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June 13, 2018

Fundraising Needs Assessment and Action Plan

Summerland Museum and Archives



From Summerland Chamber of Commerce (www.summerlandchamber.com)

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I. Summary

It is fitting that this Fundraising Needs Assessment and Action Plan for Summerland Museum and Archives was made possible by the B.C. Rural Dividend Program. This two-phase plan promises to pay dividends to the museum, and to all citizens of Summerland, with its long-term, much-needed focus on development.

“Only fundraising has the ability to create more money, not just for programs, but even for the other elements of capacity building,” Dan Pallotta said in Harvard Business Review. “It’s the difference between, as George Overholser has said, buying something (capacity) and building something (revenue streams).”

This plan identifies **four areas of need** if the museum is to build relationships and become more accessible and sustainable:

- Creative Partnerships
- Consistent Processes
- Compelling Promotions
- Committed People

Reliable people and processes increase the museum’s fundraising capacity while rewarding partnerships and promotions inspire the community’s support. Immediate actions to address these needs will happen through the final six months of 2018. Actions requiring further consultation, planning and resources will fill future calendars of the plan. Every effort will be made to align these activities with the museum’s new Strategic Plan, the District of Summerland’s Cultural Plan, and the B.C. Rural Dividend Program’s objectives.

In submitting an application for B.C. Rural Dividend funding, the museum identified as its first priority improving operations and increasing staff hours. The fundraising target for 2018 is net \$25,000, covering that first priority. That target needs to double through the plan’s first full calendar year, 2019, and track at net \$75,000 per year as the priority shifts to expanding or renovating the museum.

Targets for this plan are \$300,000 in total funds – a healthy return on project development funding of up to \$10,000 – and redistribution of museum revenue to 60-20-20. The museum will continue to support other community groups in their events and fundraising initiatives. In the museum’s Spring 2018 newsletter, President Kay Treadgold summed up the museum’s overarching need if is to offer more meaningful access to history for the entire community.

“We need all the help we can get to maintain the staff, the collection, and the programs as well as increase our contribution to the community of Summerland,” Treadgold wrote.

II. Observation

Enter Summerland Museum and Archives and there is an open guestbook. Midway through May, guests notice two parties have signed in this month to see some artifacts, pioneers and stories that made Summerland as resourceful as it is beautiful.

The guests will explore only some of our history at the museum, since much of it is in storage due to limited resources and space. One of the promising professionals on staff stops her task at hand to warmly greet the guests, answer questions and wish them well on their tour. "Take Your Time," Summerland suggests to its visitors.

When the guests begin to pass museum exhibits, they read how laundry was done on "Blue Monday" and how tent houses were constructed. They

may say to themselves, "not big, but packed," as one TripAdvisor reviewer described the museum. The guests may not

'Despite many of its members being seniors, it is sadly inaccessible to guests with limited mobility.'

even venture upstairs, where a beloved model of the Kettle Valley Steam Railway is stationed.

The guests soon arrive at a replica interior of a homestead filled with precious items from a formative period in Summerland's history. Dangling from the ceiling of the homestead is a lantern, casting all the light it can into a wooden exhibit, and a windowless main floor, that is no doubt worth exploring.

The lantern is a symbol of Summerland Museum and Archives as both have become outdated. Purpose-built in 1984, the museum fails to meet modern standards for memory institutions in Canada. It is unable to properly safeguard our community's collection, let alone exhibits that might otherwise come to Summerland on loan from other historically rich districts. Despite many of its members being seniors, it is sadly inaccessible to guests with limited mobility.

Summerland Museum and Archives is spinning its wheels trying to meet its mission and not speeding toward its vision as "a place of passionate exploration of Summerland's history." With the latest technology and training offering new ways of learning about and sharing "the good old days," the museum has an opportunity to become a centre of innovation and a source of inspiration in Summerland's downtown "smart park."

What it needs, as it looks to create to a brighter future for the community, is generous, ongoing support from residents and visitors. Finding and earning that support is this plan's purpose.

