a cider mill, and many more. All of the historic buildings were moved to the site from other places around the Markham area with the exception of the Mount Joy School, which now serves as its main offices and administration centre. The site has been open since 1971. It is wholly owned and operated by the City of Markham, reporting through the Department of Culture and Economic Development.

There is a 'Friends of the Museum' foundation whose role is primarily to become involved in various fund-raising activities. They do not have any formal advisory or governance function. The Friends of the Museum board is made up of 11 directors including the Mayor and up to two City Councillors.

Markham Museum is open year-round to visitors, event rentals and researchers. A wide variety of programs and services are provided at the Museum, including:

- Pre-school and children's programs
- Teen programs
- Family programs
- Adult programs
- Summer camp program

As well, the site is available for rentals for weddings, birthday parties, corporate events, etc.

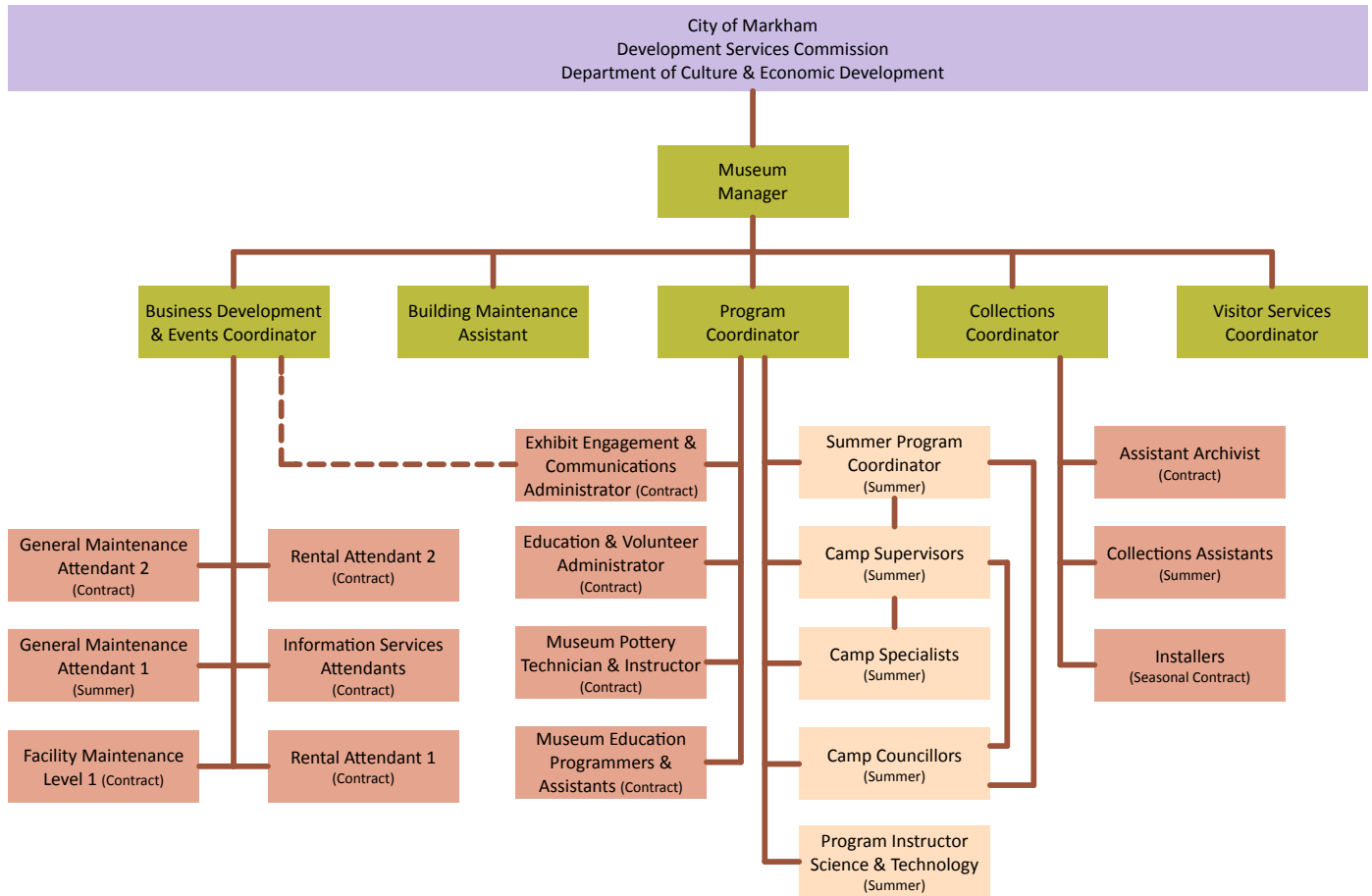
The Museum puts on four 'signature' events each year, these are:

- 1) Applefest, in September
- 2) Scaryfest, at Halloween
- 3) Winterfest, on Family Day
- 4) March Break

Staffing

Staffing at the Museum fluctuates seasonally. From October to May in 2016 the Museum employed between 45 to 50 staff, from June to September it employed around 90 staff. Some of these were full-time positions while others were part-time.

The organization chart for the Museum is shown below:



As implied by the chart above, the Museum operation employs 6 full time positions.

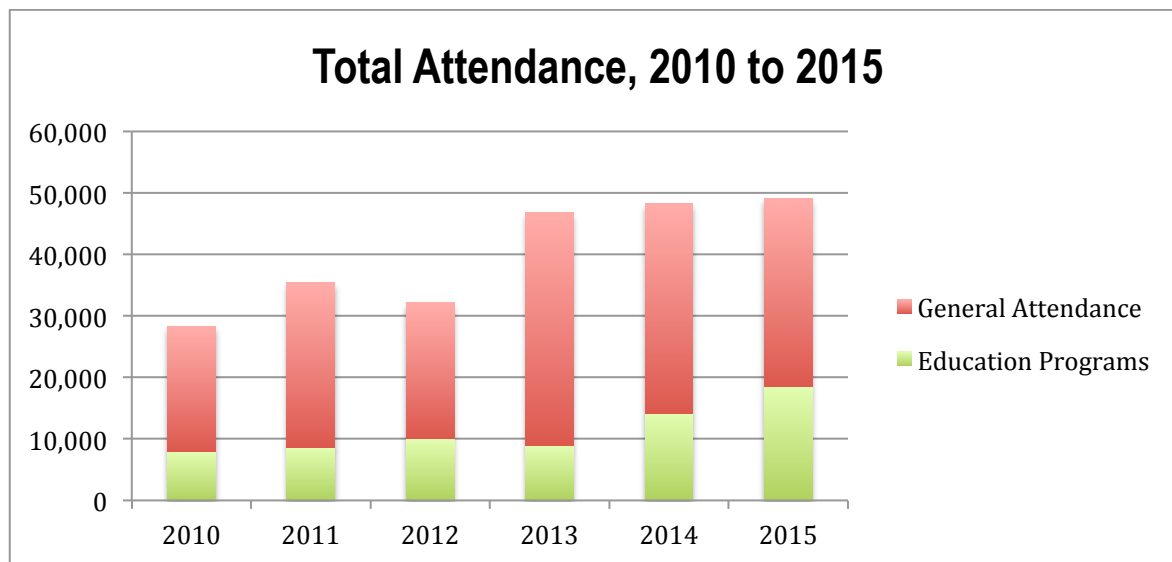
Budget

The following table shows the 2016 budget for the Markham Museum, by program area (according to the City's standard budgeting process). As the table shows the total overall budget is just over \$1.4 million of which approximately 75% is staffing costs. The annual Museum program generates nearly \$646 thousand in revenues (approximately 45% of costs). The net annual cost is approximately \$800 thousand or \$2.66 per citizen of Markham.

2016 Operating Budget

Program Area	Staffing (Personnel) Costs	Other (Non-Personnel) Costs	Revenues	Net
Curatorial Services	\$168,685	\$58,340	(\$76,418)	\$150,607
Departmental Support	\$319,860	\$162,127	(\$43,985)	\$438,002
Rentals / Events	\$96,654	\$24,846	(\$87,987)	\$33,513
Site Maintenance	\$117,702	\$79,198	(\$9,374)	\$187,526
Visitor Experience	\$385,620	\$32,916	(\$428,189)	(\$9,653)
TOTAL	\$1,088,521	\$357,427	(\$645,953)	\$799,995

Some key performance metrics of the operation are shown below:



As the graph shows, overall growth in the audience (attendance) in 2015 was just under 50,000, fuelled in large part by the very significant growth in pre-booked programs. In particular the camp and family/children's programs showed dramatic growth. 2016 appears to be on-track to meet or exceed this level.

The Museum also has a very strong Volunteer Program. Over the last three years there have been as many as 18,000 volunteers in a single year. Over the last couple of years the program has been integrated into the city-wide system and is expected to continue to grow. The volunteers are particularly important to the ongoing success of the Museum's operations. The program also plays an important role in attracting new audiences, as volunteers tend to bring their own families and friends to the Museum.

1.2 Purpose of this Strategic Plan

The purpose of this strategic plan is to be a guiding document for the Markham Museum over the next five years in planning its future activities on all fronts. The plan will act as a 'road map' for the Museum in directing the allocation of staff and financial resources. It sets out a purpose ('Vision') and mandate ('Mission') for the Museum, and contains a set of strategic actions and initiatives to fulfill that purpose and mandate.

For some time there has been a sense among stakeholders that the Museum, while providing excellent exhibits, programs, and services to Markham residents, lacks an overall 'organizing idea' or 'framework'. This is evident by the somewhat random-appearing distribution of buildings on the site; collections that do not comprehensively inform an integrated story of the community; and programs and exhibits that do not necessarily build momentum to develop a continuing audience. As well, there is general sense that the Museum could be much more active in the formation of partnerships with community organizations, cultural groups and the business community, for whom they could be an invaluable resource in helping

them to tell their stories to residents and visitors. In short there is a sense that the Museum has tremendous untapped potential to be an even more effective force in helping to 'explain Markham', and thus to help foster community pride and a sense of belonging.

This strategic plan provides a guide for the Museum to embrace this direction. It first develops a Vision, Mission and 'Strategic Organizing Framework' (SOF) which provide the underpinning for the strategy itself. This gives the Museum its unique role and function within the life of the municipality, and sets the stage for the strategy developed here.

1.3 Activities Undertaken

Activities undertaken by the consultants and museum staff in the course of developing this strategic plan include the following:

- Review of all background materials
- Several site tours over the course of the project
- Interviews with staff and key stakeholders (Mayor and several Councillors)
- Workshop session with the Friends of the Museum
- Presentations/workshop sessions with the Friends of the Museum Board
- Preparation and presentation of draft and final reports

1.4 Caveats and Cautions

There are a number of key definitions, cautions and assumptions that should be kept in mind when reviewing this Report. These are:

- 1) **Lack of Comparable Benchmarks:** Early on in the development of this strategy, it became apparent that the 'Strategic Operating Framework' (SOF) that is the core of this plan was a highly innovative approach for a community museum, and that explicit comparisons with similar organizations were not going to be easy or even possible. This is based in large part on the consultant's experience in undertaking strategic planning for community museums elsewhere, as well as the opinion of Museum staff who have been working in the field for many years.
- 2) **This is a Strategic Plan, not a Master Plan:** A strategic plan articulates a Vision and a Mission for an organization and outlines a set of actions and initiatives that it should take to guide it towards achievement of that Vision. It enables an organization to allocate resources, human as well as financial, to the accomplishment of the Vision. In contrast, a Master Plan is a physical expression of land use, building placement and connections between activities and sites. It is in a sense, a three-dimensional expression of the physical aspects of a strategic plan. But they are not equivalent. The preferred order of planning is that first, a Strategic Plan will be created and then, next, a Master Plan will be one of the ways through which that Strategic Plan is realized. (The classical expression of this is 'form follows function'.) As will be seen, one of the recommendations resulting from this strategic plan is that a Master Plan be developed in due course.

