Fear No Plan!
Laying the Groundwork for your Museum Project

May 9, 2019, 2:15-3:30 pm
Association of Children’s Museums’ INTERACTIVITY 2019
Denver, CO

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We will give you our contact info again at the end.
Session Objective:
Get an idea of what will benefit your project!

1. Which data?
2. Which plans?
3. In what order?
4. To what end?
5. Lessons learned...

And how can we make this a fun and interesting session?
Who is in the room?

Sidebar: Slides will be published by ACM. You don’t have to fill up your phone with photos!
Session Plan:

1. Overview
2. Lessons Learned *(spoiler alert!)*
3. Detailed look at three specific plans
4. Two Case Studies
5. Q/A Discussion

*Ask questions any time! Also, we’ll leave 15-20 minutes for Q/A.*
A Complex Landscape

RAISING THE MONEY
Fundraising Feasibility Study
Capital Campaign Plan
Brand Strategy, Communications & Marketing Plan
Renderings, Fundraising Images

PLANNING for DESIGN AND CONSTRUCTION
Programming & Building Brief: Strategic, Functional, Technical
Master Plan
Basis of Design
Concept Plan
Interpretive Master Plan

STRATEGY AND BUSINESS PLANS
Strategic Plan (vision and impact)
Business Plan
Organizational Plan
Socio-Economic Impact Study
Needs Assessment
Market & Economic Feasibility Study
Pre-Opening Operating Plan

PROJECT MANAGEMENT and PRICING
Total Project Costs and Schedule
Construction Costs and Schedule
Pre-Opening/Operating Plan
Continuous Operations Plan
Endowment / Operating Reserves

Why would you have questions?
Four Areas of Alignment Emerge:

- Business and Strategic Planning
- Fundraising and Engagement
- Project Management
- Design / Construction Planning

Your project planning will likely touch all four of these in some way.
RAISING THE MONEY

Fundraising Feasibility Study
Capital Campaign Plan
Brand Strategy, Communications & Marketing Plan
Renderings, Fundraising Images

Sample Project X

PLANNING for DESIGN AND CONSTRUCTION

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Basis of Design
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PROJECT MANAGEMENT and PRICING

Total Project Costs and Schedule
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Different projects need different plans to move forward
Lessons Learned from Business Planning

• Never to early to start: it will change.
• “Right-sizing” for market and economic potential, and fundraising potential to inform design planning.
• Understand the competitive context of your market.
• Audiences are becoming more sophisticated, there is more competition, and there is increasing price resistance.
• Renewal, change, and reinvestment are necessary to stay competitive.
• In evaluating new and expanded museums, operating sustainability is at least as important as obtaining funding for capital costs.
Lessons Learned from Fundraising and Engagement

• Successful fundraising doesn’t happen in a vacuum
  • it is most effective when it is woven into the fabric of planning and the organizational culture.

• Fundraising is like eating an elephant
  • one bite at a time, but you must take a bite everyday

• Fundraising sits at the intersection of people and process
  • grounded in relationships that are nurtured and authentic
  • deliberate and data driven
Lessons Learned from Project Management

• Set yourself up for success (this means what you expect it means)
• Outline a Vision – Have a point of view! (a unified one)
• Know your Building Program
  • Strategic Goals are met via Square Footage & Technical Requirements
• Know your Overall Schedule
• All the other stuff is important but....

\[
R = \frac{(S+B) \times RP_1}{L_1 + L_2}
\]

[reality = (schedule + budget) \times (the right) people! / luck + love]
Lessons Learned from Design and Construction Planning

• Find a team that matches your style. It’s a long road.
  • Create a team built for collaboration, co-creation and success.

• Prepare to be a Great Client:
  • Big picture + big dreams. They are yours! Steward them!
  • Chain of Communication AND Chain of Decision Making
  • Know thyself and thine organization. Set expectations accordingly.
  • Treat people well. It’s a long road.
  • Don’t fear change or hurdles. They will both show up. Embrace them.
  • Iterative process. Living documents will serve you, and the design, well
Lessons Learned from IN THE FIELD

• Short, public deadline (terms with City)
• Challenge: Establishing a brand while raising capital
• We are “in the forest,” so more lessons to come
Lessons Learned from IN THE FIELD

- Prioritize plans by resources, timing, & goals
- Sequencing plans
- Board’s role versus ED versus PM
- Project management organization tools
- Relationships over transactions
- Museums that plan do better!

You will see these again at the end!
<table>
<thead>
<tr>
<th>Business Planning</th>
<th>Fundraising &amp; Engagement</th>
<th>Project Management</th>
<th>Design Planning</th>
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<td>Market and Economic Feasibility</td>
<td>Strategic Plan</td>
<td>Programming &amp; Building Brief</td>
<td>Needs Assessment</td>
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<td>Business Plan</td>
<td>Fundraising Feasibility Plan</td>
<td>Total Project Cost</td>
<td>Master Plan</td>
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<td>Pre-Opening Operating Plan</td>
<td>Capital Campaign Plan</td>
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<td>Exhibit / Interpretive Master Plan</td>
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<td>Marketing &amp; Communications Plan</td>
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<td>Institutional Programming Plan</td>
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Business Plan: Project Planning Process

Source: ConsultEcon, Inc.
Market and Economic Feasibility: What is it?