Chad Douglas
Fundraising Consultant

III. Current Status

Fiscal

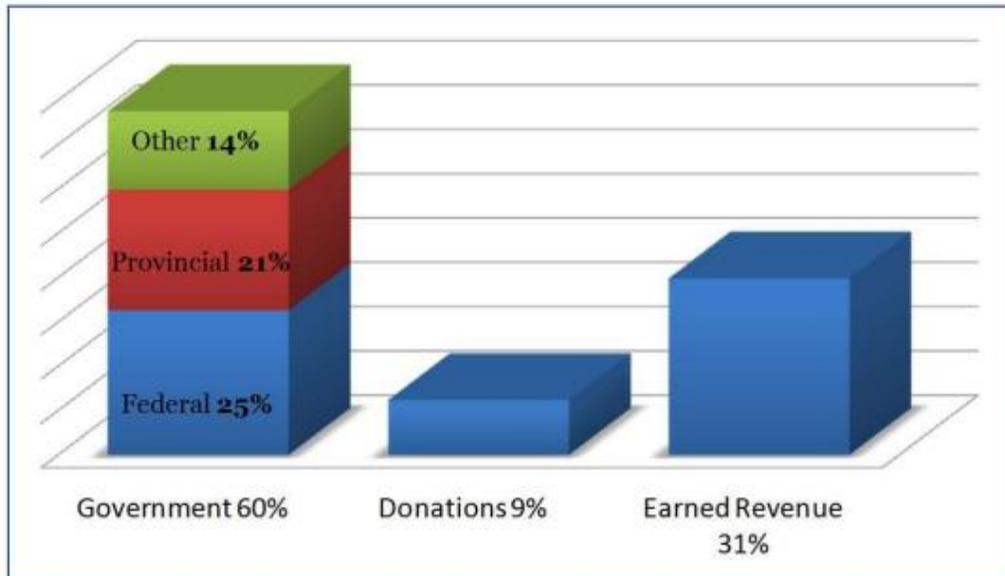
Summerland Museum and Archives is weakening. Financial statements for the past five years (2013-2017) show the museum becoming more dependent on grants to maintain its operations and spending nearly twice as much on wages and benefits.

The museum's working capital ratio, which reflects its ability to pay its bills, fell to 2.5 from 12.6 in 2017. Its \$14,043 in unrestricted funds at the end of the year was enough to cover less than two months of operations. After reporting **a deficit of \$36,218 in 2017**, the museum must adopt an organizational focus on fundraising to fulfill its mission. Jenny Gibbs of Sotheby's Institute of Art in New York said it best: "Without margin, there is no mission. Staying profitable is the only way for a museum to keep its mission alive."

Government grants, the largest being an annual \$40,000 grant from the District of Summerland, made up 88 percent of the museum's \$72,191 in revenue in 2017. By comparison, grants were 64 percent of \$86,273 in revenue in 2013. The museum no longer counts as revenue in-kind services from the District (which reached as high as \$19,723 in 2014) and no longer collects as much in private donations. After coming in at 10.5 percent of total revenue in 2014, donations of \$2,154 contributed just three percent of total revenue for 2017.

Sales and services was no longer listed in museum revenue for 2017, after supplying \$2,358 through 2015. The standard for museums, according to Canada Museums Association (CMA) and its The State of Museums in Canada, is earning 31 percent of revenue. Governments provide 60 percent of revenue and donations provide nine percent. While the standard for revenue distribution is 60-31-9, Summerland is less balanced at 88-9-3.

Typical Sources of Financial Support for Canada's Museums:



From Canadian Museums Association (museums.ca)

On the other side of its ledger, the museum paid more for staff in 2017 than it posted in revenue. Wages and benefits amounted to \$78,903, or 73 percent of the museum's \$108,409 in expenses. By comparison the museum spent \$42,535 on wages and benefits, or about half of \$86,404 in expenses, in 2013. Wages and benefits have increased by 86 percent over five years, during which time the museum's investment in professional development, as a percentage of wages and benefits, decreased by two percent.

Considering Leadership and Excellence is among its core values, and staff turnover has stunted its development, the museum must enrich training for emerging museum professionals and energetic volunteers. The HR Council for the Nonprofit Sector reported in The Current State of Skills Development in 2011 that small organizations saw training in **strategic leadership, finances and fundraising and marketing** becoming increasingly important. These organizations spent an average of \$1,000 per employee on training each year, whereas Summerland spent a total of \$1,100 in 2017.

As much as its vision to become "a place of passionate exploration" depends on commercial front-of-house exhibits, programs, sales and tours, the museum's mission "to collect, preserve, research, interpret and display" demands back-of-house expertise from staff and volunteers. As the CMA insists, "without

curators and specialists able to understand and interpret museums' collections, museums are nothing."

TAKEAWAYS: *To meet national (CMA) standards, the museum needs to collect more private donations and eventually come up with marketable products and/or programs. The museum needs to connect with BC Museums Association (which promises a toolkit for small museums and hosts its Conference 2018: Innovation and Technology in Kelowna from October 21-23) and coordinate with regional colleagues on innovation, mentorship and training.*

Fundraising

Summerland Museum and Archives financial statements reveal annual levels of fundraising and advertising and promotion. Its actuals for fundraising revenue averaged \$996.80 per year from 2013-2017, leading to an average return on investment (ROI) of \$1.60. Actuals for advertising and promotion averaged \$2,012.80 per year. With a **much-improved fundraising ROI** of \$4.50 in 2017, the museum shows promise in raising revenue and its profile in the community. The CMA suggests advertising and promotion is an important driver of fundraising success: "Sectors such as health care, universities and hospitals have been very successful, but museums have not due to profile, image and expertise."

The museum has also banked on partnerships for fundraising. In collaboration with Summerland Quest Society, it held Fashions of a Century and ended up with \$4,065 in fundraising revenue for 2015. Feedback from the museum's Board of Directors indicates a lot of staff and volunteer hours went into staging that event, likely reducing its ROI. The museum served popcorn for 300 visitors as it joined forces with Summerland Arts Centre to mark the 30th annual Summerland Festival of Lights in November 2017. While mission driven and well received, Appraisal Day in April 2018 raised \$250. The museum follows a tip on individual giving from British Council's Fundraising and Income Generation Toolkit: "Consider using events to cultivate interest before making a formal approach."

The Archives Association of British Columbia (AABC) reported in September 2016 the museum's success in securing grant funding. The museum accessed the Canada Cultural Spaces Fund – into which the federal government recently poured \$300 million over 10 years for "creative hubs" – in renovating its front of house. The AABC mentioned one opportunity, customer service by staff, and one threat, staff turnover due to a limited budget, to the museum's ongoing fundraising efforts.

TAKEAWAYS: As it strategically applies for grants, the museum needs to more actively host high-yield events and help out with brand-aligned events to boost its community profile and build relationships with potential supporters. For the museum to enhance its customer service and outreach (relationship building), AABC recommended its Curator (Administrator) be employed full time.

Role of the Board



Board/Members

Directly contributing to the current status of Summerland Museum and Archives are the Board of Directors, members and volunteers. In a fundraising workshop in April 2018, the Board reflected the museum's values with a **focus on leadership**, particularly from promising young interns and staff, functional space and an accessible, manageable collection. In pursuing the museum's vision, the Board expected videos, visually-stimulating displays and visitor services. The Board looked to partnerships, including one with the Summerland Chamber of Commerce and its member wineries, as increasing the museum's value to regional tourism.

The Board showed emotion and tension of being caught in a chicken-and-egg scenario. The museum must go back to basics and build a track record and trust before it can go ahead and broaden support. That said, it needs support so it can go back to

basics and build capacity for fundraising. Unfortunately, some patrons have adopted a 'wait and see' approach. One Board member shared that sense with a rhetorical question: "How many people have been to the museum in the last five years?"

A short membership survey answers that question. When asked how often they visit the museum, members made "once or twice a year" the most popular response at 38 percent. Members spend time around the museum – no wonder it is considered a creative hub – as 59 percent of respondents also support the library and 47 percent also support the arts centre. Summerland Ornamental Gardens was most often the "other" answer among members.

There is an opportunity for the museum to ask members to become more deeply invested, since 52 percent of those surveyed are new (1-2 years), 76 percent do not give financially and 76 percent do not volunteer. To engage members, the museum needs to come across as accessible (67 percent are seniors), local (70 percent are residents) and personal (62 percent are personally connected to history and access to archives and ancestry.com is the most valued membership benefit).

TAKEAWAYS: *The museum needs to communicate its vision, even as its mission compels it to keep and research cultural heritage and stabilize its operations. While its messaging becomes more accessible, local and personal, the museum may want to establish a "friends" or even "young friends" membership category so more people connect with the museum's future.*

IV. Comparables

Museums

Three B.C. communities of similar size to Summerland – Lake Country (Population 13,015), Nelson (Population 10,572) and Parksville (Population 12,514) – feature comparable museums and archives. These smaller memory institutions provide pros and cons from actual fundraising practice in the province.

The outlier among these museums is Touchstones Nelson, which took in nearly \$600,000 in revenue in 2017 – more than six times that of the nearest comparable museum – in support of its new vision, "inspired by the convergence of art and history." Touchstones taps into a tourism trend, one that could help Summerland museum achieve its goal of attracting more visitors. As Resonance relates in

its 2016 Future of Luxury Travel Report, “like food in the last decade, art now makes tourism destinations of cities and neighborhoods; art is the new food for America’s richest travelers.” Touchstones also tried a health trend, starting 2017 with Yoga in the Museum.

Although it was hard on the museum’s bottom line, Parksville moved in the direction of **becoming a hybrid museum** by mixing agriculture and history. Parksville’s earned revenue included a farmers’ market and its programs included urban farming for students; that is, before it posted a deficit of \$82,300 in 2017 and its Board closed the museum indefinitely. Parksville had promotional plans for a digital exhibition and tour, which would have added public access for a museum with limited exhibition space and directed visitors to other nearby attractions.