- 3) **This is a not a Business Plan:** Following the logic of the point above, this is also not a Business Plan. The implementation section of the Report does describe some costs and revenues associated with the strategic recommendations, but these have not been integrated into a complete budget projection. Nor has the impact of the strategy upon attendance and revenues been calculated explicitly.
- 4) **No Independent Market Analysis Undertaken:** This plan is predicated upon a general assumption that the Museum will be developing partnerships with a wide range of community groups and organizations. This assumption, while reasonable, has not been specifically tested with those potential partners over the course of this project, due to time and budget limitations. The implementation of the Strategic Plan itself will require that the Museum initiate discussions with these organizations as it is implemented.

1.5 Community Museum Context: Recent OMA Strategic Plan

It is noteworthy that the Ontario Museum Association (OMA), of which the Markham Museum is a member, has recently undertaken a strategic assessment of the role and function of community museums in Ontario. (The Manager of the Markham Museum was part of the Task Force that undertook this work). The work of the Task Force resulted in a Report, **Looking Ahead**, which outlines the recommended role of community museums across the province as including the following objectives:

- Better reflect diversity of province (by this it is meant that collectively, community museums will reflect the diversity of the province, by each reflecting the diversity of their own area)
- Contribute to economic development
- Be welcoming, innovative, inclusive
- Provide relevant & meaningful collections
- Strengthen partnerships with educators
- Proactively engage with the public
- Collaborate with other community organizations
- Operate efficiently & effectively
- Embrace self-assessment
- Maintain positive intergovernmental relations

In the view of the consultants, the Strategic Plan that is developed here, embraces all 10 of these points.

2.0 PART B – KEY ISSUES AND OPPORTUNITIES IDENTIFIED

In this section we summarize the results from the interviews, workshops, and the consultant's observations. These are presented in the form of a standard **S**trengths, **W**eaknesses, **O**pportunities and **T**hreats (**SWOT**) assessment. First we describe why a SWOT approach is a useful approach to take in the development of a strategic plan. Next the results of the SWOT itself are presented, along with some interpretation as to how that particular finding might be useful in the context of the development of a strategic plan.

2.1 SWOT Assessment Framework as a Basis for a Strategic Plan

A SWOT assessment is a powerful way to summarize the various attributes and characteristics of a museum or other cultural operation in order to understand what is working well (and needs to be retained and expanded), and what is not working well (and thus needs to be fixed). This latter category in particular, represents areas where service improvements can be made.

For the development of a strategic plan, strengths, weaknesses, opportunities and threats are treated somewhat differently, and lead to recommendations in different ways. The following table shows how each of these is defined, and how it may lead to different types of strategic recommendations:

SWOT ASSESSMENT	DEFINITION	IMPORTANCE IN STRATEGIC PLANNING
STRENGTHS	Current or present factors that relate to positive aspects of current service provision that are utilized and appreciated by the public	These are elements that a strategic plan needs to ensure will be maintained and further developed to the extent possible
WEAKNESSES	Current / present factors that relate to negative aspects of current service provision that could be improved or eliminated They may relate to inefficiencies in service provision, or lack of utilization of programs and services on the part of the public	These are elements that a strategic plan needs to recognize and either eliminate or improve, as the situation requires
OPPORTUNITIES	These are new possibilities that lie on the horizon to provide additional or innovative services or programs in order to respond to changing demand	Note that while improving existing attributes or characteristics that may have some inherent weakness are also 'opportunities', a key focus here is upon new and different types of services, thus representing opportunities to increase the level of service to the public overall, or to increase overall usage of the museum or site
THREATS	These represent potential developments that may or may not occur, but which, if they do, have the effect of reducing the level of service to the public overall, usually through reducing the level of resources (human and financial) available to the system	A strategic plan should take potential threats into account, and undertake contingency planning or risk assessment as required

2.2 “STRENGTHS” of the Museum and Strategic Actions Implied

Factor	Consultant's Assessment
Existence of the Museum as a symbol of community pride	The very existence of the Museum demonstrates to residents and visitors alike that Markham takes pride in its history and heritage, and deems it important to educate people in these aspects. Moreover, the impression of the Museum, incorporating modern and historical elements (e.g. the education centre as well as the historic buildings) shows that the City adopts a 'past, present, future' approach to how it regards its legacy. This is strategically a very smart and responsible position for a municipality to take in terms of both providing services to residents but also in messaging the kind of community that Markham is to the outside world.
Capable & professional leadership & diligent and hard working staff	Again, this is a very strong foundation to build upon. The fact that this is recognized externally by stakeholders and the general public creates a level of trust and respect for what the Museum does in the community, and thus provides a solid basis for this plan. And, while this was mentioned as a <i>perception</i> of the community through the interview process, in the consultant's opinion this reflects the <i>reality</i> of the situation in terms of dedicated and hardworking management and staff.
Engaging and relevant programs as shown by rising attendance and utilization	The truth of this perception is shown by rising attendance levels and program participation metrics. Again, this provides a very solid basis for moving forward with this strategic plan. Implications are to continue to grow successful programs and to ensure that staff and potential partners continue to be engaged in program development. Ensure that adequate and appropriate facilities are available for programs.
Prominent and visible location	This is another key strength that is widely recognized. The location is on one of the higher traffic count intersections in the municipality, and is seen by thousands of passers-by each day. Strategic implications will be to retain the current location and optimize the benefits of location and pass-by traffic through signage, activities visible from the road, etc.
Room on site to expand and have multiple activities on-going	The fact that there is ample space on the site to accommodate potential future facilities, activities and events was also a perceived strength or advantage and was recognized by many as such. While this is certainly true, the downside of this (as will be seen in the discussion of weaknesses) is that the site can be seen as too large, somewhat disorganized and not strategically coherent. The implication of this is to ensure that the plan optimizes the use of the full site for strategic purpose.
Markham community itself: growing, culturally diverse, dynamic	This contextual strength of Markham as a growing and thriving community was mentioned by most of the interviewees, and certainly this perception is correct when one looks at its recent track record of growth. (As of the 2016 Census Markham grew at a rate of 9% over the 2011 - 2016 period, nearly double the 4.6% growth seen for the province overall.) Strategic implications are to ensure that part of the story told by the Museum recognizes the growing and dynamic nature of the community, and to ensure that the Museum focuses upon the present and the future as much as the past.

2.3 “WEAKNESSES” of the Museum and Strategic Actions Implied

Factor	Consultant's Assessment
Lack of strategic organizing framework (SOF)	A key concern mentioned by several interviewees, and a weakness noticed as well by the consultants, is the lack of a strong strategic organizing framework (SOF) for the Museum. In other words there is not an evident organizing principle(s) or theme(s) underlying the collections, programs, layout of buildings on the site, etc. To some extent this reflects a lack of specific and clear direction in the Vision and Mission Statements as well as a the lack of a strong organizing statement itself. Such an organizing framework will be a fundamental aspect to future planning at the Museum and needs to be a key part of this strategic plan.
Permanent Exhibitions Hall in need of refreshment / Some buildings on site in poor condition (e.g. Housser House) / Site not well organized / integrated / understandable	There were three major ways in which the physical organization of the site or the use of space within buildings demonstrated the above-mentioned lack of an SOF that came up in the interview process. These were also noted by the consultants who in essence agree with the perceptions raised. The three areas are: 1) the permanent exhibitions hall, which is in need of an overall 'refresh' and should feature the themes of the SOF as well as artifacts that illustrate those themes; 2) the fact that the placement of buildings on the site seems haphazard, and not according to any logic or strategy, and 3) the fact that some buildings on the site are in poor condition (which underscores the impression of a lack of underlying logic or intentionality to the site's configuration).
Site at times underutilized	This perception was raised several times though the interview process. While there was an acknowledgement that at certain peak periods the site was very intensively occupied (e.g. the four signature events; the camps) there was a perception that at other times the site was quite underutilized. In our view, while this is true, it is not a matter for undue concern. This is true of virtually any museum anywhere - there are always peak times that are off-set by other times of low utilization and attendance. In our view it simply points to opportunity areas for programs and services in non-peak times. The other aspect of this, not mentioned very frequently in the interview process but something that the consultants did look into nonetheless, was whether there appeared to be any capacity constraints at play that might inhibit the expansion potential for existing signature events. While this may be true of parking, there does not appear to be any such constraint with respect to the site itself.
Some collections at risk due to improper storage	This issue was raised by some staff, and is one with which the consultants agree. The strategy should look for opportunities to better house the collections at risk including renting suitable space where that may be necessary. Also, deaccessioning material that is no longer relevant to the SOF should be undertaken.

2.3 “WEAKNESSES” (cont’d)

Factor	Consultant's Assessment
Separation of staff in two unconnected buildings is sub-optimal	This issue was mentioned several times by staff and is certainly one with which the consultants agree. Ideally, in any museum operations staff are housed in a manner proximate to one another in order to facilitate ideas, information exchange and just basic communications. While this is not practical in all museums, the possibility to do this should at least be considered in the context of this strategic plan. Accordingly, the strategic plan developed here should examine strategic options to bring staff together.
Some lack of integration / coordination of Museum events and other community activities (e.g. with cultural partners)	This too was mentioned by staff and some external stakeholders. While true, in the view of the consultants this is likely more of an opportunity than a present weakness and should be embraced as such in the development of the strategic plan.
General admission tours: not well attended; disconnected from key activities	This perception is certainly true and points to a need (or opportunity) to better align tours to the themes of the SOF. Tours could be specifically designed to illustrate one or more of the themes of the SOF, and would thereby be more focused, meaningful and likely engender a larger audience. The strategic plan must embrace this possibility.
Reportedly low levels of awareness of programs and services offered; even of Museum overall	This factor was mentioned as a weakness by nearly everybody interviewed. While not a surprise from the consultant's perspective (awareness of community museums in municipalities is almost universally low) it does point to the need to more aggressively market and promote the museum to the local community through general marketing activities, public relations activities, program development and events. As well, appropriate market research should also be undertaken to determine levels of awareness, interest, etc. These are aspects that must be considered in the strategic plan.

2.4 “OPPORTUNITIES” Facing the Museum and Strategic Actions Implied

Factor	Consultant's Assessment
Improve overall site layout and organization – aligned with strategic organizing framework, and in a way to embrace Markham’s diverse community	The most significant and over-arching opportunity seen throughout this strategic plan is to reorganize the museum offering – everything from collections to programs to events to the organization of the site – according to the SOF mentioned earlier. An SOF that reflects the full scope and diversity of the entire community will necessarily require reaching out to and involving a diverse range of potential partners including ethno-cultural groups, the business community, community groups and service clubs, etc. The overall strategy should be built around this central organizing idea, and many of the subsequent opportunities mentioned will be specific expressions of it.

2.4 “OPPORTUNITIES” (cont’d)

Factor	Consultant's Assessment
Development / freeing up more program space	A theme mentioned throughout the interviews, and one that is very much aligned with the notion of involving the community to a greater extent through the auspices of an SOF, is to develop more space where active programming can occur. This would not just involve more space overall, but space where appropriate facilities for flexible programming could occur. Also the space should be well located with respect to access, visibility, etc.
More active rentals program (<i>as audience development strategy primarily; revenue generation secondarily</i>)	‘Investigate more rental opportunities’ was a potential strategy that was mentioned frequently throughout the interview process. In many cases this was seen fundamentally as a revenue generation strategy. While we agree with this as an opportunity area, we do so with two caveats: first, in our view rentals to corporate and community organizations and the general public should be undertaken primarily as a means of exposing new and different audiences to what the museum has to offer, and only secondarily as a revenue generation strategy. (When revenue generation trumps all, this can over time subvert the basic purpose of the museum, where it becomes an event venue first and a museum second.) The second caveat we would place on this that there are certain times at present when the museum is at capacity in terms of its ability to sustain additional rentals. Accordingly, further rentals should be pursued for non-peak times, and from organizations for whom those non-peak times work best (e.g. renting to corporate organizations on weekday evenings). In sum, while additional rentals are an opportunity areas, they need to be pursued carefully and at those times that are optimal for the organization overall.
Collections policy oriented / aligned with SOF	The Collections Policy should be reviewed (currently underway) and refined in a manner to be fully aligned with and reflective of the SOF. This should include provision for deaccessioning, as we understand that there are likely those items in the collection that will not optimally suit the requirements of the SOF – moreover (as pointed out before in the ‘weaknesses’ section) there are at present issues with respect to storage space.
Improve collections storage	This basic opportunity is to address storage needs of collection: now and into the future. It will clearly follow directly from the development of the collections policy, as previously mentioned.
Better integration of staff space and functions	As was mentioned in the ‘weaknesses’ section, a key issue is with the division of staff into two blocks, in two separate buildings, which severely limits the interaction between individuals, and inhibits the creative exchange of ideas. The strategy should accordingly seek ways to bring staff together on a more permanent basis.

2.5 “THREATS” Facing the Museum and Strategic Actions Implied

Factor	Consultant's Assessment
Uncertainties, continuing community / Council support	While this was mentioned as a potential risk by some, we frankly see it as quite low in terms of threat value. The fact that Council has sanctioned the preparation of this strategic plan, that the Mayor and several Councillors have participated in its development, and there is a general sense from elected representatives and municipal staff alike that the Museum is a positive entity in the community and must continue to become an even stronger asset, all point against this being a real possibility. This is a threat that is more academic than real. Of course, this does not obviate the need for accountability, and for reporting back to Council and the general community the performance against outcome measures, etc.
Competition for time of potential Museum-goers by other activities/attractions	This is a very real threat being felt by not just museums, but by cultural organizations of all types. The proliferation of other entertainment options, many home-based but many also at other venues, potentially takes away time that individuals might otherwise use to visit museums. To some extent this may be compensated for by technology (individuals consuming museum content through apps, on-line content delivery, web sites, the Virtual Museum) but it still potentially depresses actual visits to the institutions. And, if anything, these threats will become even more significant into the future, with the increasing pace of technology making even more options available. The only strategic solution is the time-honored one: ensure that programs and services are reflective of community interests, needs and desires, and are seen to be relevant.

3.0 PART C – THE STRATEGIC PLAN

3.1 Dual Focus of this Plan: Museum Strategy and Site Strategy

This strategic plan has been organized around the following subject areas. The first topic area is the 'Strategic Organizing Framework' (SOF): this articulates the fundamental approach that the Museum will take to all of its activities. The SOF encompasses the Vision and Mission of the organization, as well as outlining areas for activity in terms of the interrelationship between the Museum and the site; the ways in which partners will be engaged; the outreach activities supported, etc.

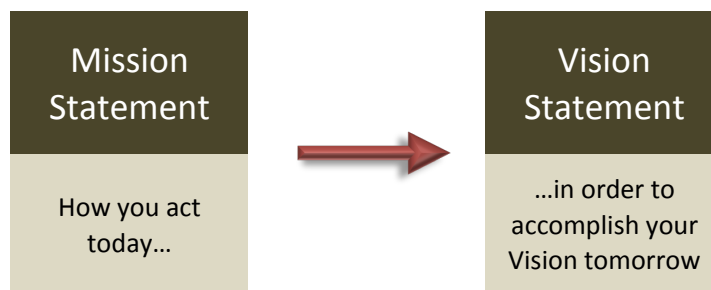
After outlining the SOF, the strategic plan addresses more traditional aspects of museum operation: collections, exhibits, programs, and so on.

Accordingly, the subject areas addressed in this strategic plan are as follows:

1. Develop and Adopt Strategic Organizing Framework
2. Collections and Research
3. Permanent Exhibits
4. Programs & Exhibitions
5. Site Consolidation & Integration
6. Partnership Development
7. Marketing & Fundraising
8. Organization & Staffing

3.2 Strategic Organizing Framework – Proposed Vision and Mission

Any strategic plan needs to start with articulated Vision and Mission statements. A Vision Statement tells the world the fundamental purpose of the institution: why it exists, why it is unique, and what it desires to accomplish. It is an aspirational statement of future intention. The Mission Statement proclaims how the institution will act on a day-to-day basis to accomplish the Vision. Simply, the Vision Statement is about **tomorrow** and the Mission Statement is about **today**.



The value of having cogent Vision and Mission statements is that they are statements of intentionality that will guide the direction and allocation of resources such as staff time, financial resources, partnerships developed, etc. While this is of course true for the strategic plan itself, Mission and Vision statements are perhaps even more useful in future situations, when unexpected opportunities or challenges arise. No strategic plan can entirely predict all future contingencies, and so having well-thought out and meaningful Mission and Vision Statements in place as a guide for decision-making is essential.

As well, Mission and Vision Statements are ways of creating identity not just for decision-makers such as a Board, management and staff, but also send a key message to stakeholders, partners, funders and the general public about the purpose and intent of the institution.

With this understanding in mind Museum staff with the assistance of the consultant team have developed the following Vision and Mission for the Museum. (In the opinion of the consultants, these statements do what 'good' Vision and Mission statements do: 1) they reflect the unique purpose and operation of the organization, which differentiates it and spells out why it exists; 2) they suggest intentionality and a proactive stance in how the organization intends to deal with its community and reflect itself to the wider world; and 3) they are relatively short and easy to remember.)

In the discussion below, both the Vision and Mission statements are 'deconstructed' in terms of the meaning and significance of the key statements.

Vision

We inspire a life-long curiosity of, pride in, and care for, the people, tangible heritage, places, lands and waterways of the City of Markham: past, present and future

There are several aspects of this Vision statement that are worth noting:

"life-long curiosity" – emphasizes that the Museum will be for everyone, all ages

"pride in, and care for" – suggests that the Museum has a role in creating greater awareness and interest in Markham's history and future – by extension, it could be thought that people who care for their community are better citizens and more likely to become engaged in civic life through volunteerism, becoming involved in civic events and activities, etc.

"people, tangible heritage, places, lands and waterways" – suggests that the scope of the Museum is about creating a greater awareness of the history of Markham and about the integration of the landscape and the people (including the need for environmental sustainability): the intersection of geography and culture – how the land (and waterways) have influenced the people, and how the people have in turn influenced the landscape

“past, present and future” – declares that the Museum is not just about the past, but sees the past as the gateway to the present, just as the present is the gateway to the future – the Museum takes the ‘long view’

Turning to the Mission, management and staff have articulated the following:

Mission

We will examine Markham by engaging technologies developed and used by all human cultures to live in the natural world; agriculture and food; material culture; engineering; and environmental. We will engage science, industry, history and the arts to understand how Markham became what it is today and what its possible futures could be

Similarly, there are several aspects of this Mission statement that are worth noting:

“engaging technologies developed and used by all human cultures” – this clause recognizes that each of the many diverse cultural communities comprising Markham today (and indeed, into the future) employ the same fundamental material technologies to exist and flourish – the examination of similarities and differences in these technologies can be a common glue that brings people together

“agriculture and food; material culture; engineering; and environmental” – articulates the four core material technologies that will be a key focus for collections, exhibitions, programs – this is part of what will make the Markham Museum unique and different from other community museums

“engage science, industry, history and the arts” – suggests a perfect fit between the collections, exhibitions and programs offered by the Museum and the ‘STEAM’ (Science, Technology, Engineering, Arts, Mathematics) emphasis of educational curriculums at all levels

“understand how Markham became what we are today and possible futures” – this echoes the statement found in the Vision Statement: that the Museum is not just about the past, but need to be seen to be relevant to today and tomorrow’

These Vision and Mission Statements have been foundational in the development of the strategy itself, which is, in a sense, the detailing of how the Mission is to be undertaken, in order to ultimately lead to the Vision developed.

3.3 Strategic Organizing Framework – Core Programs and Partnerships

Core Programs

A major theme that emerged throughout the interviews was the need for the Museum to become more focused in core program areas. This understanding was the genesis of the strategic focus upon the STEAM technologies of: material culture; food and agriculture; engineering; and environment. These four

technology areas reflect, in part, the Museum's existing orientation in terms of its collection and programs. For example:

- 1) **material culture technology:** the ceramics workshop, and the pottery classes offered, reflect not only the aboriginal history of the area - pottery was actually crafted on the Museum site - but also a material technology that has been used by all cultures. Similar material culture activities are undertaken in the Textile Lab and Blacksmith Shop.
- 2) **agriculture and food:** the 'agriculture and food' theme also clearly reflects the agricultural roots of the municipality, as well as the current reality of Markham having one of the most ethnically diverse range of restaurants anywhere in the GTA. Currently on site the Museum has gardens and an orchard.
- 3) **engineering technology:** this theme reflects not only the ingenuity of ancestral cultures in fabricating agricultural implements and practices, but also the current high-tech transportation and computer industries of the municipality. These technologies crossover into 1) and 2) above.
- 4) **environmental technology:** this relates to the interaction of humans and the environment that has created the landscape that is Markham today, as well as the considerable environment-related industry that has flourished in the municipality. Finally, of course, the Museum and all other municipal institutions in the City are concerned with their own operation being sustainable and not environmentally damaging.

These four key program areas thus form the core focus that will govern future activities of the Museum in terms of collections, exhibitions, programs, etc.

Strategic Partners

In addition to the need for a more strategic focus governing Museum activities in collections, exhibitions and programs, a companion theme heard through the interviews was the need for the Museum to do a better job of engaging potential partners. Three groups of potential partners were envisaged in this regard: 1) the diverse cultural communities that comprise Markham today; 2) business and the private sector and 3) community organizations. Through more proactive engagement with these groups it was felt the Museum could significantly increase its profile within the community and awareness of the excellent programs and opportunities the Museum has to offer.

Three groups of 'strategic partners' are envisaged, which cover the social, economic and cultural life of the community:

- 1) **'Cultural Diversity' Partners:** Potential partners here are the various cultural communities (including the founding communities) that have made their homes in Markham. The opportunity for them would be to tell the story(ies) of settling in Canada, why they have congregated in Markham, the impact that they have had upon the community, and the impact the community has had upon them. Potential co-location of various multicultural groups at the Museum would by itself send a strong message of peaceful co-existence and the fact that Markham and Canada is

a place that celebrates diversity and difference. It would also serve as a prime location for food-related and cultural festivals.

- 2) **'Community Commons' Partners:** This precinct would provide a platform for the various not-for-profit groups in Markham to similarly tell their stories about who they are, how they benefit the community, how people can become involved, etc. The opportunity for them would be not only to get their story out, but also to possibly recruit new members and support and engage with the community for new project ideas and activities, etc.

A possible partnership would be with the new local campus of York University or Seneca College where the Museum dedicates spaces as a remote learning centre. A multipurpose space could be created either in an addition to the existing Exhibit/Collection Building (see Appendix B) or in retrofitted space in another building on the Museum site.

- 3) **'Commercial Community' Partners:** Here the commercial community, in all its various forms, has an opportunity to showcase their activities. These pavilions would provide an opportunity for them to not only present why they came to Markham, but also discuss the interesting things they do, and raise their overall profile in the City. As well, smaller business and entrepreneurs might be profiled here. Worker organizations might have a place here as well (although they might also be part of the 'Community Commons' precinct).

Interrelationship of Core Programs and Strategic Partners

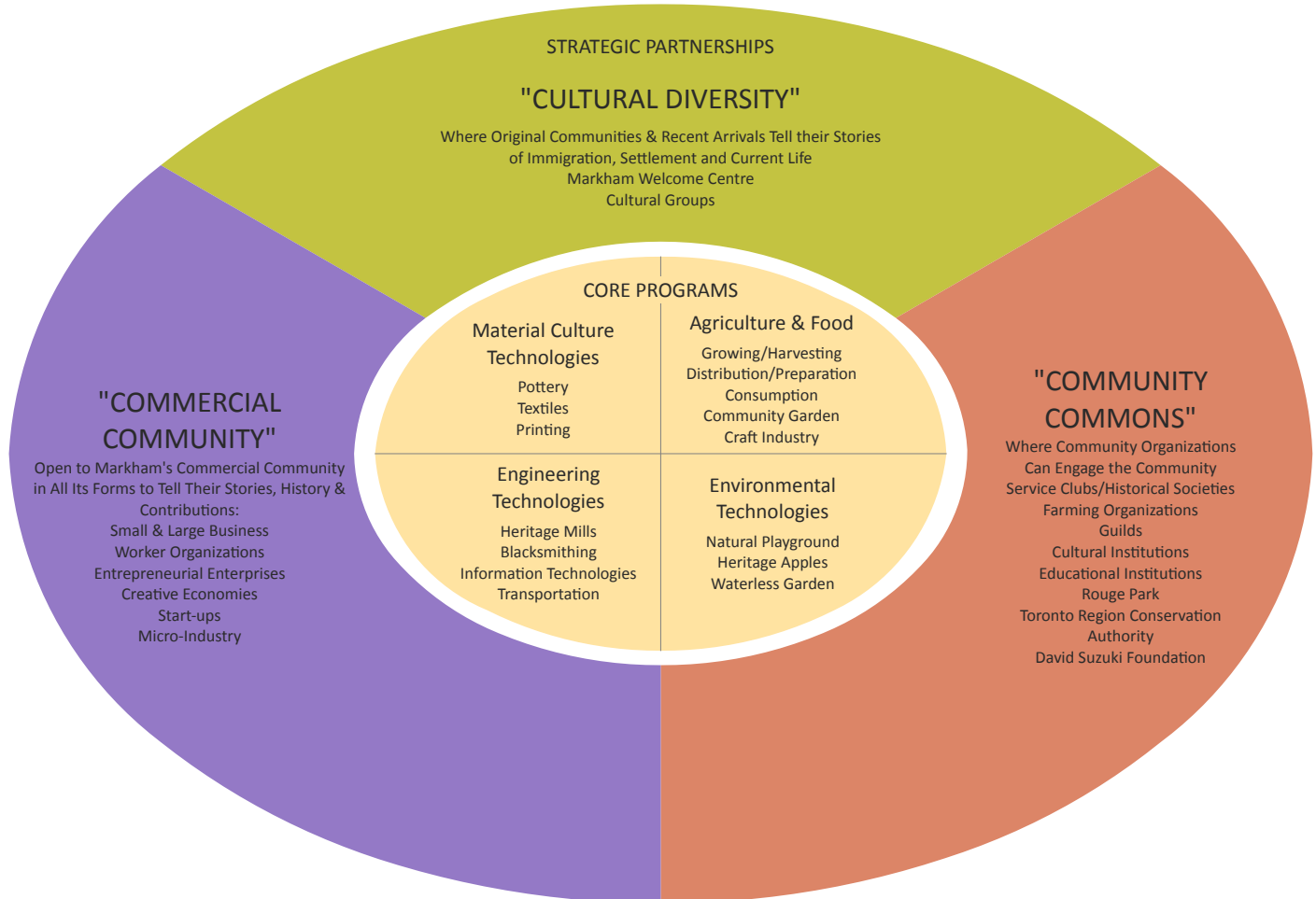
The matrix below illustrates some possibilities for interaction that are generated through this kind of approach:

The examples shown are not meant to recommend specific types of program possibilities, but rather simply to show the power of this kind of approach in generating ideas for programs and partnerships in the community. The fact that there are possibilities in every cell of the matrix shows it to be a rich generator of ideas for programs, exhibitions, collections, events, etc.

Examples of Program Possibilities Generated by the SOF		Core Museum Program Areas			
		Material Culture	Agriculture and Food	Engineering Technology	Environmental Technology
Potential Partners	Cultural Diversity Partners	Techniques of pottery, textiles, etc. in different cultures (demonstrations, displays)	Food festivals with wide variety of cuisine types	Settlement (engineering) challenges in Markham and how these have been overcome by different groups	Exhibit on cultural approaches to landscape: shaping and caring for the land
	Community Commons Partners	Displays from arts and crafts organizations in the community Programs and events offered in conjunction with other cultural organizations (Flato, Varley)	Community gardens Community kitchen Food bank	Informational displays from professional organizations (architects, engineers) Settlement history of Markham, and how various challenges were overcome	Planning and development challenges of Rouge Park
	Commercial Community Partners	Businesses that fabricate materials used in arts and crafts	Foods grown and processed in Markham Tours of farms, food processing	Displays of engineering projects by Markham-based companies ('Markham Biennale')	Display of environmental technologies of today and tomorrow by Markham-based companies

Strategic Organizing Framework

The diagram below shows graphically how the interrelationship of core programs and strategic partners would operate.



3.4 Museum Strategy Goals and Recommendations

This section of the Report outlines the recommendations of this plan in detail. The first two recommendations (“Administrative / Procedural”) simply relate to the formal recognition and adoption of the strategy, and a commitment to implementing it by virtue of reviewing progress on an annual basis.

A) Administrative / Procedural Recommendations

Recommendation 1) Adopt Strategic Plan:

Municipal Council should adopt this plan in principle and refer it to the Department of Culture and Economic Development staff for advice on implementation. This recommendation recognizes that for something as large and complex as this strategic plan it may not be feasible for Council to simply adopt the entire plan as is and commit staff to implementing it in its fine detail. Rather, because a strategic plan such as this covers a multi-year timeframe and because there are inevitable intervening opportunities and challenges that arise, it is recommended that the plan be adopted but then referred to staff to advise Council on implementation of the recommendations.

Recommendation 2) Outcomes Orientation:

An outcomes scorecard for this plan should be developed by staff (following suggestions contained in this Report) and used to measure achievements and targets met. At the conclusion of the first year of implementation, Museum staff should be directed to prepare progress report on outcomes and achievements under the plan. This progress report should consider:

- Specific progress made on all initiatives in the plan over the past year (achievements, activities undertaken)
- Report on any strategic objectives not accomplished; reasons why; and remedial actions to be undertaken in the year ahead
- New challenges and opportunities that have arisen since the adoption of the strategic plan; actions being undertaken to address each
- Basic metrics: attendance; program participation; earned revenues [as a % of total budget]; budget per visitor; etc.
- Other possible metrics include: visitor satisfaction; partnership development/contribution; community awareness and appreciation; educational value; assessment of pride in their museum by local visitors

This should form the basis for a written and on-line ‘report card’ for distribution to stakeholders and the general public, as well as a presentation to Council.

B) Strategic Organizing Framework

Recommendation 3) Adopt Vision and Mission Statements:

Adopt the revised Vision and Mission statements prepared in the context of this strategic plan by Museum management, staff and the consultant team. As mentioned, the Vision and Mission Statements,

documented earlier in the report, are foundational in driving the strategy outlined here. They should be adopted as the basis for this strategic plan.

Recommendation 4) Articulation of Strategic Organizing Framework and Partnership Strategy:

The SOF outlined earlier should be adopted as the driving thematic approach informing collections, exhibitions, programs, and events. It will also drive the development of active partnerships with the 'Cultural Diversity', 'Community Commons' and 'Commercial Community' organizations referred to above. A Partnership Development orientation should be adopted by the Museum so that every program and exhibit would be aligned with a community sponsor (a cultural community, corporate sponsorship, or community organization.) In a sense, everything that the Museum does in a programming sense should fit into the SOF at one or more points. This lens or perspective will help to focus Museums efforts in storytelling as well as suggest potential partners and colleagues in the overall enterprise. As previously stated, the strategic focus of the museum should be articulated as (1) material culture; (2) agriculture and food; (3) engineering; and (4) environment.

One implication of the SOF approach is that most (if not all) programs and events would be planned in collaboration with one or more community partners. This approach ensures that there is proactive outreach on the part of the Museum. The role of the Museum becomes to curate the theme and story(ies) for the community, involving a wide section of the municipality.

Recommendation 5) Alignment of Permanent Exhibit Program with Key Areas of Focus:

Over time, the program for permanent exhibits should continue to be redeveloped to align with the Strategic Organizing Framework. All permanent exhibits on the site including the "What is Markham" exhibit in the south gallery of the Exhibit/Collection Building should be reviewed as to their relevance to the SOF. All permanent exhibits should be redeveloped, eliminated and/or relocated to reflect the orientation of the SOF and the requirements of the proposed Master Plan. The development of all new permanent exhibits should embrace modern exhibit approaches including greater interactivity, flexible and updatable modules, etc. The goal is to develop interactive experiential learning rather than tours and interpretive exhibits.

Recommendation 6) Articulation of Revised Collections Policy:

The collections policy should be revised to reflect the Strategic Organizing Framework outlined above including a detailed deaccessioning strategy. The collections policy of the Markham Museum should be revised to reflect the SOF established, and ensure that items collected are reflective of the programs and exhibits emphasis implied by that approach. It is anticipated that de-accessioning of collection materials will be an important part of the strategy. The de-accessioning efforts should also be aligned with a collection strategy to ensure that the collection is honed to the needs of the SOF. Having said this, it should also be noted that there may be items that come up for acquisition that are unique and reflective of the history of Markham, but that may not have a direct and explicit tie to the SOF. There should accordingly be some latitude for the discretion of the Collections Committee to collect artifacts that are felt to be important to the history of the community but somewhat outside of the direct purview of the SOF. Artifacts and archival material in the collection will be a valuable resource to properly share the Markham story.

C) Site and Master Plan Development Recommendations

Recommendation 7) Develop Museum Master Plan:

A Museum and Site Master Plan should be prepared that reflects the decisions made regarding the use of the building and the site to extend museum programming as well as the specific recommendations regarding buildings (e.g. the Mount Joy School, the Exhibit / Collections building, etc.). As an integral component of the Museum Master Plan, a Site Interpretive Plan is recommended, that would provide orientation and examine the various buildings and structures on the site from the perspective of their ability to help interpret the Strategic Organizing Framework (as well as provide a positive visitor experience). The Museum and Site Master Plan must be flexible so as to mesh with the strategy to build Museum programs and partnerships. Appendix A of this Report contains some preliminary ideas regarding a Site Master Plan that would be consistent with the directions outlined here, as well as listing key components and activities that would be required in the development of the Site Master Plan. This is presented as a ‘starting point’ for the actual detailed development of a master plan itself.

It is important to keep in mind a Master Plan is a tool for mapping out the future development of the Museum and site over the next 20 to 25 years. It would include a comprehensive review of the challenges currently facing the Museum and the Museum’s objectives for the future as outlined in this Strategic Plan. It would identify specific recommendations on the steps and infrastructure needed to meet the challenges and achieve the objectives. It would include an implementation plan that lays out a step-by-step, year-by-year process for implementing the recommendations of the Master Plan. Ultimately it is a tool to be used by the Museum and the City to identify and plan for capital expenditures and fund raising and partnership requirements over the next 25 years.

Recommendation 7a) Expand the Current Long-Term Programs / Exhibitions Plan to Include Active Partnership Involvement:

A long-term plan (e.g. 3-5 years) be developed for both programs and exhibitions that includes active partnerships – also aligned with the SOF. Once the SOF is in place, and discussions with various potential partners are underway, a longer-term programs and exhibitions plan should be developed. This long-term plan should take a number of factors into consideration:

- The opportunity to coincide with major provincial and national events
- Possibilities for collaboration with the City’s other cultural venues (Flato Theatre and Varley Art Gallery)
- Opportunities to sequence programs and events so that one builds on another, from one year to the next
- Opportunities that may exist for grants and sponsorships
- Opportunities to collaborate with other community partners (cultural organizations, ‘community commons’ groups and ‘commercial community’ organizations)
- Continue developing opportunities for inter-departmental involvement, i.e. Programs in addition to Curatorial introducing ideas for exhibits

Recommendation 7b) Review the Importance and/or Relevance of All Existing Structures on the Site:

All existing structures on the site, including the historic buildings, should be reviewed as to their relevance to the SOF and/or ongoing Museum operations. Those structures deemed no longer relevant, important or useful to ongoing Museum programs and operation or are unsafe should be relocated or removed from the site. As a result of the ad hoc manner in which the site has developed over the years one of the biggest challenges facing the Museum is developing a coherent and flexible site plan that can meet the requirements of the SOF. All structures that do not meet these requirements should be repurposed, demolished or removed from the site. Similarly if existing structures or site elements that continue to be deemed relevant but their current location restricts the development of the site plan should be relocated to a more appropriate location on the site.

Recommendation 7c) More Active Use of the Site to Extend Museum Programming:

The use of the site to extend the programming and interpretive elements of the Museum focus should be pursued. Another implication of the SOF approach is that of using the entire site to extend Museum programming. Elements to be considered would include a community gardens and greenhouse (further to the 'Food Technology' theme); community kitchen (same theme); and a natural playground area (further to 'Environmental Technologies'). See Appendix B for more details.

Recommendation 7d) More Collection Storage:

More and better storage space is required to accommodate collections that remain housed in poor conditions around the site and are currently at risk. Over the long-term these collections should be accommodated in an expanded Exhibit/Collection Building. A common theme heard throughout the interview process was that there was insufficient space to accommodate the existing collection (even recognizing de-accessioning efforts) let alone space to accommodate the influx of new materials that might be expected through more active collecting according to the SOF. Ideally all collections should be housed together on the site in a controlled environment. An expanded Exhibits / Collections Building would address this need and over the longer-term would be the most efficient and expedient means of accommodating these needs. Over the short-term it is recommended the Museum rent well conditioned off-site storage space to accommodate these collections.

Appendix B contains an example of what an expanded Exhibit/Collection Building might look like. (Note that this is simply an example for illustrative purposes: a more detailed design and costing of this initiative would need to be undertaken at the appropriate time).

Also at risk are the Museum's large agricultural implements. They are similarly scattered around the site and stored in poor conditions. Over the longer-term they will also require improved storage space and conditions. One possibility is to review the current uses in the Transportation Building and explore opportunities for reconfiguring and expanding it, if needed, to house this collection.

Recommendation 7e) Exhibit Storage:

Space is also needed to house the Museum's exhibit storage requirement. An expanded Exhibit/Collection Building could also meet this requirement. The Museum currently rents off-site space for the storage of

packing crates and temporary exhibit materials at a cost of between \$20,000 and \$25,000 per year. Over the longer-term expanding the existing Exhibit/Collection Building would eliminate these costs

Recommendation 7f) Consolidation of Staff into Exhibit/Collection Building:

Staff should be consolidated into the Exhibit/Collection Building, which will likely need to be expanded to accommodate them as well as provide additional space for exhibit storage and collections. At present, Museum staff is split between the current administration building (the Mount Joy School) and the new Exhibit/Collection Building. This is sub-optimal in terms of facilitating interaction and communications between the staff and creating an efficient and effective working environment. With the opportunity to transform the Mount Joy School into a dedicated programming facility, there is a logical strategy to further expand the Exhibit/Collection building to accommodate all staff.

Recommendation 7g) Repurpose Mount Joy School for Programming:

The freed-up Mount Joy School should be used as program space. It could also be positioned as rental space for outside organizations. A higher and better use for the School would be as a dedicated program space, as well as the provision of rental opportunities for the community (see Recommendation #7j). The classroom spaces in the building are also well suited to programming activities. The Museum's proposed Master Plan (Recommendation #7) should contain this as a key element.

Recommendation 7h) Expanded Gift Shop Operation:

The current gift shop operation is quite small and reportedly generates little for the Museum in terms of interest or gross revenue. It should be repositioned to become a more compelling part of the overall visitor experience. There was some desire expressed from the interviews to see an expanded gift shop operation with a larger range of merchandise available (perhaps featuring locally-produced crafts and articles). As well, evidence from visitor studies on other museums and galleries has shown that a gift shop experience can be a very important element of the overall visitor satisfaction. It is important in this regard to ensure that the merchandise available is not just 'trinkets and trash' but has a discernable alignment with the overall purpose and theme of the Museum (i.e. is consistent with the SOF). A business case for an expanded gift shop operation should be undertaken, and any expansion of space accommodated for within the plan for the expanded Exhibits and Collections Building.

Recommendation 7i) Review the Long-Term Use of the South Gallery in the Exhibit/Collection Building:

As a result of its strategic location near the entrance to the Museum and site the use of the South Gallery should be examined in the context of all the space use demands the Museum is facing. The South Gallery currently houses the permanent 'What is Markham' exhibit. As part of the proposed Master Plan exercise the importance, relevance and location of this permanent exhibit in its current configuration should be reviewed. The space it currently occupies could also be used as an orientation/event space that somehow includes the story of Markham's history. It could also be used as an 'orientation centre' to explain to the public the logic underlying the SOF. An expanded gift shop will also require more space near the entrance/exit from the Museum.

Recommendation 7j) Greater Rentals Focus:

The Museum should continue to actively promote rentals of the site and buildings. Rentals of currently underutilized buildings and areas on site should be explored more aggressively at non-peak times such as evenings and weekdays. Rentals are important not so much as revenue generators, but more so as a means to expose new and different publics to the benefits of the Museum and the site (many of whom otherwise would likely never visit). The Museum has had considerable recent success in attracting new audiences through rentals and has reached capacity at certain peak times (e.g. summers and weekends). A pricing policy that encourages community use (as opposed to strictly maximizing revenues) should be set.

D) Operations Recommendations

Recommendation 8) Expand Range of Activities and Events:

The interviews revealed a strong desire for new and expanded programs to serve the needs of the diverse community (e.g. 'Economics Camp'). At the same time, the constrained capacity of the existing Museum resources (human and financial) places real limits on the ability to provide new and diverse programming. Accordingly, it is recommended that new program development be approached cautiously, starting with a review of the effectiveness of existing programs and services, and introducing new activities only when there is a strong business case to do so, and when there are resources made available by withdrawing from some existing programs.

Recommendation 8a) Restructure Tour Offerings:

The existing general tours should be discontinued. More specific thematic tours aligned with the SOF should be offered. There was a general feeling from the interviews that the demand for General Admission Tours was low, and that they could be quite disruptive to on-going operations. They should be discontinued. However, in the longer term, the possibility of specific topical tours (aligned with the focus of the Strategic Organizing Framework) should be explored. (The possibility of offering these on a pre-booked basis, and at a premium price, is also recommended.) Also recommended is the development of open door self-guided tours with interactive exhibit components. The use of audio equipment or even creating the opportunity of patrons using their personal mobile devices to access an on-line guided tour should be explored.

Recommendation 8b) Expand School Group Tours:

School group tours are of course actively offered at the Museum, and the Strategic Organizing Framework provides a mechanism for the Museum to become even more relevant in offering these (particularly as it fits so well with the STEM – and STEAM – educational approach). An outcome-oriented goal could be for every school child in Markham to visit the Museum at least once in his or her school 'career' (i.e. spanning the grades from 1 to 12).

Recommendation 9) Create Strategic Marketing Plan:

A marketing plan should be developed for the Museum, identifying target markets, key messages marketing media, budget, etc. This marketing plan should be aligned with those of the Flato Theatre and the Varley Gallery. A key element to be explored in this plan would be the optimal utilization of the site as

a location for promoting events and activities (e.g. though an attractive electronic sign). This would be both for the Museum as well as other community events – as well, the possibility of selling advertising space should be considered.

Recommendation 10) Explore a New Museum Name:

On several occasions during the interviews it was suggested that a more dynamic and interesting name be chosen for the Markham Museum. It was also suggested the Museum explore sponsorship opportunities akin to the Flato Theatre.

... clearly there are many possibilities.

Recommendation 11) Explore More Active Membership Development Program:

At the moment the membership program does not appear to be actively supported. However, this can be a key element of an audience development, and ultimately, fundraising strategy. Many cultural organizations have found that an active membership strategy can be a key element of a strategic approach to audience development and ultimately fundraising development. Typically a membership program involves free admission and discounts in the gift shop, which might be thought of as acting to diminish potential revenues. But often the member ends up visiting more frequently (which boosts attendance figures) and spending more in the gift shop than they otherwise might have. A longer-term value of an active membership program is that members, feeling an affinity with the cultural organization and wishing to identify with it, may be more likely to support through donations and ultimately bequests. This is a route that should be explored in greater detail.

Recommendation 12) Create Fundraising / Sponsorship Strategy:

A Fundraising & Sponsorship strategy should be developed by the Museum. With the exciting new direction implied by the SOF and the renewed partnership orientation, there is an opportunity to take a more active approach to fundraising development. The Friends of the Museum should form a fundraising committee and develop plans for both capital and operating fundraising (i.e. an annual donation campaign). On the capital side, fundraising for key projects such as the expansion of the Exhibits / Collections Building (which will be a large capital item) as well as the retrofit of the School into programming space, will be priorities. As well, once the proposed Master Plan is complete, there will undoubtedly be additional capital items implied.

On the operating side, there will presumably be many opportunities for both fundraising and sponsorships. Depending upon the specific programs and events, there may be opportunities to explore joint fundraising and sponsorship initiatives with the City's other cultural facilities: the Flato Theatre and the Varley Art Gallery.

The Friends of the Museum could play a significant role as well in any fundraising activities (see Recommendation #13).

Recommendation 13) Strategic Plan for the Friends of the Museum:

It is recommended that the Friends of the Markham Museum prepare their own strategic plan in light of their potential to assist in the implementation of SOF. Once the Museum's Strategic Plan is adopted by

City Council the Friends should undertake their own strategic review and prepare a plan to identify how they can best assist in the implementation of the SOF.

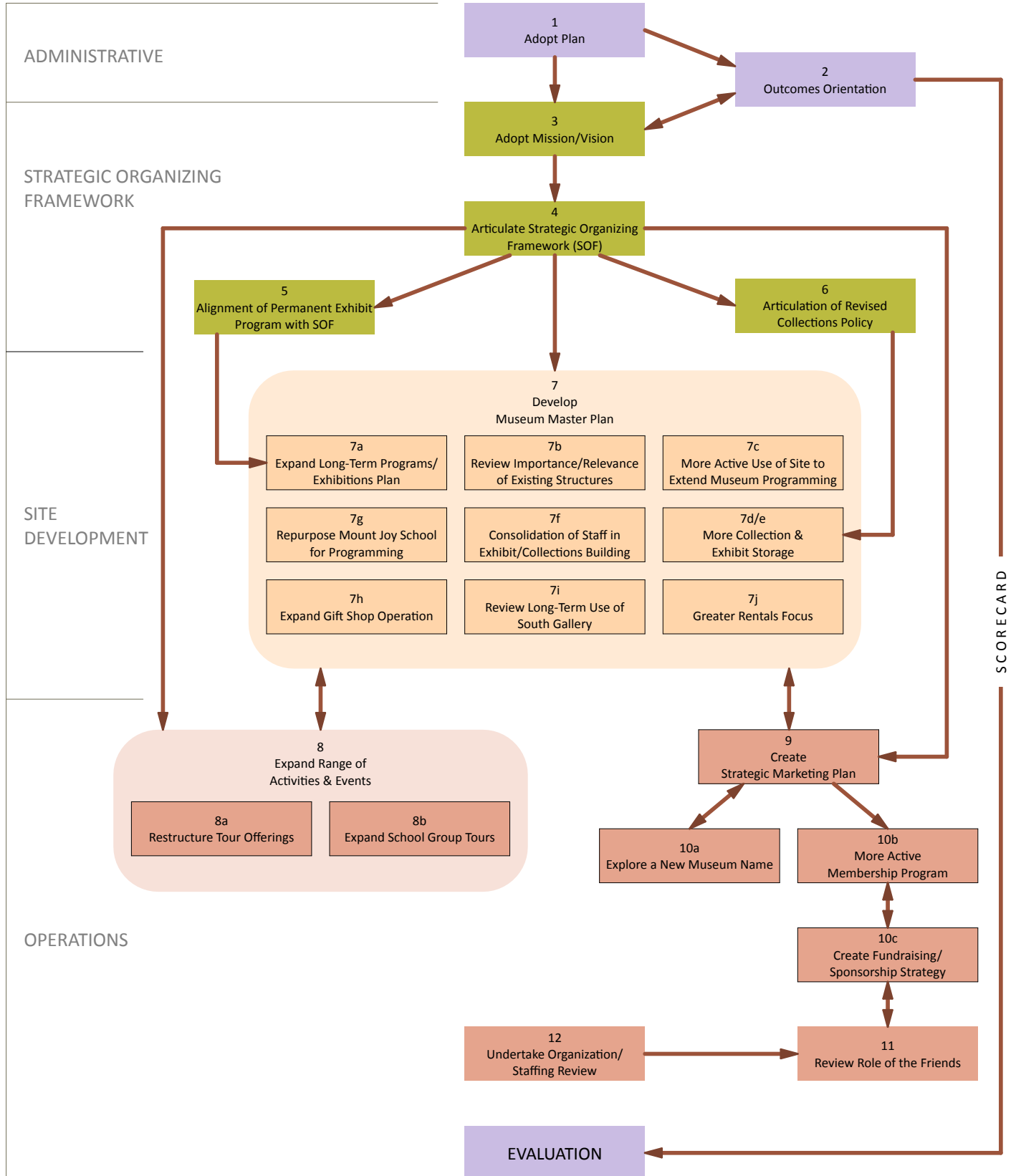
Recommendation 14) Undertake Organization and Staffing Review:

Several of the recommendations outlined here imply changes to the existing organization and staffing structure of the Museum. A subsequent organization study should be undertaken. There are certain key functions implied by this strategic plan that may require either a re-alignment of existing responsibilities, or obtaining additional new staff. These new functional responsibilities include:

- greater emphasis on overall site management and coordination
- fundraising expertise
- program and partnership development
- (possibly) technical expertise in one or more of the areas of core focus of the Museum
- marketing and social media

A separate organization and staffing review should be undertaken to determine the fit of the existing staffing model with an optimal new structure. This would also entail the updating of job descriptions to ensure a match between the strategic needs of the organization and the staffing structure.

