

NATIONAL MUSEUM
OF BERMUDA

Strategic Plan 2016–26



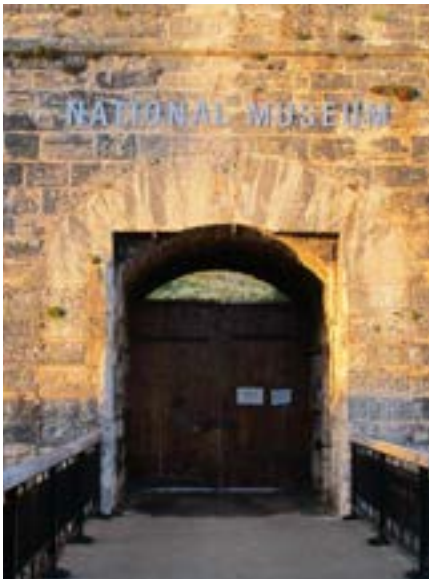
**NATIONAL MUSEUM
OF BERMUDA**

Strategic Plan 2016–26



Contents

A	Introduction	4
B	Implementation & Review	7
C	Mandate	7
D	Vision	7
E	Core Values	8
F	Strengths & Weaknesses	8
G	Core Areas	9
H	Strategic Objectives	10
	Strategic Objective 1	11
	Strategic Objective 2	12
	Strategic Objective 3	13
	Strategic Objective 4	14
	Strategic Objective 5	15



A

Introduction

The National Museum of Bermuda is a non-government, not-for-profit Bermuda Registered Charity (No. 136), created by the Bermuda National Trust in 1974 as the Bermuda Maritime Museum. In 1975, the Museum opened to the public and three years later, a Private Act of Parliament formally established the Museum to promote, collect, preserve, research and exhibit Bermuda's maritime history and restore the buildings of the Keep Fort.

Over the years, the Museum's scope has expanded to encompass more than maritime history. Today it is a vital custodian of Bermuda's tangible history and a champion for the preservation of Bermuda's underwater and land-based cultural heritage.

In 2009, the Government of Bermuda recognised the Museum's national role with a change of name, formalised in December 2013 with the passage of the Bermuda Maritime Museum Association Amendment Act 2013, which officially created the National Museum of Bermuda. The Act also brought the remaining Dockyard fortifications under the Museum umbrella, including Casemates Barracks and the Northwest Rampart.

With the new Act passed, a sub-committee of the NMB Board of Trustees—the Strategic Planning Committee—was formed in early 2014. It was tasked with guiding the planning process and developing a strategic plan to steer the Museum through its next phases of development and incorporate its expanded scope.

The Strategic Planning Committee consisted of eight Trustees and the NMB Executive Director and Curator, who also engaged Dr. Julie Dunstan for her strategic planning expertise and advice and experience with survey analysis. The objective was to create a streamlined document for staff and Trustees defining the Museum's vision, mandate and core values; outlining the strategic objectives for the next 10 years; and setting one-year, five-year and 10-year priorities, actions and goals.

Consulting the local community and major stakeholders was an important component of the process—it was vital to get their input to help shape the future direction of the Museum and ensure its viability. A series of surveys was devised targetting the general public (including users and non-users of NMB), Museum members, visitors and major stakeholders to get their opinion on how the Museum is doing, what it could do better and what it should be doing in the future. Focus group discussions with Trustees, donors and NMB staff were also essential in shaping the final document. We thank everyone who participated and provided invaluable feedback and thank KPMG for hosting the major stakeholder online survey and Dr. Julie Dunstan for her donated hours.