Both Nelson and Parksville secured federal funding for recent graduates to assist in their collections management. The result for Nelson, a virtual exhibit, helped its Flickr pool attain 3.7 million hits since 2010. Lake Country partnered with University of British Columbia Okanagan (UBCO) on projects, including digitizing its Rainbow Ranche collection and offering online elements of its photograph collection. UBCO has digitized and displayed online some of Summerland’s photographs.

Visual appears to be as vital for fundraising as virtual for comparable museums. Lake Country has a YouTube channel, taking advantage of impactful video, and has a newly designed logo with a more “contemporary look and feel.” According to DonorBox, marketers who use video grow revenue 49 percent faster than non-video users.

Matching Summerland with 88 percent of its revenue from grants, Lake Country made diversifying its revenue streams and establishing more sustainable sources of revenue its primary goal.

TAKEAWAYS: *The museum needs to explore a ‘hybrid’ model in combining or expanding its mandate for more fundraising options, visitors and community value. It needs to rely on visuals in the ways it promotes that value, especially to a younger audience. It needs to openly and regularly communicate with “comparable” and regional memory institutions, not to mention post-secondary institutions like Okanagan College and UBCO, to identify best practices and opportunities.*

Non-Profits

The museum is fortunate to have a comparable non-profit organization, Summerland Arts Centre, as a neighbour and potential GLAM (galleries, libraries, archives, museums) partner. Despite having about the same number of members and a similar annual amount of fundraising, the Arts Centre is in a much different position than the museum.

It relies less on grants – although it got a \$250,000 B.C. Community Gaming Grant for a planned 2018 renovation – in a funding mix that includes gift gallery sales, summer arts programs, regular live music performances and workshops. Its mix most recently included \$6,712.97 in donations, three times that of the museum. It accepts donations online through Chimp and CanadaHelps.



From American Alliance of Museums (aam-us.org)

The centre also sees value in having a **colourful, creative public image**, lining up a grant to redesign its logo and lining the streets of Summerland with its Community Banner Project. The non-profit that once overstocked the Arts Centre building with books and other learning materials, Okanagan Regional Library, owes a more spacious new building to Friends of the Summerland Library.

After two decades and four attempts, the Friends capped off the fundraising, lobbying and planning to complete a \$3-million library construction project. The library fought to feature an outdoor terrace as part of its new space and to remain flexible in the use of that space. As much as possible, equipment and furnishings in the library are on wheels so patrons can roll things around to create their own socio-cultural experiences.

Another group of “Friends” supporting a popular attraction in Summerland, Friends of the (Summerland Ornamental) Gardens, made the library an indoor-outdoor space for patrons with a planting on Main Street. The museum must recognize the proven benefits of having mid-level members, or “Friends,” the potential benefits of functioning as an indoor extension of Memorial Park and the potential **benefits of special events**.

Friends of the Gardens pays one of two staff salaries with proceeds from a single lucrative event – or earned revenue source, if you will – its annual two-day Plant Sale in early May.

***TAKEAWAYS:** The museum needs to work with the District and GLAM partners, including Centre Stage, to expand its reach and explore a creative hub to attract more residents and visitors. There is strong evidence to suggest inviting “Friends of the Museum” to join its membership program is powerful in helping the museum meet its fundraising targets and make its vision a reality.*

V. SWOT Analysis

Strengths

- Upstart museum professionals providing customer service
- “Public trust” role with grant, in-kind support from District
- Newly designed, responsive museum website
- Purpose-built, renovated facility in central, park-like location
- Strategic plan, Board committees in place to set priorities

Weaknesses

- Inaccessible, outdated facility fails to meet new standards
- Collection backlog distracts from donor relations, programs

- Lack of diversity, unity on Board of Directors
- Limited data, tracking of supporters, visitors
- Overreliance on grants favours funders over donors

Opportunities

- Align with District Cultural Plan, Regional Heritage Plan
- Make most of new website, growth in online giving by creating, sharing fundraising capacity, content
- Include all three levels of government, plus Regional District of Okanagan Similkameen, in renewed relationship building
- Encourage collaboration with indigenous groups, given cultural/historic significance of Summerland to Syilx people
- Tap into deep appreciation of history and heritage in District's cultural values and region's railway culture
- Participate in network of popular heritage assets, tourist attractions, partnering with outdoor groups who assist in explaining and exploring Summerland's natural heritage
- Proximity to SADI, school lends itself to student internships, multi-generational programs
- Take advantage of capital upgrades to library, arts centre to investigate Creative Spaces funding, shared resources and instigate development of downtown creative hub
- Support KVSR's capital campaign to raise public awareness, value of heritage assets

Threats

- District priorities change, reducing or eliminating annual grant, in-kind support to museum
- Collection backlog, decommissioning process continues to demand focus, resources
- Board, staff turnover leads to lack of institutional memory, fundraising momentum
- Costly damage or maintenance needed with aging facility, lack of safeguards

- Lack of diversity, unity on Board of Directors leads to community distrust of museum
- CMA considers linking financial assistance to standards (collection significance, expertise, sustainability)

TAKEAWAYS: *Considering museum strengths include online content and on-site collaboration, opportunities to attract donations through the new website and visitors through the new library appear most cost-effective. Alignment with the District and its Cultural Plan will go a long way in promoting a downtown “smart park” and protecting government support.*



From American Alliance of Museums (aam-us.org)

VI. Insight

There is no place like home to find relevant research on best practices for Summerland Museum and Archives. Although it stretches past museums to study non-profits, Okanagan College's Challenges in Achieving Non-Profit Sustainability offers insight from many regional organizations, including:

- “The non-profit sector must move toward a **collaborative business model** – working together, sharing resources and expertise, and addressing common mission goals, while decreasing competition and reducing financial insecurity.”
- “General skill shortages in non-profit organizations call for **professional development and training**...however, 61% of respondents reported that there is insufficient funding available to provide development and training, despite 50% reporting that this is included in the organizational strategy.”

- “Databases are another important IT issue for non-profits looking to track and **maximize the benefits of relationships** with funders, donors, clients, volunteers, partners, foundations, and suppliers, yet 6% of respondents reported that their organization uses no type of database.”

Most of From American Alliance of Museums (aam-us.org)

B.C. Museums Association’s online best practices modules appear in need of updating, although the association announced it is preparing a new toolkit for small museums.

BCMA identifies Virtual Museums of Canada as a potential source of support for **website development**. Most of the following best practices equate fundraising and relationship building:

- Applied Technology (Nicholas Tuele Consulting): “Tracking a donor’s past record of giving allows for a more **timely and targeted approach** to wooing the donor.”
- Financial Management (David Hall/Rick Duckles): “Fundraising should always be seen as an ongoing activity that focuses on building relationships (**“friend-raising”**).”
- Marketing (Yvonne Sharpe): “It is important to maintain and build personal connections. Take the time to **visit businesses** that have the potential to refer visitors to your museum.”
- Strategic Partnerships (Ken Mather): “**Service clubs** such as Rotary, Lions, Kinsmen, etc. are often looking for long-term relationships with museums.”

BCMA’s 2018 B.C. Budget Submission called for increased funding for core programming and operations as its members’ top priority, in part because “overworked and **underpaid staff and volunteer burnout** are commonplace and organizations are missing opportunities to build audiences, serve communities, connect with First Nations and increase their financial sustainability.”

In The State of Museums in Canada, the CMA lists ways in which museums are changing (or not changing) to meet challenges:

- “No longer static or traditional temples, museums have transformed themselves into **innovative community hubs**, becoming more engaged and relevant.”
- “Encourage museums to work closely together in regional groupings...only through complete **collaboration and sharing** of common services will many museums survive.”
- “Many museums are diversifying their sources of income especially through **earned revenue** (e.g. admission fees,

store sales, rentals, sponsorships). As an example, the volunteers at Galt Museum in Lethbridge, Alberta, harvest heritage seeds from the native plants garden and sell more than 40 kinds of seeds in five retail outlets.”

The CMA is one of many organizations to offer a guiding definition of sustainability for museums:

- “(A sustainable museum) assessed the **impact of its activities** on the environment, on the quality of life of its stakeholders, and on the economy.”

The International Council of Museums sees sustainable museums as balancing their responsibilities in recognizing and preserving heritage and responding to the needs of their communities:

- “To be sustainable, museums, through their mission, must be an **active and attractive** part of the community by adding value to the heritage and social memory.”

Izabela Luiza Pop and Anca Borza, co-authors of an article in Sustainability called “Factors Influencing Museum Sustainability and Indicators for Museum Sustainability Measurement,” need seven words to sum up museum sustainability:

- “A sustainable museum is **a community museum.**”

Many publications and/or organizations have engaged experts and researchers in imagining museums of the future. Museum iD magazine came up with the #FutureMuseum Project, producing:

- Amy McDowall, Manchester Museum: “We should now be supporting the mainstream education sector to have (conversations) with us too. If we succeed, we will reap the rewards of a more **diverse future audience.**”
- Jenny Kidd, Cardiff University: “Museums understand **immersive encounters** as one way to better position themselves within the ‘experience economy,’ where the competition is...escape rooms and street games.”
- Ken Arnold, Copenhagen University: “The most important museums of the next half century will be those that frame their mission around a **spirit of enquiry**, and whose public programmes effectively turn both curators and visitors into investigators of sorts.”
- Ryan Dodge, Royal Ontario Museum: “We can no longer attempt to tell people we are fun and interesting places to spend time, **our community has to do it** for us and museums need to provide and encourage those experiences onsite and online.”