Following is a graphic illustrating the organization of the proposed recommendations.



4.0 PART D – IMPLICATIONS OF THE STRATEGIC PLAN

4.1 General Financial Implications of Study Recommendations

In this section of the Report we outline the financial implications of the recommendations in the chart below. As well, the chart outlines the suggested timeframe for implementation of the various recommendations over a 10-year period, which is:

- Immediate: in the next year: to begin the initiative in 2017
- Short-Term: in the next 3 three years: 2018 or 2019
- Medium-Term: in the next 4 of 5 years: 2020-2021
- Longer-Term: 5 to 10 years from now: 2022 - 2026+

Recommendation	Timeframe	Capital Cost Implications	Operating Resource Requirements	
			Staff Time	Operating Cost
A) Administrative / Procedural Recommendations				
Recommendation 1) Adopt Strategic Plan: Municipal Council should adopt this plan in principle and refer it to the Department of Culture and Economic Development staff for advice on implementation.	Immediate	none	none	none
Recommendation 2) Outcomes Orientation: An outcomes scorecard for this plan should be developed by staff (following suggestions contained in this Report) and used to measure achievements and targets met.	Immediate	none	Staff time to determine outcome measures & design scorecard	none
B) Strategic Organizing Framework				
Recommendation 3) Adopt Vision and Mission Statements: Adopt the revised Vision and Mission statements prepared in the context of this strategic plan by Museum management, staff and the consultant team.	Immediate	none	none	none
Recommendation 4) Articulation of Strategic Organizing Framework and Partnership Strategy: The SOF outlined earlier should be adopted as the driving thematic approach informing collections, exhibitions, programs, and events. It will also drive the development of active partnerships with the ‘Cultural Diversity’, ‘Community Commons’ and ‘Commercial Community’ organizations referred to above. A Partnership Development orientation should be adopted by the Museum so that every program and exhibit would be aligned with a community sponsor (a cultural community, corporate sponsorship, or community organization).	Immediate	none	Staff time to revise / develop policies to support SOF and partnership development	Possibly some small operating budget amount to support / explore potential community partnerships; print collateral materials, etc.
Recommendation 5) Alignment of Permanent Exhibit Program with Key Areas of Focus: Over time, the program for permanent exhibits should be redeveloped to align with the Strategic Organizing Framework.	Short-Term, and on-going	Some capital cost implication to be considered in Museum Master Plan (Recommendation #7)	Assist in planning required space; preparing /moving items ; etc.	Some additional utilities, insurance costs for additional space
Recommendation 6) Articulation of Revised Collections Policy: The collections policy should be revised to reflect the Strategic Organizing Framework outlined above including a detailed deaccessioning strategy.	On-going, complete in Short-Term	none	Staff time to develop revised policy	none

Recommendation	Timeframe	Capital Cost Implications	Operating Resource Requirements	
			Staff Time	Operating Cost
C) Site and Master Plan Development Recommendations				
Recommendation 7) Develop Museum Master Plan: A Museum and Site Master Plan should be prepared that reflects the decisions made regarding the use of the building and the site to extend museum programming as well as the specific recommendations regarding buildings (e.g. the Mount Joy School, the Exhibit / Collections building, etc.). As an integral component of the Museum Master Plan, a Site Interpretive Plan is recommended, that would provide orientation and examine the various buildings and structures on the site from the perspective of their ability to help interpret the Strategic Organizing Framework (as well as provide a positive visitor experience).	Medium-Term	One-time costs for the development of the Master Plan (on the order of \$75,000 - \$100,000)	Staff time associated with the overseeing of the development of the Master Plan	minimal
Recommendation 7a) Expand the Current Long-Term Programs / Exhibitions Plan to Include Active Partnership Involvement: A long-term plan (e.g. 3-5 years) be developed for both programs and exhibitions that includes active partnerships – also aligned with the SOF.	Short-Term, and on-going	No incremental costs anticipated beyond regular costs of exhibitions	Possibly some incremental staff time (in negotiating / dealing with partners)	No incremental costs anticipated
Recommendation 7b) Review the Importance and/or Relevance of All Existing Structures on the Site: All existing structures on the site, including the historic buildings, should be reviewed as to their relevance to the SOF and/or ongoing Museum operations. Those structures deemed no longer relevant, important or useful to ongoing Museum programs and operation or are unsafe should be relocated or removed from the site.	Medium-Term and on-going	Costs associated with demolishing or relocating existing structures	Staff time will be needed to undertake review / staff time will be needed to manage the work of demolition / relocation	none
Recommendation 7c) More Active Use of the Site to Extend Museum Programming: The use of the site to extend the programming and interpretive elements of the Museum focus should be pursued.	Medium-Term and on-going	Some site-related costs: signage, walkways, etc. – to be determined in Master Plan	Possibly some additional staff time associated with additional programming	Operating costs expected to be same as present
Recommendation 7d) More Collection Storage: More and better storage space is required to accommodate collections that remain housed in poor conditions around the site and are currently at risk. Over the long-term these collections should be accommodated in an expanded Exhibit/Collection Building.	Long-Term	Major capital cost implication – to be determined in Master Plan	To assist in planning required space; preparing /moving items ; etc.	Some additional utilities, insurance costs for additional space
Recommendation 7e) Exhibit Storage: Space is also needed to house the Museum’s exhibit storage requirement. An expanded Exhibit/Collection Building could also meet this requirement.	Long-Term	Major capital cost implication – to be determined in Master Plan	To assist in planning required space; preparing /moving items ; etc.	Some additional utilities, insurance costs for additional space
Recommendation 7f) Consolidation of Staff into Exhibit/Collection Building: Staff should be consolidated into the Exhibit/Collection Building, which will likely need to be expanded to accommodate them as well as provide additional space for exhibit storage and collections.	Long-Term	Major capital cost implication – to be determined in Master Plan	It is anticipated that there will be major operating efficiencies entailed in this move (Note 2)	Some additional operating costs for expanded space
Recommendation 7g) Repurpose Mount Joy School for Programming: The freed-up Mount Joy School should be used as program space. It could also be positioned as rental space for outside organizations.	Long-Term	Major capital cost implication – to be determined in Master Plan	Some additional staff time associated with additional programming	Operating costs expected to be same as present (Note 3)

Recommendation	Timeframe	Capital Cost Implications	Operating Resource Requirements	
			Staff Time	Operating Cost
Recommendation 7h) Expanded Gift Shop Operation: The current gift shop operation is quite small and reportedly generates little for the Museum in terms of interest or gross revenue. It should be repositioned to become a more compelling part of the overall visitor experience.	Long-Term (part of renovation of Exhibits / Collection building)	Part of capital costs incurred in Recommendation #7	Possibly additional staff (or volunteer) time involved in gift shop operation	Greater range and volume of goods sold will imply greater cost of goods sold – but ultimately greater net revenues for shop operation overall
Recommendation 7i) Review the Long-Term Use of the South Gallery in the Exhibit/Collection Building: As a result of its strategic location near the entrance to the Museum and site the use of the South Gallery should be examined in the context of all the space use demands the Museum is facing.	Long-Term (part of renovation of Exhibits / Collection building)	Major capital cost implication – to be determined in Master Plan	Depending on the final use of the space staff time may be required	Depends on final use of the space
Recommendation 7j) Greater Rentals Focus: The Museum should continue to actively promote rentals of the site and buildings. Rentals of currently underutilized buildings and areas on site should be explored more aggressively at non-peak times such as evenings and weekdays.	Immediate and ongoing	none	Staff time involved in more active rentals focus (Note 4)	none
D) Operations Recommendations				
Recommendation 8) Expand Range of Activities and Events: The interviews revealed a strong desire for new and expanded programs to serve the needs of the diverse community (e.g. 'Economics Camp').	Immediate, and ongoing	none	possibly some amount of additional staff time plan events	none
Recommendation 8a) Restructure Tour Offerings: The existing general tours should be discontinued. More specific thematic tours aligned with the SOF should be offered.	Immediate – Short-Term	none	Staff and/or volunteer time involved in development and delivery of more focused tours	Minimal (Note 5)
Recommendation 8b) Expand School Group Tours: School group tours are of course actively offered at the Museum, and the Strategic Organizing Framework provides a mechanism for the Museum to become even more relevant in offering these (particularly as it fits so well with the STEM – and STEAM – educational approach).	Immediate – Short-Term	none	Staff and/or volunteer time involved in development and delivery of school tours	Minimal
Recommendation 9) Create Strategic Marketing Plan: A marketing plan should be developed for the Museum, identifying target markets, key messages marketing media, budget, etc.	Immediate – Short-Term	One-time cost of \$10,000 - \$15,000 to develop plan	Staff time involved	Possibly additional amount for marketing purposes (to be determined)
Recommendation 10) Explore a New Museum Name: On several occasions during the interviews it was suggested that a more dynamic and interesting name be chosen for the Markham Museum.	Short – Medium-Term	Possible some out-of-pocket cost to provide assistance; or could be done in-house	Staff time involved	Minimal, after initial costs of conversion
Recommendation 11) Explore More Active Membership Development Program: At the moment the membership program does not appear to be actively supported. However, this can be a key element of an audience development, and ultimately, fundraising strategy.	Short-Term	none	Staff time involved	Minimal

Recommendation	Timeframe	Capital Cost Implications	Operating Resource Requirements	
			Staff Time	Operating Cost
Recommendation 12) Create Fundraising / Sponsorship Strategy: A Fundraising & Sponsorship strategy should be developed by the Museum. With the exciting new direction implied by the SOF and the renewed partnership orientation, there is an opportunity to take a more active approach to fundraising development.	Short-Term	Fundraising expertise may be required – cost range \$20,000 - \$30,000 to develop approach and strategy	Staff time involved	Small on-going operating budget may be required
Recommendation 13) A Strategic Plan for the Friends of the Museum: It is recommended that the Friends of the Markham Museum prepare their own strategic plan in light of their potential to assist in the implementation of SOF.	Short-Term	None	Staff time involved – could be part of the organization & staffing review mentioned in previous recommendation	Minimal
Recommendation 14) Undertake Organization and Staffing Review: Several of the recommendations outlined here imply changes to the existing organization and staffing structure of the Museum. A subsequent organization study should be undertaken.	Medium-Term	Given department organization review that is on-going. This is likely to be an in-house initiative following from that process	Staff time involved	Minimal

4.2 Next Steps: Timeline for Study Recommendations

Recommendation	Immediate 2017	Short-Term 2018 - 2019	Medium-Term 2020 - 2021	Long-Term 2022 - 2026+
Recommendation 1) Adopt Strategic Plan				
Recommendation 2) Outcomes Orientation				
Recommendation 3) Adopt Vision and Mission Statements				
Recommendation 4) Articulation of Strategic Organizing Framework and Partnership Strategy				
Recommendation 8a) Restructure Tour Offerings				
Recommendation 8b) Expand School Group Tours				
Recommendation 6) Articulation of Revised Collections Policy				
Recommendation 9) Create Strategic Marketing Plan				
Recommendation 10) Explore a New Museum Name				
Recommendation 7j) Greater Rentals Focus				
Recommendation 8) Expand Range of Activities and Events				
Recommendation 5) Alignment of Permanent Exhibit Program with Key Areas of Focus				
Recommendation 11) Explore More Active Membership Development Program				
Recommendation 12) Create Fundraising / Sponsorship Strategy				
Recommendation 7a) Expand the Current Long-Term Programs / Exhibitions Plan to Include Active Partnership Involvement				
Recommendation 7) Develop Museum Master Plan				
Recommendation 7b) Review the Importance and/or Relevance of all Existing Structures on Site				
Recommendation 7c) More Active Use of the Site to Extend Museum Programming				
Recommendation 7d) More Collection Storage				
Recommendation 7e) Exhibit Storage				
Recommendation 7f) Consolidation of Staff into Exhibit/Collection Building				
Recommendation 7g) Repurpose Mount Joy School for Programming				
Recommendation 7h) Expanded Gift Shop Operation				
Recommendation 7i) Review the Long-Term Use of the South Gallery in the Exhibit/Collection Building				
Recommendation 13) Strategic Plan for the Friends of the Museum				
Recommendation 14) Undertake Organization and Staffing Review				

