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## **Oakland Museum of California: Strategic Plan 2014-2019**

### **Inspiring California's Future**

#### Context

2019 will mark the 50<sup>th</sup> anniversary of the founding of the Oakland Museum of California. It is a particularly appropriate “mid-life” milestone to commemorate the evolution of the institution and to consider what the future might hold, with the extraordinary changes for OMCA, for the museum field, and for California that have taken place over the past few years and, even more importantly, that are anticipated for the next decades.

For the museum field, several major societal trends are altering the landscape. Changing demographics across the country demand a profound re-thinking of the audience museums serve and how they create value among communities that may not be consumers of traditional cultural offerings. Here in the Bay Area, changes to the population may have even more dramatic implications. By 2020, it is anticipated that 1.4 million more people will live in the Bay Area than in 1995—a growth of approximately 22%—while California’s population will grow by 53%. The most significant change will be the sharp increase in the number of people 65 and older, where the percentage of the population will nearly double, representing 20% of the population in 2020. By 2020, more than 50% of the people living in our region will be persons of color, and the percentage of Caucasians will fall from 61% to 41% with the Latino population emerging as the largest single percentage. Indeed, projections call for the Latino population to be the plurality in California as soon as 2014. For Alameda County, the diversity is yet greater, with 70% of the population anticipated to be people of color by 2020. At the same time, a number of traditional minority population groups are enjoying growing purchasing power, educational attainment, and technological adoption. These shifts mean that the future sustainability of museums will require fundamental changes in how we think about and serve our communities.

Other dominant trends re-shaping the field at large include the impact of new technologies and changing expectations for leisure-time activity. Some of the trends with the greatest bearing on museums include the use of new media and social channels for communication with attendant consequences including the ease of two-way communication through technology rather than passive receipt of information through traditional media; the increased mobility of technology making learning and connecting available anytime and anywhere; and the seamlessness between virtual and physical experiences now expected by users. In turn, while new technologies have certainly changed every aspect of the cultural experience – from ticketing and data gathering to collection access and learning tools – we’ve also seen a growing desire for the kind of authentic human-to-human connection that a museum can uniquely provide.

Finally, a number of other societal trends are re-shaping the cultural landscape. Audience research throughout leisure time industries reflect the desire – and even demand – for unique, one-of-a-kind experiences that are participatory, customized, and social – a stark change from the more static, formalized, passive, and solitary experience typically identified

with museums. Additional research – including OMCA’s own audience research – also reflects that audiences are deeply interested in learning about different cultures, want to connect their own identity to other cultures, and are seeking distinctive experiences that are also convenient and affordable. Additionally, visitors expect inspiring learning experiences, and for many families, museums may provide a source of arts education that is severely limited in schools, presenting an even greater challenge for developing audiences of the future.

Against this backdrop are the changes OMCA itself has undertaken in the past few years. As the strategic planning process is culminating, the Museum is just completing an eight-year \$63 million capital renovation project and unveiling completely transformed core collection galleries, marking the first time in close to five years that the entire facility is open to the public. The goals and approaches for the galleries were developed in recognition of the broader trends noted above and were explicitly designed to make OMCA a more welcoming, accessible, and relevant cultural facility for a very broad and diverse community. The Museum has also undergone profound organizational change with the transition from the City of Oakland to independent governance and operation in 2011, with a planned and substantial decrease in public funding over a ten-year period. This transition from the City coincided with the complete restructuring of the staff organization with the intent of truly placing the visitor at the center of the institution and breaking down the traditional silos of discipline, function, and expertise that have defined most museums for more than 100 years. Thus, while OMCA is approaching its fiftieth anniversary, it is in some ways, a start-up organization with the need to evolve and mature many of the existing structures, systems, and the culture itself.