- J.Y. Gallardo, Museum of Art, Architecture and Design (Norway): “Gaining space and functionality is not enough. Added value lies in creating an environment where it is good to be, an **arena for interaction** between artwork, visitor, museum and society.”



From www.aim-museums.co.uk

- Stuart Gillis, Consultant: “Come up with something that is highly **relevant to your area**; something that looks like part of the solution; something that captures the imagination; something that is too good to be ignored. And then dig in and fight for it.”

In response to the question “what should our museums look like in 2020?” The Guardian newspaper published the following:

- David Anderson, National Museum Wales: “Museums are already the most innovative public institutions in the arts and cultural sector. By 2020, they should have turned this **expertise outwards**, to become centres for public creativity and local enterprise.”

- Robert Hewison, critic, curator and academic: “Museums will need to do everything they can to engage with their public, through their displays, education and outreach programmes, and by being **as open as possible** to what their audience wants.”

Ontario Museums Association came up with a 2025 Strategic

Vision and Action Plan, which includes:

- “Explore **new beneficial relationships** with various parties, including other collecting institutions (libraries and archives), other cultural organizations, governments, the tourism industry and other sectors such as health and education.”

- “Help a community distinguish itself, providing a **strong sense of local identity** and creating an engaged, vibrant community where people want to live, work and play.”
- “**Rewarding opportunities** are available for emerging museum professionals who demonstrate initiative, talent.”

The American Alliance of Museums offered some 2040 predictions:

- “The very concept of museum was changing – from single-purpose organizations housed in iconic architecture to **hybrid institutions** that also fill the roles that used to be siloed in libraries, community centers and schools.”
- “As we **changed our staffing models** to accommodate the influx of visitors, expanded uses of our facilities and online resources, and the ever-growing demands on our museums, we saw a hiring boom in the areas of technology, audience experience and engagement and marketing and communications.”
- ‘First floors that were once reserved for admissions, stores and high-profile galleries were redesigned as **flexible, adaptive public spaces**, filled with seating and tables, books, food and drink, computers and other tools of the digital age. Our public came to treat these new spaces as indoor extensions of our public parks.’
- “Institutions are no longer obsessed with bigger, newer buildings and ever-expanding collections. They’ve moved on, placing more value on creating **better, smarter, more community-oriented** facilities and resources.”

Charity Village is one of many organizations to look at fundraising trends. As it refers to rapid increases in online donations and social media followers for charities in its Five Emerging Trends That Should Be On Every Fundraiser’s Radar, it also notes:

- “Canadians are favouring local charities – the (AFP) Foundation’s (for Philanthropy in Canada) research found that since 2013, donations to **organizations with a local focus** increased from 49 percent to 54 percent, while donations to organizations with a national focus declined from 35 percent to 28 percent.”
- “Among the findings of the 2016 Burk Donor Survey was the percentage of respondents who follow charitable organizations on social media has ‘increased significantly,’ particularly among charities that ‘post relevant updates on their work with timeliness and refreshing content plus **effective use of images.**’”

- Penny Blackwood, Memorial University: “Our number one issue is staffing – attracting, recruiting, onboarding, then keeping really good staff...we have made the decision and commitment that we need to **‘home grow’ our talent.**”

TAKEAWAYS: Dr. Guy Berthiaume, Librarian and Archivist of Canada, explained how the future for museums will unfold online and onsite: “The great challenge comes from the fact that the more people use the Web to access our resources, the greater their appetite for visiting our actual physical spaces. So that means we cannot ‘de-invest’ our in-person services to invest in our virtual services. Memory institutions have to do both.” Summerland needs to be accessible (online and onsite), communal, entrepreneurial, flexible, local, personal and visual to achieve financial autonomy.

VII. Case for Support

Summerland Museum and Archives aims to be part of a brighter future for our community. As we make steady strides toward our vision as “a place of passionate exploration of Summerland’s history,” we ask that you light the way with your generous support.

Our museum remains dim and empty much of the time, mired in multi-tasking to meet a mandate to “collect, preserve, research, interpret and display objects that are historically significant to our community.” Even though it was purpose built in 1984, our museum is inaccessible and outdated by today’s standards. Summerland’s

“At a time when our museum needs laser focus, leading to greater access to educational programs and immersive experiences, we are holding up a lantern.”

community collection requires conscientious care by staff and volunteers on site and considerable storage space off site.