4.3 Areas of Consideration in Further Policy Studies

Areas of consideration in further policy studies would include:

- Museum and Site Master Plan / Site Interpretation Plan
- Strategic Marketing Plan
- Long-term Programs / Exhibition Plan
- Fundraising / Sponsorship Strategy
- Gift Shop Business Plan
- Organization and Staffing Review
- Strategic Plan of the Friends of the Museum

Preliminary Master Plan Outline: Principles and Schematic



PRELIMINARY MASTER PLAN OUTLINE: PRINCIPLES AND SCHEMATIC

Over the years the Museum site has evolved in a rather ad hoc manner. The early concept for the site was that of a historic village and this approach worked well for the Museum for a number of decades. However, as the City of Markham has grown and the make up of the community has evolved, as with many growing communities, this type of approach has lost a lot of its original appeal. The result is a site of many far-flung structures that presents a number of challenges in terms of rationalizing its overall organization and finding ways to accommodate new development to meet the needs of the proposed Strategic Organizing Framework. As identified in the interviews some of the Museum's most challenging site concerns include:

- A disconnect between Museum activities, the Museum's audience and the site
- Insufficient programming and rental space
- Insufficient exhibit and collection storage space
- Staff divided into two separate locations
- Underutilized and in some cases unsafe and deteriorating facilities
- A lack of opportunity for new development

One of the key recommendations of the report is the preparation of a new Museum and Site Master Plan. The Museum's current master plan is over 10 years old, has not been implemented and is out dated. At this stage it is important for the Museum to develop a new master plan based on the recommendations of the SOF. It must set out a direction for the development of the site and Museum over the next 20 to 25 years. It will mean eliminating or relocating some existing structures/elements that no longer meet the Museum's program requirements to make way for new development and rethinking the overall organization of the site. At the same time the plan must include affordable, incremental and flexible steps that can facilitate implementation.

The following site plan identifies a conceptual strategy for the site that addresses many of the Museum's current challenges. It identifies existing and proposed programming facilities and partnership opportunities, rental and event facilities, collection, exhibit and administrative facilities and opportunities for future development. It also identifies some existing structures that no longer meet the program requirements for the Museum and could be demolished or relocated. Finally it identifies a series of relatively affordable architectural and site interventions that would improve the Museum's overall operations.

One of the central ideas is strengthening the relationship between the Museum entrance and the site. The plan proposes making an opening in the wall of trees that currently separates the Exhibit/Collection Building from the remainder of the site. This intervention would create a visual and physical connection between the Museum's entrance/reception area and the outdoor event space we have identified as the "Museum Green." This would allow the strategic placement of site orientation interpretation at a critical juncture in the site experience and facilitate the day-to-day flow of visitors onto the site. The "Museum Green" would act as a foyer or lobby to the site and the plan reinforces the spacial definition of the Green by identifying an opportunity for development across from the Museum entrance.

The plan also recommends reinforcing the two existing axes on the site with proposed new development and existing buildings. These axes would be terminated with new development that, along with the development opportunity across from the Museum entrance, would become strategically important locations for programming facilities/elements and partnership opportunities.

The areas along the west side of the site and partially wrapping the south and north edges have been identified for environmental programming purposes because these areas are currently more open and under developed.

A common observation communicated during the interviews was the underutilization and in some cases the inappropriate use of many of the existing historic structures. It was felt that many of these buildings could be adapted and put to better use to help meet the Museum's expanding and evolving program and rental requirements. Part of this strategy would include finding a more appropriate home for the collections currently stored in many of the historic structures.

Two proposed architectural interventions include an addition to the existing Exhibit/Collection Building and repurposing the Mount Joy School for programming activities. An addition to the Exhibit/Collection Building could address a number of the Museum's current operational challenges. It could be used to consolidate staff in a more centralized location closer to the Museum's entrance and exhibit hall and solve the current challenge of staff being divided into two separate locations. It could house the remaining collections that are currently scattered around the site in less than optimal and in some cases very poor conditions. Finally it could house the Museum's exhibit storage requirement that is currently met by renting off-site facilities costing \$20,000 to \$25,000 dollars each year.

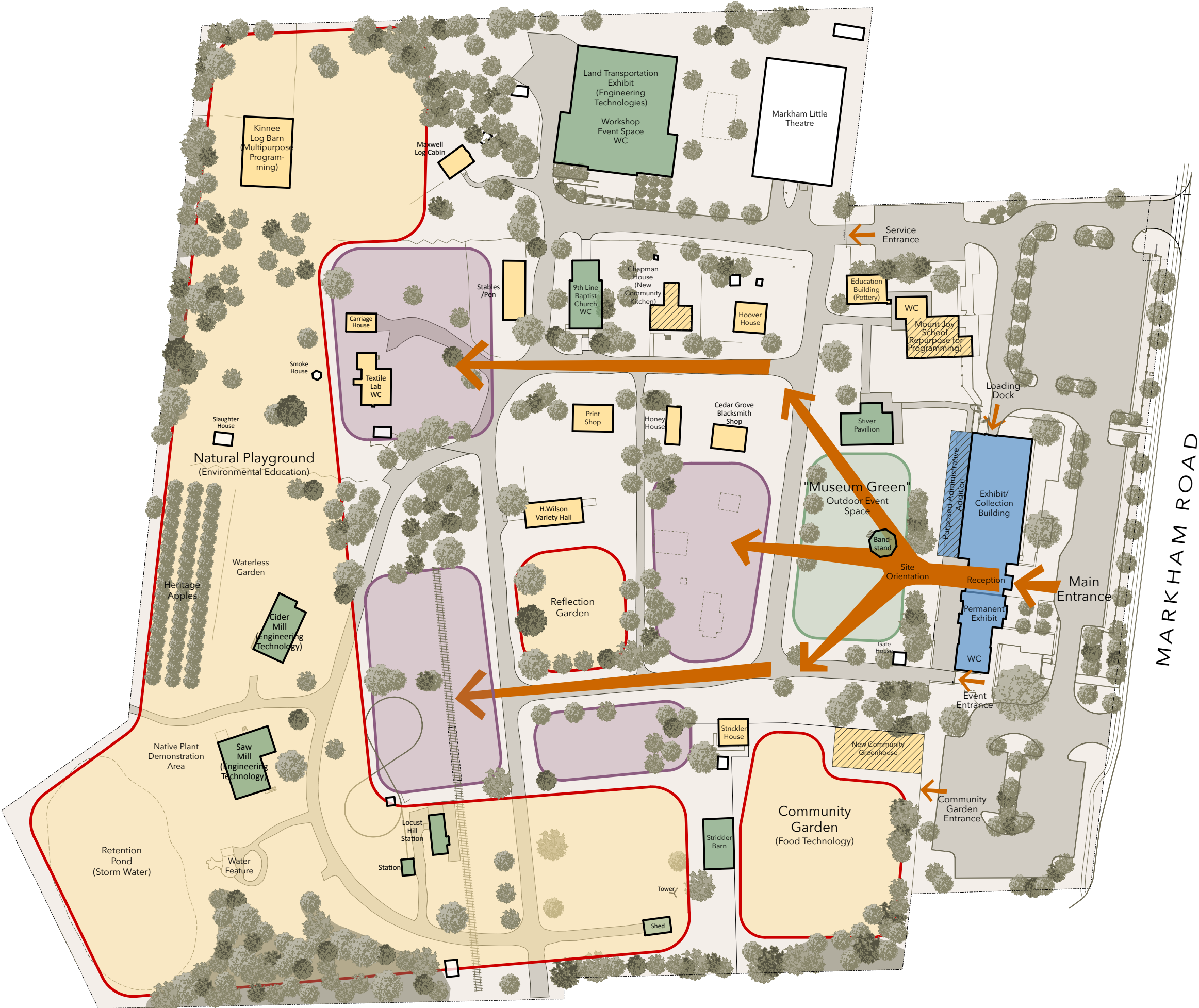
An addition to the Exhibit/Collection Building could also include a remote learning centre in support of a partnership with a local university or college.

The development of a new addition to the Exhibit/Collection Building and the relocation of staff to this new addition would free up the Mount Joy School for other activities. The existing large, open and light filled classroom spaces are ideally suited to housing the Museum's educational programming and rental activities. It would also mean returning the school to the kinds of activities for which it was originally designed.

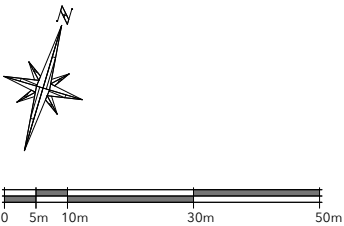
Finally the site plan identifies a couple of opportunities that relate specifically to one of the proposed programming directions offered in the SOF – food technologies. It includes the conversion of the existing Chapman House into a community kitchen, currently being explored by Museum staff, and the creation of a community garden and greenhouse in the southeast corner of the site. The community garden and greenhouse have been strategically located to allow access to the public in off-hours while maintaining security for the rest of the site.

The recommendations outlined in this appendix are intended to be guidelines for the proposed Museum and Site Master Plan. The specifics of these recommendations would be explored in more detail during the preparation of the Master Plan.

MARKHAM MUSEUM – SITE MASTER PLAN OUTLINE



- FUNCTIONAL ELEMENTS
- Programs/Partnership Opportunities
 - Rentals/Events
 - Collection/Administration/ Exhibits
 - Opportunities for Future Development
 - Existing to be Removed or Relocated
 - Proposed Architectural & Program Interventions



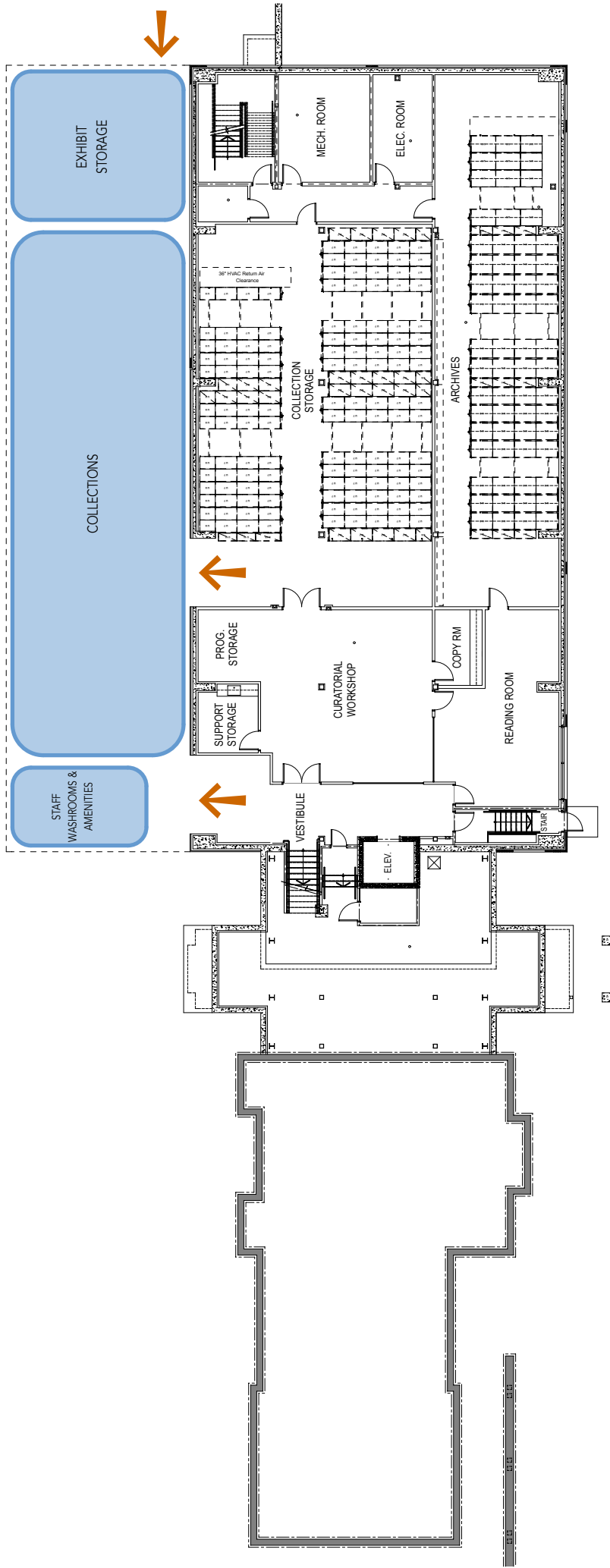
Conceptual Outline: Expanded Exhibit/Collection Building



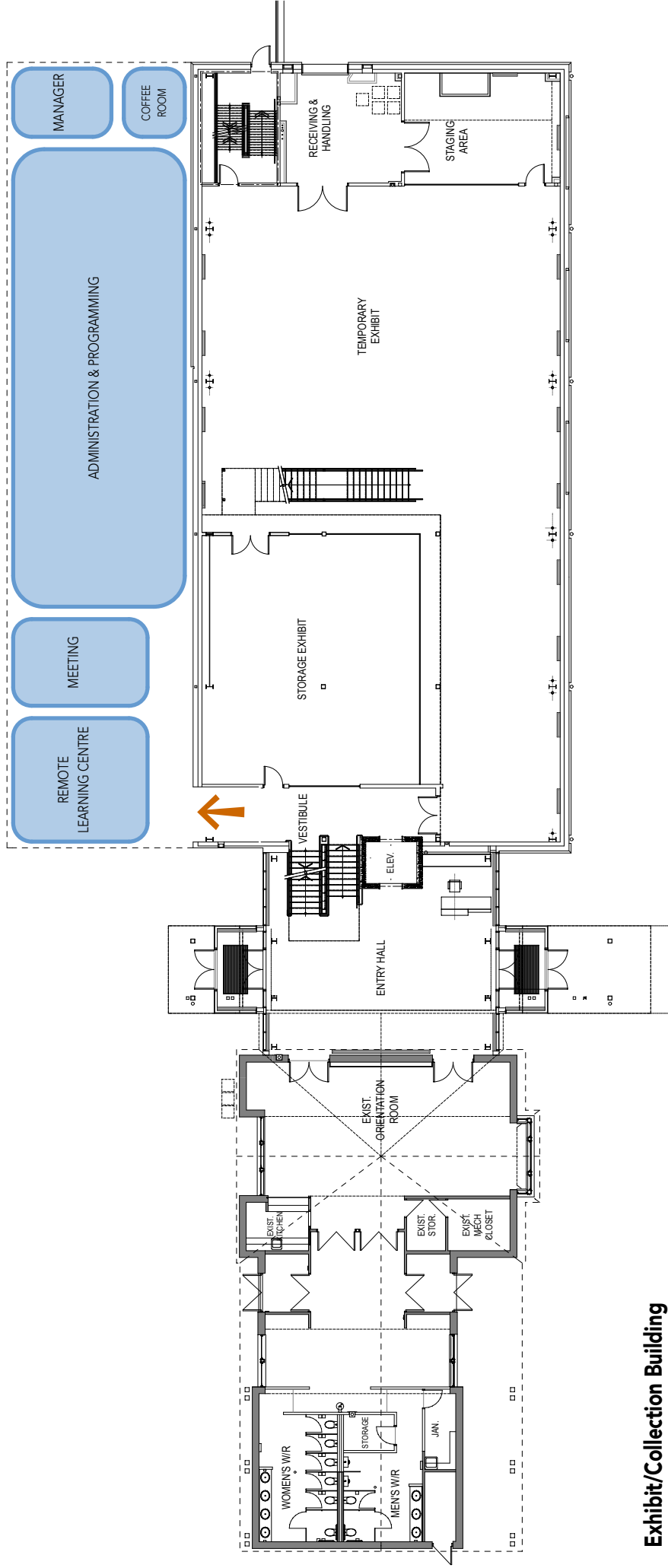
CONCEPTUAL OUTLINE: EXPANDED EXHIBIT/COLLECTION BUILDING

The following conceptual floor plans detail one approach to constructing a new addition to the existing Exhibit/Collection Building. Although there are certainly alternative approaches the purpose of these drawings is to illustrate the possibility for developing an achievable and affordable solution. As outlined in Appendix A this addition would house much-needed exhibit and collection storage space and new and consolidated facilities for the Museum's staff.

In this approach the basement level would house additional collection space connected directly to the existing collection facilities. It would also house exhibit storage in reasonably close proximity to the facility's elevator that connects the basement level to the exhibit hall above. The upper level of the addition would house consolidated staff facilities and offer potential views out onto the site from these facilities. Details as to specific floor area, volumetric, equipment, and facility requirements would be developed as part of the Museum and Site Master Plan.



Exhibit/Collection Building
Basement Level



Exhibit/Collection Building
Ground Floor Level

Suggested Elements to be in MOU with Community Partners



Appendix C

SUGGESTED ELEMENTS TO BE IN THE MOU WITH COMMUNITY PARTNERS

The strategic plan developed here is predicated upon the development of partnerships with a wide range of community groups and organizations within Markham. Three main 'clusters' of such groups were identified: community organizations, cultural groups, and business enterprises. The underlying philosophy of this plan is that partnerships will be forged with these organizations to develop exhibits, programs, activities and events at the Museum. Ideally, in future, **every** special event and exhibition would have a co-sponsor with one or more community organizations.

The Museum will need to develop standards and expectations for such partnerships in order to ensure that they help advance its overall Vision and Mission while at the same time benefitting the partner organization and resulting in a 'win-win' situation. This suggests that a contract or Memorandum of Understanding (MOU) be signed with each potential partner specifying a variety of expectations regarding their participation.

It is recognized that the Museum already has some approach to partnership agreements, but these may tend to be one-off and situation-specific in nature. Given the increased intensity of partnership development that this strategic plan presupposes, it is prudent for the Museum to develop a more rigorous and consistent approach. The following discussion presents a set of suggested principles that should govern any partnership agreement, as well as a list outlining specific elements that should go into any such agreement or MOU. It also comments upon an approvals process that might be appropriate in these circumstances.

Basic Underlying Principles

- The purpose of partnerships is to engage the community in the overall telling of stories relating to the history of Markham, thus demonstrating that the Museum is a community asset - a place where community groups and enterprises can tell their own stories that are relevant to this narrative – this 'democratizes' the Museum as a place where all can become involved in the telling of stories (as opposed to the more traditional and paternalistic approach where the museum curators decided on behalf of the community what the relevant stories to tell should be)
- For the Museum, partnerships must do one or more of the following:
 - a) *further the Vision and Mission of the Museum through the creation of exhibits, programs, events or activities that relate to its core focus areas;*
 - b) *improve accessibility to the Museum (physically or financially); or*
 - c) *further promote and increase awareness of the Museum and its activities.*
- For the partner, the Museum will agree to provide exposure and positive public relations that will benefit their operations

- The partners will be expected to provide either or all of the following in return for availing of Museum facilities: financial resources; in-kind resources; or 'intellectual capital' in the identification and telling of the story
- The Museum will work with the partner organization to identify those elements of the story or activity that most directly tie to the overall Vision and Mission of the Museum; which aspects of the story and presentation methods will be of most compelling interest to visitors, etc.
- The Museum will have total curatorial control over the exhibit, program, event or activity: while the content may result from a dialogue and collaboration with the partner organization, the 'final say' in terms of its expression will reside with the Museum
- Partnerships with Markham-based organizations will be given priority over organizations from outside the community
- Partnerships with organizations that are felt not to enhance the overall image and prestige of the Museum will not be considered; this will be up to the discretion of Museum management and the Department of Culture and Economic Development

List of Items to be Considered Included in a Partnership Agreement

With these basic underlying principles in mind, it is suggested that the following elements be part of any agreement with potential partners. It is also suggested that the Museum take the lead role in developing the MOU, for reaction and eventual sign-off by the partner organization.

Purpose of Partnership: Each partnership agreement or MOU should start with a brief statement as to the purpose of the partnership, and how it relates to the Mission and Vision of the Museum. It is further suggested that this should spell out the benefits accruing to both (or all) parties to the MOU.

Metrics of Success: The MOU should also consider what would be the 'metrics of success' for the particular project being discussed, as appropriate. These may be, for example, attendance at the Museum or the specific exhibition; media coverage for the event; involvement of members or staff of the partner organization; etc. It is suggested that at the conclusion of the activity, exhibit or event, both the Museum and the partner organization undertake an evaluation of its success based upon these metrics, and using a format developed by the Museum (who would keep an on-going record of evaluations of all partner activities). This evaluation should consider what might be changed in hindsight, so that the next time a similar event or activity is offered, improvements might be incorporated. Also, the opportunity might be taken at this evaluation to discuss the next such event to be run with the partner organization.

Time of Partnership: Another area to be considered would be the duration of the partnership in terms of set up, the exhibit of event itself, and tear-down and clean-up activities.

Roles and Responsibilities: This section of the MOU should specify the respective roles and responsibilities of the Museum and the partner organization in the various stages of the event as outlined above.

Resources: This part of the MOU should specify as explicitly as possible what resource requirements are needed for the successful operation of the exhibit or activity (financial, in-kind, staff time, etc.) and which party is contributing what.

Liabilities and Contingency Plans: Any potential liabilities to either organization over the course of the partnership agreement should be identified and the risk assessed. Contingency plans for unforeseen situations and circumstances should be developed as required, if there are significant risks identified (over and above the normal emergency procedures in place at the Museum).

Partnership Matrix

Finally, it is suggested that the Museum and the Department of Culture and Economic Development develop a protocol or set of guidelines that would govern what kinds of partnerships can be approved and pursued within the Museum itself, and which might need to be approved at a higher level.

Level of Partnership	Characteristics
A. Small-scale Partnerships	<ul style="list-style-type: none">• small-scale (e.g. below a certain dollar threshold)• short-term in nature• relatively innocuous subject matter
B. Medium-scale Partnerships	<ul style="list-style-type: none">• medium-scale (e.g. between a certain range of value)• medium or longer-term in nature• anything involving a major employer• relatively innocuous subject matter• any other partnership the Museum Manager wishes to bring to the attention of the Department
C. Large-scale Partnerships	<ul style="list-style-type: none">• larger-scale (e.g. above a certain threshold of value)• medium or longer-term in nature• subject matter is potentially contentious or controversial• any other partnership the Department wishes to bring to the attention of Council

List of Persons/Stakeholders Consulted



LIST OF PERSONS/STAKEHOLDERS CONSULTED

We would like to acknowledge and thank the following individuals for their contributions to this study:

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City of Markham

Mayor Frank Scarpitti, Mayor
Deputy Mayor Jack Heath, Deputy Mayor
Councillor Colin Campbell, Councillor, Ward 5; The Friends of the Markham Museum Board
Councillor Karen Rea, Councillor, Ward 4
Councillor Valerie Burke, Councillor, Ward 1
Regional Councillor Nirmala Armstrong, Regional Councillor
Andy Taylor, CAO
Brenda Librecz, Commissioner, Community and Fire Services
Moe Hosseini-Ara, Former Director of Culture
Stephen Chait, Director, Department of Culture and Economic Development
Diane Macklin, Marketing & Community Development, Markham Public Library
Lorne Smith, City Historian and Markham Historical Society member

The Friends of the Markham Museum

Bill Crothers, Chair
Douglas Worsley, Vice Chair
Martha Mingay, Secretary
Nicole Taylor, Treasurer
G. Randy Barber, Board member; President, Markham Historical Society
Carolina Moretti, Board member, The Friends of the Markham Museum; Former Ward 4 Councillor
Mary Brawley, Board member, The Friends of the Markham Museum