• Establishes Market and Economic Potential of the Project Concept and Plans
• Basis for preliminary Business Plan for project
• Iterative Process between Design Development and Market & Economic Feasibility to Achieve Optimum Program

• Define Market and Operating Impact of Project Concept / “Big Picture Idea”
• AND, IN TURN
• Establish Market and Economic Parameters for Project Concept

• Rinse, Repeat through construction documentation and project opening
Market and Economic Feasibility: Process
Market and Economic Feasibility: Socio-Economic Benefits

• Used for Fundraising in Public and Private Sectors
• Can be Particularly Important for Non-Profit Attractions that Rely on Government Support

• Quantifiable Economic Impacts due to Construction and Operations
• Multiplier Analysis
• Fiscal Revenue / Tax Generation Potential
**Business Plan**

*More Detailed than Initial Feasibility Study*

- Mission & Vision Statements
- Organizational Plans
- Pre-Opening Ramp Up
- Stabilized Operations
- Staffing / Hiring Plans
- Cash Flow / Monthly & Annual
- Capital Fundraising Plan
- Operations Plans
- Economic Impacts
- Community Benefits

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**Example: Table of Contents:**

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<th>Section</th>
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<td>Executive Summary</td>
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<td>1. Introduction and Assumptions</td>
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<td>2. Concept Design and Project Description</td>
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<td>3. Market Context</td>
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<td>a. resident and tourist markets</td>
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<td>b. competitive context</td>
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<td>4. Organization &amp; Structure</td>
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<td>b. Board Members</td>
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<td>5. Financial Plan</td>
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<td>a. Includes project cost estimate and</td>
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<td>estimate of pre-opening costs based on</td>
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<td>operating plan</td>
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<td>6. Socio-Economic Impact Analysis</td>
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<td>7. Appendices – could include Letters of Intent</td>
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<td>or Memorandums of Understanding for</td>
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<td>securing site and support</td>
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</table>
Pre-Opening Operating Plan

• Establish implementation team and on-site infrastructure
• Establish temporary office, “pre-occupancy”
• Recruit, train and empower local team
• Acquire and install specialist equipment & supplies
• Acquire and establish exhibits
• Prepare marketing and operational strategies

• **Grand Opening**
• Post-opening operations
• Establish Corporate Culture and Cultural Integration
Pre-Opening Operating Plan: Pre-Opening Key Dates

- End of Construction
- Exhibit Installation Complete
- Order 50% Retail COGS
- Marketing & Communications Plan
- Occupancy of Space
- Technical Training
- Pre-opening/Audience Testing
- Soft Opening Date
- Grand Opening Date
Project Costs are Comprehensive

**TOTAL PROJECT COST**

**ENDOWMENT**
- SOFT COSTS
  - Campaign Costs
  - FF&E
  - Owner’s Costs
  - Owner’s Contingency

**“HARD” COSTS**
- Land Acquisition
- Construction
- Design Fees
- Consulting Fees
- Construction and Design Contingencies

**OPERATIONS**
- TRANSITION COSTS
  - Moving, Storage

**CAMPAIGN REVENUE**
- Individual / Board
- Foundation
- Corporate
- Community
- Friends-Of

**IN KIND DONATIONS**
- Construction
- Operations
- Campaign

**ANNUAL DONORS**

**TOTAL PROJECT REVENUE**
Total Project Cost

• Includes:
  • Construction Budget
  • Transition Budget / Pre-Opening /Land Acquisition/Campaign Costs
  • Endowment, Operating Reserves

• Cash flow:
  • Map dollars required against the schedule. Connect with dollars available.
Fundraising Feasibility Study

• **Why?**
  • To determine extent of support for proposed capital initiative
  • To begin building the relationships that will be critical for success

• **What’s Involved?**
  • Understanding the current landscape
    • Documentation review
    • External factors assessment
  
  • Measuring the internal and external readiness and preparing
    • Confidential interviews
    • Findings and recommendations
Key Ingredients for Success

- Context
- Staffing & Systems
- Case for Support
- Leadership
- Donor Engagement

FUNDRAISING STRATEGY
Campaign Planning Process

THE BUILDING BLOCKS

Internal Assessment
- Assess the Museum’s fundraising operations and its internal readiness for a campaign

Case Development
- Understanding and articulating your plan in a way that inspires those outside of your museum as well as those inside

Capacity Analysis
- Develop strategies based on data - wealth screenings, donor giving history, and estimate the total philanthropic potential available to the Museum

Member Survey
- Opinions towards the Museum; Understanding of the Museum’s campaign plans and priorities, along with re-engaging members

Engage Donors
- Develop and implement strategies for insiders (early donors) and volunteers to quickly advance the campaign and create momentum
Gifts of All Types
5% of Goal

Campaigns are Top Down

Leadership Gifts
75% of Goal

Major Gifts
20% of Goal

It’s about Big Gifts
• It takes 18-24 months to secure a major gift

It’s about People
• Peer-to-peer
• Involvement
• Discussions

Gifts of All Types
5% of Goal
The Campaign Is Inside Out

“Insiders” — regardless of their gift capacity — should give first.