This strategic plan, then, comes at a time of momentous and accelerating transition at all levels for OMCA – and it has galvanized a robust and inclusive institution-wide effort to consider its future in the context of broader cultural trends. Indeed, considering the future catalyzed a whole new way for the Museum to approach its purpose – moving from a focus on the past to inspiring a future vision of California. This seemingly subtle shift truly became a game-changer for how we’ve looked at our mission, vision, and day-to-day work itself in consideration of that fundamental question: To what end? We believe that the goals outlined in this document are the roadmap to answer that question, knowing that these answers will continue to evolve and change as the future itself unfolds.

### Process

This strategic planning process launched in September 2012 as a partnership between the Board of Trustees, the staff, and volunteer representatives of OMCA together with Olive Grove Consulting. The overall planning process was coordinated through the Strategic Planning Committee, comprising four trustees and four members of the senior staff, and was supported by the Strategic Planning Advisory Council that included representatives of all the Museum volunteer stakeholder groups plus three additional staff members and three trustees.

The plan progressed through three phases: discovery, discernment, and decision-making. The first phase cast the net broadly as we examined what the future of OMCA might entail. We held small discussion groups of staff around key themes, conducted a community-wide survey on important issues facing the Museum, and researched other model institutions to benchmark our work against key indicators for similarly sized museums. The discovery phase culminated with a Thought-Leader Convening for Board, staff and volunteers with four nationally recognized experts in philanthropy, community engagement, enterprise, and technology.

The process then moved into discernment as the Board and staff leaders began to focus on specific directions and put “stakes in the ground” around key concepts. The milestone for this phase was the Board retreat in March 2013 that included in-depth discussion around the themes of: 1) focus on the future; 2) the Museum as a “third space;” and 3) the Museum’s role as a statewide resource. In addition, we have continued throughout the process to consider the financial model and long-term capitalization needs that would underpin the plan.

The final phase of decision-making involved small working teams expanding broad goals into more specific strategies, priorities, and performance indicators. The plan’s outline of four major goal areas with four “foundations of organizational success” were articulated and the financial model was more fully developed to set broad parameters for the Museum’s growth between 2014 and 2019, as well as targets for all areas of revenue. During this process, it became clear that in order to maintain the excellence and vitality of our visitor experience, programs, educational resources, and collections care and access would require that we build fundraising capacity, maximize and increase earned revenue sources consistent with our mission and brand, and build endowment and other investment income to secure our future.

Our experience over the last few years has certainly made clear that we cannot anticipate every new challenge, opportunity, or development that our future holds. Therefore, the intent is for the plan to evolve over time, to become the basis for more in-depth operational plans and annual priority setting and budget development, and to be as flexible and responsive as we know the Museum must be to be sustainable. As the artist Hung Liu said about the word history, we see this plan, not as a noun, but as a verb.

**Mission:** To inspire all Californians to create a more vibrant future for themselves and their communities.

**Vision:** OMCA is the heart of a thriving community and a statewide leader.

**Values:** These values are fundamental to our institutional culture and guide our work together:

*Excellence:* We are committed to excellence and working at the highest standards of integrity and professionalism.

*Community:* We believe everyone should feel welcome and part of our community, both within the Museum and with our visitors and neighbors.

*Innovation:* We embrace innovation and calculated risk-taking to achieve our mission.

*Commitment:* Our work at the Museum demonstrates a sense of purpose and a shared accountability for the institution's success.

**Goal # 1: OMCA creates relevant experiences that diverse audiences value.**

OMCA places the experience of our visitors at the very center of our mission, values, and organizational structure. We believe that creating transformative experiences that have real meaning in the lives of our visitors – and our ability to communicate the personal relevance of these experiences – will enable us to attract audiences that reflect the changing demographics of California and the extraordinarily diverse community of Oakland and the Bay Area.

- 1.1 Create and deepen Museum experiences through a wide variety of platforms and venues – on-line and in the community as well as in exhibitions, collections, public programs, publications, and enterprise activities.
- 1.2 Catalyze dialogue on urgent and compelling issues in California, inspiring action for the state's future that is grounded in an understanding of our history and heritage.
- 1.3 Expand and engage audiences that reflect the changing demographics and multiple visitor motivations of our community.
- 1.4 Activate the entire Museum campus as a space for learning, socializing, reflection and community exchange.

**Goal # 2: OMCA connects with diverse partners to respond to community needs and to inspire California's future stewards, citizens, creators, and innovators.**

Since its founding, OMCA has been a civic institution committed to serving as an educational resource for a broad and diverse community. This commitment is reflected in its service to some 40,000 school children each year, and in the long-standing involvement of ethnically based community advisory councils which have helped create and develop some of the Museum's most well-known and beloved public programs. While the focus for community engagement and education has historically been on attracting visitors to the Museum and ensuring accessibility and inclusion for a diverse visitorship, the Museum is now extending beyond its own walls to directly respond to the needs of communities – from local neighborhoods, to schools throughout the state, to a global audience engaged through virtual means – and to help shape a more creative and sustainable future for our city, region and state.

- 2.1 Extend beyond the Museum walls to understand community needs and partner with other organizations and networks to create a more vibrant Oakland.
- 2.2 Understand and incorporate community needs in all areas of Museum exhibitions, collections, on- and off-site programs, and audience development efforts.
- 2.3 Address the critical educational needs of students and teachers as a local, regional, and statewide resource that links California content to 21<sup>st</sup> century learning skills and curriculum standards.
- 2.4 Create fee-based learning programs to meet the specific needs of target audiences.

**Goal # 3: OMCA utilizes its collections to share the stories of California's past, present and future with communities around the world.**

OMCA's collections include 1.8 million objects ranging from fine and decorative arts to historic and cultural artifacts and natural science specimens. While basic information exists in our collections database for most of these objects, a much smaller portion have adequate documentation and less than 3% are currently available on-line. Less than 1% of our holdings are on view in the Museum galleries or on loan to other institutions. Further, while the Museum's collection is deep in a number of areas reflecting California's heritage, it does not fully incorporate new trends, populations, or creative developments that reflect California's present and potential future. Our focus for the coming years is to rigorously strategize future acquisitions to better reflect the Museum's mission and goals, and to pursue expanded platforms to make OMCA's collections – and related stories, content, and related data – not only available, but meaningfully accessible, to worldwide visitors and users.

- 3.1 Strengthen the collection to align with the Museum's future-focused mission and reflect the current issues and changing demographics of California.
- 3.2 Expand collaborative and multi-platform access to the Museum's collections and related content.
- 3.3 Ensure collection policies and procedures support the visitor-centered mission, vision, and values of the institution while meeting the highest level of integrity and standards in the field.
- 3.4 Increase the collections research capacity of the Museum by developing collections access, education, and research environments in and between galleries and back-of-house spaces.

**Goal # 4: OMCA achieves the financial and organizational capacity to ensure our future presence and influence in California.**

The Museum's 10-year grant agreement with the City of Oakland stipulates that City funding will reduce from \$5 million, or 37% of the Museum's budget, in the first year of the

agreement (2012) to \$3 million, or an anticipated 20%, of the Museum's budget by 2019. This fundamental change in the business model will require a commitment to securing substantial new resources – contributed, earned, and investment income – and to prudent fiscal management. At the same time, the transition from the City has meant that in many ways OMCA is a start-up organization with the need to put in place new organizational capacities, particularly in human resources, technology, and policies and procedures. The strategies below are focused on improving the Museum's financial capacity; goals and strategies for building organizational capacity in other areas are outlined in the Foundations of Organizational Success.

- 4.1 Achieve a sustainable balance of contributed, earned, and public annual operating income.
- 4.2 Enhance Museum's long-term capitalization with expanded endowment and identified reserve funds for facilities, capital, and operations.
- 4.3 Ensure rigorous cost containment and operational efficiencies to match available resources with Museum goals.
- 4.4 Ensure necessary policies, procedures and systems are in place to guide efficiency in operations, meet legal and compliance requirements and assign accountability for implementation, deployment and oversight.