Rees Fletcher

Chairman, NMB Strategic Planning Committee

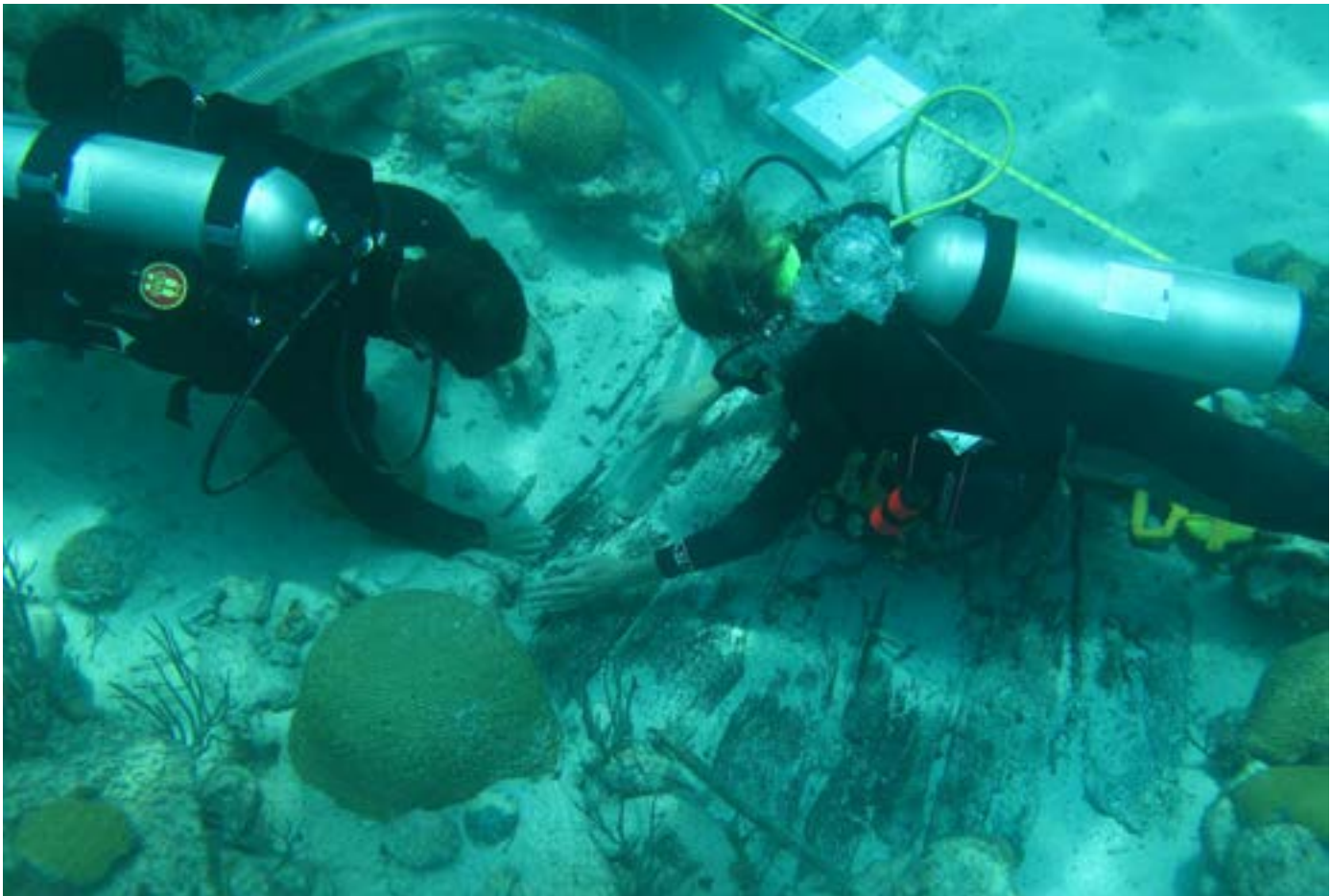


ROBERT STEINHOFF FAMILY GALLERY



Ship of
A...





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Implementation & Review

It is the responsibility of the Board to ensure that the Museum follows the Strategic Plan and that it is regularly used, reviewed, assessed and evaluated. The Strategic Plan is a living document, which will be modified annually when goals and actions are reached.

Schedule for reviewing the Strategic Plan:

Annually:

- The Actions

5 years:

- NMB Core Values
- The Strategic Objectives
- The Strategies

10 years:

- The Museum Vision and Mandate
- Core Areas



C

Mandate

NMB actively promotes the preservation, understanding and enjoyment of Bermuda's cultural heritage through education, stewardship, historical, archaeological and scientific research, exhibition, acquisition, public outreach and advocacy.

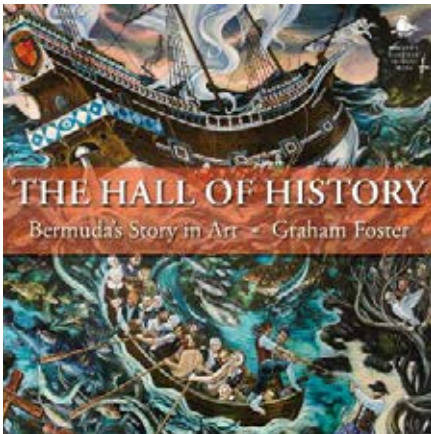


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Vision

NMB aspires to be a first-class national museum and research facility, inspiring engagement with and protection of Bermuda's diverse cultural heritage.