Experienced donors will ask if the board and staff have given.

100% Board Participation!
What Are Your Tools?

- Corporate Sponsorships
- Events
- Stewardship
- Foundation Grants
- Major Gifts
- Planned Gifts
What Tools Do You Use and When?
The Importance of Building Relationships

It generally takes several meaningful interactions before a major gift is received.
Master Plan: A “catch all” or a great tool?

• Documents the way forward:
  • Where do you want to be as an organization in X years?
• Sequence
  • What are the steps toward the goals?
• Guides the organization
  • Documents decisions and priorities
• Informs INTERNAL stakeholders
  • Where are you going together?
• Engages EXTERNAL stakeholders
  • Inspire, inform, reassure your supporters
• Gets input from visitors, donors, members
  • Opportunity for engagement and data gathering
• Provides a framework for preliminary Cost Estimates
• Sets the stage for fundraising
  • Shows donors that you have a plan
Master Plan: What should be included?

Table of Contents [SAMPLE]

- Executive Summary (for those who want the highlights!)
- Narrative or Basis of Design
- Audience and Attendance Data
- Facility Program – Existing and Projected
- Plans and Diagrams
- Inspirational images from similar institutions
- Sequencing, phasing or other timeline of priorities
- Images that communicate the vision
- Documentation of community or stakeholder engagement
- Preliminary Budgets – Costs and Opportunities
Activities and Facility

Developing the program for the new Aquarium of Boise means determining the sizes, characteristics, and adjacencies of rooms and spaces for the facility. The program must accommodate the animals, people, equipment, storage, and all of the activities of the Aquarium.

The new facility is targeted to utilize 25,000 SF indoors and 10,000 SF outdoors, and to accommodate approximately 90,000 gallons of water to serve animals on exhibit and in back-of-house areas.

Aquatic Exhibits

- **540 SF**
  - Cold Rivers - Idaho Exhibit
- **900 SF**
  - Kelp Forest
- **360 SF**
  - Warm Rivers - Amazon
- **450 SF**
  - Coral Reef
- **1,350 SF**
  - Open Ocean
- **900 SF**
  - Deep Ocean
- **540 SF**
  - Touch Tank
- **900 SF**
  - Shallow and Tide Pools
- **450 SF**
  - Jellyfish
- **1,350 SF**
  - Special Exhibits

Terrestrial Exhibits

- **720 SF**
  - Rainforest Reptiles
- **540 SF**
  - Westland Amphibians
- **180 SF**
  - Desert Tortoise Exhibit

Visitor Areas - non exhibit

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<tr>
<th>Area</th>
<th>SF</th>
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<td>Visitor</td>
<td>80</td>
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<tr>
<td>Lobby</td>
<td>600</td>
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<tr>
<td>Touring / Retail Areas</td>
<td>200</td>
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<td>Retail Storage</td>
<td>900</td>
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<td>Group Orientation</td>
<td>200</td>
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<td>Birthday Rooms</td>
<td>400</td>
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<tr>
<td>Classroom</td>
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<tr>
<td>Visitor Rest Rooms</td>
<td>600</td>
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<tr>
<td>Family Rest Rooms</td>
<td>80</td>
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</table>

Total Interior Program: 9,805 SF
Total Exterior Program: 4,964 SF

Back Of House

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<th>Area</th>
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<tr>
<td>Lab / Vet</td>
<td>400</td>
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<td>Commissary</td>
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<td>Quarantine</td>
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<td>BOH Storage / Maintenance</td>
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<td>USS Space (Soft Gold)</td>
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<td>Offices</td>
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<td>Cubicle / Desks</td>
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<td>Staff Work Stations</td>
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<td>Staff Rest Rooms / Locker Rooms</td>
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<td>Meeting Rooms / Staff Lounge</td>
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<td>Catering Kitchen / Staff Kitchen</td>
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Total Back Of House: 7,617 SF

Exterior Program

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<td>Splash Pad / Play</td>
<td>1,800</td>
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<td>Kids' Archery (Nature Themed)</td>
<td>2,000</td>
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<td>Outdoor Ambassador Animal Presentation Space</td>
<td>400</td>
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<tr>
<td>Outdoor Classroom / Amphitheater</td>
<td>1,000</td>
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<tr>
<td>Outdoor Circulation</td>
<td>1,000</td>
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Total Exterior Program: 10,000 SF

Prepared by MSH|Portico with CDPIGA June 20, 2019

Aquarium of Boise | Visitors Report

5/14/19

Interactivity 2019: Fear No Plan!
Master Plan: *Connected to your whole project*

- **ROBUST Master Plans reference or are connected to:**
  - Strategic and Business Plans
  - Fundraising Feasibility Review
  - Case Statements
  - Detailed Site Analysis

- **GOOD Master Plans LEAD to:**
  - