

# ***DRAFT Heritage Strategic Plan***

***November 2008***

## **I. Mission & Vision**

*Heritage fosters diversity, tolerance and good governance by promoting open museum practices.*

Heritage developed the concept of the Open Museum in order to inspire and motivate museums to welcome, engage and involve the widest possible visitor base. Heritage's vision of the Open Museum is based on three principles:

**Open Museography.** All individuals and societies tell stories to explain who they are, where they have come from, and where they are going. Understanding others depends on listening to their stories and seeing things from their point of view. Open museums display objects and organize exhibits that tell stories from multiple and contrasting perspectives.

**Open Governance.** Heritage believes that only museums that practice transparent, inclusive and open governance can consistently and reliably represent the diversity of their subject matter and respond to the diversity of their audience. Moreover, open museums model the governance practices essential to peaceful coexistence.

**Open Access.** Open museums create an environment that is welcoming and accessible to the entire range of museum stakeholders. This means bringing the museum to the people through traveling exhibits, school outreach, performances, celebrations, and, of course, the internet.

Open museums encourage everyone to play an active role in preserving, protecting, and promoting their heritage. They promote tolerance by embracing the complexity and contradictions inherent in all history and culture. They encourage good governance by embodying the values of transparency and inclusion. And finally, museums are simply more interesting, engaging and rewarding to their visitors when they present a variety of contrasting perspectives and interpretations. *Because there are at least two sides to every good story.*

## II. Heritage Partner Programs

Heritage works with selected partner museums to improve their exhibits and programs through the adoption of Open Museum practices. Open Museum online will become the core program for Heritage and the focal point for other Heritage services, including on-site workshops, consultations, seed grants and online project management support. All programs are available free of charge to museums that submit a successful application for a Heritage partnership. To qualify, partner museums must demonstrate a willingness to adopt the principles and practices of an open museum and a commitment to participate in Open Museum online.

**1. Open Museum online: OMo.** In spring 2009, Heritage will initiate an exciting new program: a web-based service that will enable museum stakeholders to build interactive collaborative exhibits online, bringing the open museum dialogue to disparate and dislocated communities, populations in exile or diaspora, and museums without adequate buildings and structures. OMo is a tool for expanding museum outreach and a catalyst for improving museum governance, access, and museography.

**2. Workshops.** Heritage organizes on-site workshops for museum stakeholders to lay the groundwork for their participation in Open Museum online. Groundwork includes a self-assessment of the museum's collections; exhibit planning and outreach; clarification of the museum's mission; and hands-on instruction in OMo technology and techniques. Heritage offers free online project management support, consultations, and follow-up workshops to partner museums as needed.

**3. Consultations.** Professionally trained and qualified members of the Heritage Participating Professionals Network provide technical consultations and assistance to partner museums for targeted projects or to meet specific needs related to Open Museum online.

## III. Criteria for selecting Heritage partner museums

Partner museums must demonstrate high potential for success, through some combination of the following characteristics:

- Stakeholders accepting of open museum philosophy
- Ability and willingness to commit to participation in Open Museum online
- Museum willing to make in-kind contribution (food, lodging, ground transport)
- Long-term sustainability of museum

## IV. Open Museum Evangelism and Outreach

Our ongoing work with partner museums and participating professionals is a continuing source of new ideas and provides an invaluable opportunity to test new practices in the field. At the same time, we want to leverage our insights and discoveries in ways that benefit more visitors and reach more museums by evangelizing the Open Museum concept both within the professional community and to the general public.

Heritage's goal is to play a leading role in formulating, refining, and promoting the Open Museum concept. Heritage's Open Museum evangelism efforts will include:

**Open Museum online Outreach.** Heritage will promote Open Museum online through its various web presences and marketing materials. Furthermore, it will organize demonstrations of OMo at public events and professional conferences.

**Open Museum Evangelism.** Heritage will continue to actively develop and refine the Open Museum concept, and promote both the term "Open Museum" and the associated practices within the professional museum community through published articles in professional venues, presentations at seminars and conferences, and via the Web, including the Heritage blog, *Inheritance*.

## V. Budget and Scaling

In 2008–2009 Heritage will:

- Participate in the development of Open Museum online: engineering and outreach.
- Revise our programs and workshop curriculum to fit with Heritage's new focus on Open Museum Online.
- Revise our evaluation tools for OMo-related projects and organizational outcomes.
- Create and implement a strategic plan for development.

### **Projected costs and revenues October 2008–December 2009.**

(Note that the budget year extends beyond the strategic planning year.)

#### **OMo Engineering:**

Product research/design

Heritage Staff: 40% fte, \$20,000

Industry, technology, and market research, RFC administration

#### **OMo Outreach:**

Training/support

Heritage Staff: 60% fte, \$30,000

Organize and deliver curator workshops and technical support

Travel & lodging

Heritage: \$8,000

\$8000 travel and lodging for Heritage-run curator workshops

**Breakout of Heritance costs by line item on OMO development to release, at 6 months and total:  
Release = July 1, 2009 & 6 months = December 31, 2010**

	To Release	6 months	Full Project
Heritance Task			
Training/support	12,000	18,000	30,000
Product			
Research/design	8,000	12,000	20,000
Workshop Expenses	4,000	4,000	8,000
Total Heritance			58,000
budget	24,000	34,000	

## VI. Financial Sustainability

Heritance is designed to optimize financial resources. Heritance is committed to keeping its costs low through a combination of frugality by the organization, volunteer services by supporters and in-kind contributions of food, lodging, and ground transportation by partner museums.

Heritance revenues will come from three primary sources:

- **Donations** from high net-worth individuals. During the 2008 fundraising year, we will focus primarily on developing relationships with donors in the northeastern United States with an interest in Heritance's social mission of promoting cultural diversity, tolerance, and good governance through constructive dialogue.
- **Grants** from foundations that fund technology tools for museums or for community building; museums (cultural projects) in geographical areas in which Heritance has partner museums; or programs that promote cultural tolerance and good governance either regionally or globally.
- **Consultation fees** by museums and other organizations that can afford to pay Heritance for OMO training workshops, consultations, and technical support.

## **VII. Outcomes and Metrics**

We are committed to outcomes-based management, and the use of tools and metrics to track Heritance's internal performance, the outcomes achieved by our partners, and our ability to influence our partners' organizational culture processes.

In 2009–2010, we will develop tools and metrics to measure the success of Open Museum online and identify and track key indicators to evaluate the value of OMO and its effectiveness in affecting organizational change. Furthermore, we will develop a set of criteria and a tool for evaluating the Executive Director.

## **VIII. Milestones: April 1, 2008–March 31, 2009**

- Create Open Museum online alpha prototype by January 1, 2009 and perpetual beta release by March 31, 2009; present project to potential donors and users.
- Implement fundraising information system in order to record qualifications of potential donors and track contacts.
- Raise \$30,000 through personal donations and foundation grants to meet funding requirements for Heritance operations, programs, and development.
- Create project evaluation with outcome analysis (ongoing through 2010) in order to more fully answer the question of the social impact and value of OMO and related Heritance programs.
- Refine the application criteria, process, and documents for new partner museums and projects in light of shift of focus to OMO.
- Revise the Heritance website content to reflect the shift in program focus to Open Museum online and create additional web presences in light of developments in Web 2.0 social networking tools and Generation Net's use patterns.
- Recruit Heritance partner museums according to the new criteria (namely, willingness to create

online exhibits through OMo).

- Capture Heritage programs on audio-visual equipment for use in training, marketing, and assessment.