E

Core Values

The Museum's mandate is guided by its core values, which help to inform decision-making, strategy and actions. NMB as an organisation is committed to the following:

Inclusiveness: to be inclusive of multiple perspectives; reflect the diversity of Bermuda's cultural heritage; be accessible to our diverse audience; and recognise Bermuda's history as an encompassing multi-faceted story involving multiple groups of people and their experiences

Relevance: to be relevant to our local and global context and our diverse local and visitor communities

Engagement: to engage the local community and create exhibitions, programmes and publications that spark curiosity and a sense of discovery

Integrity: to be honest, ethical and fair, and to demonstrate those values in all aspects of Museum practice, governance, and internal and external relationships

Excellence: to provide an excellent visitor experience, customer service, scholarship, and education programming; follow museum, archaeological and preservation best practice; and establish high standards for everything we do

Sustainability: to manage the Museum's resources to ensure its long term viability

F

Strengths & Weaknesses

The following are the perceived strengths and weaknesses of the Museum as identified by the community, major stakeholders, donors, Trustees and NMB staff following extensive consultation through surveys, discussions and focus group sessions.

NMB strengths include:

- The preservation of Bermuda's heritage
- The Museum collection
- Effective restoration and stewardship of the Museum's historic property
- Historic, archaeological, and museum expertise
- Trustworthiness
- Staff
- The fiscal management of the Museum
- Collaboration with other institutions and facilitation of research

NMB weaknesses include:

- Lack of a full-time designated educator
- Community engagement and perceived lack of inclusiveness
- Marketing and promotion
- Collection storage nearing capacity

The strategic plan is designed to build on the Museum's strengths and target the areas identified as weaknesses.

G

Core Areas

The surveys and consultation revealed that the Museum should be concentrating on five core areas:

- Preservation of cultural heritage
- Interpretation of cultural heritage
- Education and advocacy
- Research leadership
- Cultural tourism

These are five areas the Museum is already actively engaged in, and they directly align with the principal purpose of the Museum outlined in the Museum's Act of Parliament. The results of the surveys validate the direction the Museum has taken over the past 40 years, but they also reveal that there are key areas that the Museum needs to address and improve, such as inclusiveness, community engagement and education. It is through the strategic plan that the Museum will address the issues and weaknesses raised by our stakeholders and users and build on its current strengths.





Strategic Objectives

The strategic objectives were devised by considering the five core areas; the input from the surveys and community consultation; our audience; and other areas of museum practice such as collection management and care. Within the Strategic Objectives are strategies for reaching the objectives as well as actions to be carried out within one year, five years and 10 years.

NMB Strategic Objectives:

- 1 Be a must-see museum**
- 2 Strengthen local engagement in the enjoyment and protection of Bermuda cultural and historic assets**
- 3 Strengthen stewardship of the Museum's cultural assets**
- 4 Increase institutional stability and resilience to ensure longevity**
- 5 Facilitate research and advocate the preservation of Bermuda's history and cultural heritage**



1 Be a must-see museum

Relates to developing and promoting the NMB product and brand and developing and expanding our audiences, with the goal of becoming a “can’t miss” part of the Bermuda experience

Strategy	1-year actions (2016)	5-year actions	10-year goals & actions
a) Ensure top-of-the-mind awareness and strong word-of-mouth promotion among locals and visitors	• Launch the new NMB website with e-commerce • Identify people and processes to define and direct marketing and PR objectives • Develop a new marketing, promotion and PR strategy incorporating a variety of media, addressing global and local markets with professional input • Expand social media outreach	• Implement a new marketing, promotion and PR strategy	• NMB is the must-see Museum on the Island for locals and overseas visitors
b) Ensure a first-rate visitor experience, from initial impressions to on-site experience: welcoming, relevant, informative, comfortable, easily navigated, and enjoyable	• Conduct customer service training with relevant staff, in particular the Ticket Office • Develop plan to reinvigorate key areas and exhibits to maximise America’s Cup visitor experience	• Analyse the visitor experience and make a plan to address shortfalls in customer service, quality and scope of facilities, and ease of navigation and orientation • Implementation of America’s Cup visitor experience initiatives	• NMB offers a first rate Museum experience and customer service
c) Re-invigorate core product by refreshing and replacing tired exhibits and ensuring that new exhibits are engaging and reflect the diversity of our overseas and local visitors	• Start to develop a 10–15 year master exhibit and interpretive plan that reflects diversity of Bermuda and local/overseas visitors • Construct the longtail rookery at Bastion E (Grundy Bastion) • Install the large Stempel Gun at Bastion E • Create interpretative plan for the new exhibit <i>Into Local Waters</i>	• Master Plan completed and being used • Replace all damaged or deteriorated panels in permanent exhibitions as needed • Install new exhibition <i>In Local Waters</i> and reopen Boat Loft	• Continuation of Master Plan initiatives • Install new exhibitions and reopen Shifting House (<i>The Royal Navy & Bermuda</i>) • Build new wing on Boat Loft and install second phase of <i>In Local Waters</i> exhibition • Continue restoration and arming of the Keep, North West Rampart and Casemates
d) Find ways to encourage repeat visits by refreshing and changing the product regularly in ways which do not involve long-term preparation and high expense	• Revive rotating exhibitions in the Elliott room using the Museum collection, the Elliott collection and collections borrowed from other local institutions	• Have an established three-year schedule of rotating exhibits for the Elliott Room • Identify, plan and raise funds for creation of a larger temporary exhibition space • Investigate partnerships with local and overseas cultural organisations using the museum as a venue	• Schedule of temporary exhibits in place and under way • Regularly refresh rotating components in permanent exhibitions