At a time when our museum needs laser focus, leading to greater access to educational programs and immersive experiences, we are holding up a lantern. “The reality facing many small museums is not a pretty picture,” Canadian Museums Association points out in The State of Museums in Canada. “It’s a shocking portrait.”

Summerland’s pride and status as a best-off region in the province, placing second in socio-economic indices from BC Stats, and the museum’s public service role, reinforced by our supportive district

government, only makes this struggle more stunning. With your assistance, the museum adds **value to the community** by:

- reflecting our **cultural values** in the District's Cultural Plan
- enhancing our **cultural tourism** experience for visitors, acting as a 'home base' for tours and trips to outlying attractions
- contributing to our **cultural hub** where residents and visitors share ideas and show support for businesses and events
- preparing our youth, some of whom gain experience as interns and summer students at the museum, for **cultural careers** in a more knowledge-based economy
- increasing our **cultural access** with admission by donation for patrons with large families/groups or limited incomes
- developing our **cultural leaders** who lend out their expertise

As he mentioned \$5 in municipal benefits for every \$1 invested in memory institutions, Canada's Librarian and Archivist Dr. Guy Berthiaume made it clear why our museum matters: "This is powerful place-making – giving people the tools they need to adapt to change, making our cities and our communities more livable, more welcoming and more sustainable."

Light serves as a symbol of learning, warmth and hope. By joining our group of friends as a member and giving **Light at the Museum**, you provide urgently needed resources for training our staff and volunteers, educating our youth, welcoming our visitors and showing pride in our community. Your support for Summerland Museum and Archives signals brighter days ahead for all of us.

VIII. Needs/Objectives

Summerland Museum and Archives needs a new course of action to pursue its vision, arriving at "a place of passionate exploration of Summerland's history." It is driven by stewardship, which applies as much to donors and funders, and members and volunteers, as it does to archives and artifacts.

The museum must at once **inspire support** from residents and visitors and **increase capacity** in its mission-driven operations. Based on observations, interviews/surveys and research through this planning process, four needs emerged as objectives for the museum's five-year fundraising action plan:

- Creative Partnerships
- Consistent Processes
- Compelling Promotions
- Committed People

Some strategies to meet these objectives are more immediate than others. They are short-term (2018) strategies, leading to medium- (2019-2020) and long- (2021-2022) term strategies. As a learning organization, the museum is open to changing plans and priorities based on what The Nature Conservancy calls a “**family of measures**” and **feedback** from stakeholders.

As many strategies as possible are aligned with the museum’s Strategic Plan, ensuring buy-in from the Board of Directors. Whenever possible, strategies contribute to big-picture initiatives such as the District of Summerland’s Cultural Plan, Regional District of Okanagan Similkameen’s Heritage Strategy and B.C. Rural Dividend Program’s objectives.

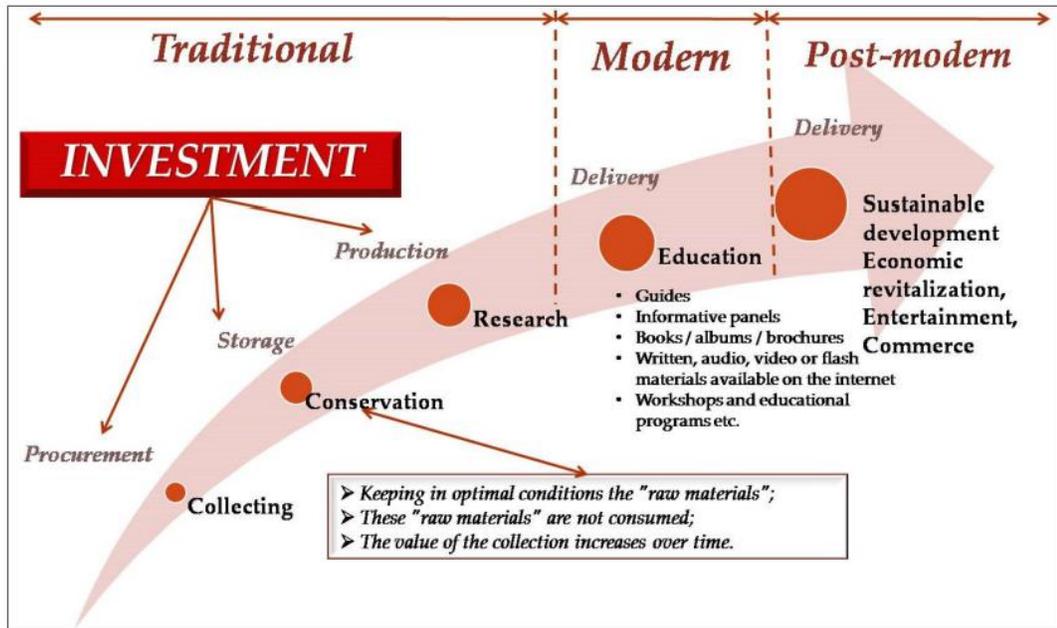
IX. Action Plan

See Calendar and Plan Attached.

X. Evaluation

Summerland Museum and Archives is above all else a learning organization. As such, it intends to monitor and measure progress throughout this fundraising action plan and make course corrections as needed. The museum’s motivation – to become accessible and sustainable through fundraising over a long term – comes from its mission and vision rather than outside competition.

“The **commitment to continuous improvement** is, in fact, at the core of the definition of what it means to be a nonprofit-like organization,” Paul Light explained in Pathways to Nonprofit Excellence. “Having started the journey to higher performance, a nonprofit-like organization keeps the pressure on no matter where it happens to be in the journey.”



(From Sustainability (www.mdpi.com))

The museum gains an ability to analyze data and adjust strategies as it accepts gifts and sells event tickets online, adds a supporter database and arms staff with applicable skills. Based on insight from Blackbaud, the museum monitors RFM (recency, frequency and monetary) levels for donors. It relies on comparative results to "make additional incremental increased investments in fundraising effort, category by category, based on the performance (ROI) of previous fundraising activities," as the Fundraising Effectiveness Project recommends in a 2017 survey report.

At the highest level, the museum remains determined to reach its five-year fundraising targets of \$300,000 in revenue and 60-20-20 in revenue distribution. The museum benefits from fundraising in ways that go beyond the monetary. "Fundraising can also lay the groundwork for raising the public's awareness of key social issues, help you market your agency, and build long-term relationships with donors and stakeholders," according to Community Literacy of Ontario's Road to Excellence.

XI. Appendix

A. Acknowledgements

Summerland Museum and Archives Society thanks the Government of B.C.'s Ministry of Forests, Lands, Natural Resource

Operations and Rural Development for its financial support of this plan through the BC Rural Dividend Program.

Guest Curators Paul and Eunice Randall inspired this plan with their “passionate exploration” of Summerland’s contributions to the First World War. The Randalls took tremendous pride in producing the exhibit *Summerland Remembers the Defenders of the Empire*, attracting a full house to the museum opening on June 8. Others who generously contributed to the plan include:

- Museum Administrator Claire Macdonald, Archivist Stephanie Normandeau, Accountant Colleen Rolston, Board of Directors, led by Chair Kay Treadgold and Past Chair Sandy Nicolson, Volunteer Coordinator Carol Stathers, Valued Members
- District of Summerland, Community Development Coordinator Angelique Wood, Manager of Parks and Recreation Lori Mullin
- Summerland Community Arts Council, President Betty-Ann Xenis, Administrator Sonja Waller
- Okanagan Regional Library, Summerland Branch, Community Librarian Sue Kline
- Friends of the Gardens, Chair Bonnie Fulton
- Kettle Valley Steam Railway, Director Bonnie Milton
- Ryga Festival President Peter Hay and Director Dortha Atwater
- Central Okanagan Heritage Society Managing Director Shannon Jorgenson
- BC Museums Association Executive Director Erica Mattson

B. Comparable Museum Financials

2017	Summerland	Lake Country	Nelson	Parksville
Total Revenue	\$ 72,191	\$ 86,745	\$ 594,814	\$ 86,607
Grants	\$ 63,349	\$ 75,933	\$ 302,174	\$ 35,425
%	88%	88%	51%	41%
Total Expenses	\$ 108,409	\$ 80,454	\$ 564,816	\$ 178,995
Employment	\$ 78,903	\$ 44,036	\$ 191,942	\$ 102,848
%	73%	55%	34%	57%

C. Member Survey

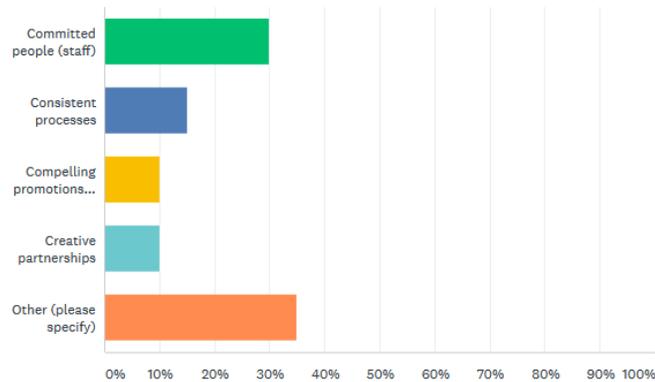
Q10

Customize

Export ▼

The museum should invest more funds it raises on its

Answered: 20 Skipped: 1



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