Related key performance indicators: site visitor numbers and demographics (including schools), visitor satisfaction levels, collection display data, website and social media stats, awards and mention in travel publications

2 Strengthen local engagement in the enjoyment and protection of Bermuda cultural and historic assets

Relates to building connections with the local community and advocating for preservation of and engagement with cultural and historical assets through education and related programming

Strategy	1-year actions (2016)	5-year actions	10-year goals & actions
a) Establish education programming as a core function of the Museum	Fundraise for a museum educator and start to identify possible candidates	- Advertise & hire an educator - Develop and implement an education plan tied into the schools curriculum - Develop school resources section of website	- Construct new Education Centre in Keep Yard - Have a well developed first-rate museum education department that has programming targetting ages from four to seniors
b) Increase community involvement in NMB	- Launch membership campaign targetted at locals - Establish a community advisory board for upcoming exhibit <i>Into Local Waters</i>	- Develop/implement marketing strategy that promotes/connects with the local community - Assess viability of a docent programme - Ensure that community advisory boards are part of Museum policy in exhibition development and that community involvement is built into the development of new Museum products	- Have an established docent programme and volunteer programme - Have a well established network of community advisors and significant community involvement in the Museum
c) Develop products which reflect the diversity of Bermuda's cultural heritage	- Start to develop the 'Cultural Gems' website to highlight the Bermuda cultural assets that can be accessed by the public and visitors - Develop interpretative plan for the exhibit <i>Into Local Waters</i> and ensure that the new exhibit is representative of the diversity of Bermuda's cultural heritage	- Develop community engagement programmes targetting families and people who do not visit museums - Create exhibits that reflect the diversity of Bermuda's cultural heritage, including exhibits relating to post-Emancipation black life	NMB is considered to be inclusive in its range of products and locals feel represented in the Museum

Related key performance indicators: increased local membership, local visitors and students

3 Strengthen stewardship of the Museum's cultural assets

Relates to the use, preservation and care of NMB's historic buildings and collections, and the behind-the-scenes aspects of collection management, both physical and intellectual

Strategy	1-year actions (2016)	5-year actions	10-year goals & actions
a) Update and develop policies and procedures for collections management which meet international best practice standards	Complete and submit more than half of the core documents required by American Alliance of Museums	- Submit all the core document requirements for the initial stage of accreditation to the American Alliance of Museums and prepare for full accreditation process - Draft a Collections Development Plan setting out collecting priorities, including the filling of gaps in the collections to better reflect Bermuda's diverse culture and history	Receive accreditation by the American Alliance of Museums
b) Develop policies and procedures for site and buildings management which meet international best practice standards	Start to draft site management documents to include a policy which takes into account the historic nature of the property, a plan for long-term development, and a schedule for long-term maintenance	- Complete and implement the site management policies and maintenance schedule - Complete the long-term development plan	
c) Upgrade care of collections	- Upgrade existing Curatorial storage areas and offices - Identify collections for re-housing - Estimate annual requirements for artifact housing to build into budget - Hire a contract conservator to complete conservation of the remaining Warwick artifacts	- Design new Curatorial Storage facilities and raise funds for construction - Hire a contract conservator for specific projects, particularly for upcoming exhibits - Fundraise for a part-time Museum conservator	- Construct a state-of-the-art Curatorial storage facility - Construct new Curatorial storage facilities for oversized objects
d) Restore Casemates	- Start to develop a master plan for Casemates - Carry out work on the improvement of the roofs of the adjacent buildings in Upper Yard - Start to develop a capital campaign plan for raising funds	- Continue creating the master plan for Casemates and start the design process - Implement the capital campaign plan for Casemates	Major construction work underway on Casemates and some areas open to the public

Related key performance indicators: documents produced, accreditation stages, amount of artifacts rehoused and conserved

4 Increase institutional stability and resilience to ensure longevity

Relates to the need to be sustainable in all aspects of the Museum's operations, in particular to be fiscally resilient and strong to ensure institutional longevity

Strategy	1-year actions (2016)	5-year actions	10-year goals & actions
a) Develop new revenue streams and enhance existing to improve cash flow for operations	• Work with Museum Services/MEF to promote and market facilities to increase facility rental bookings • Research products to develop for sale at Dolphin Quest shop and website. Provide current publications for new DQ shop	• Examine and partner with commercial opportunities aligned with the Museum's mission • Find new ways to promote and market facilities rentals to increase bookings	• Revenue streams are diverse and reliance on Museum ticket office revenue is reduced • Have financial security
b) Create a sustainable structure for generating philanthropic donations	• Advertise and start hiring process for a development officer • Update and enhance donor database	• Develop a fundraising plan to carry out the aims outlined in the NMB strategic plan, including growth of the endowment • Establish an infrastructure for prospect identification and development, membership management and other activities such as annual giving, etc.	• Endowment assets increased to \$25 million
c) Ensure business continuity	• Carry out succession planning for key positions • Review security and backup systems for all digital assets • Review insurance policies and alternatives • Develop tactical plan to meet budgetary requirements	• Establish a business continuity plan for all areas of operations to ensure that critical functions can continue during and after a disaster • Establish a disaster recovery plan for non-curatorial areas of Museum operations	
d) Identify long-term and ongoing costs	• Identify ongoing and long-term maintenance and renewal costs and schedules for all buildings, property and infrastructure systems • Identify ongoing and long-term conservation, care of collections, housing and other costs relating to the museum collections • Develop a comprehensive five-year financial plan	• Ensure that the budget reflects the needs of the ongoing and long-term infrastructure maintenance schedule • Ensure that the budget reflects ongoing and long-term curatorial department operational requirements for supplies and equipment	
e) Become more 'green'	• Continue the transition to energy efficient appliances and LED lights (and other means to save energy) • Develop a 'green' policy	• Investigate the cost of installing solar panels and other methods to become more 'green'	• Increased utilisation of efficient renewable energy sources

Related key performance indicators: increase in sustainable revenue, reliance on renewable energy and use of energy efficient methods

5 Facilitate research and advocate for preservation of Bermuda's history and cultural heritage

Relates to the development of strategies to build on the Museum's role as a national leader in preservation and scholarly research

Strategy	1-year actions (2016)	5-year actions	10-year goals & actions
a) Advocate at the national and community level for practices, policies and legislation that promote preservation	• Nurture relationships with sister organisations • Continue laying groundwork for listing Dockyard as a World Heritage Site	• Respond and advise on plans, threats and proposals related to Bermuda's cultural and historic heritage • Continue work on World Heritage Site application for Dockyard • Ensure representation on related advisory boards and advocacy groups	• Have Dockyard designated as a World Heritage Site
b) Partner with government and local and overseas organisations to facilitate management of Bermuda's cultural resources	• Continue working with BNG and BNT on cultural heritage matters • Establish a partnership with Jeremy Madeiros, Conservation Services, with the scientific study of the longtails inhabiting the Museum's cliff and rookery at Bastion E • Bermuda Intact Shipwreck Project	• Partnership with WEDCo for preservation of historic dockyard and naval sites	• The Museum is the leader in the management of Bermuda's cultural heritage assets
c) Serve as a resource for understanding Bermuda's diverse history and people	• Launch Hallett genealogical website project • Create a publication timeline	• Continue NMB Press academic and popular publications, concentrating on diversity • Make NMB publications website available	• The Museum is the go-to place for local and overseas researchers as the leader and expert in Bermuda's cultural heritage
d) Partner with local and overseas universities and organisations to facilitate and carry out research	• Continue working on current collaborative research projects: Kast Ruin; Empire, Trees and Climate; Company Ships; Iron Plate Wreck	• Establish the Atlantic World Institute for Maritime Archaeology and History in partnership with overseas universities	

Related key performance indicators: research, restoration and preservation projects completed



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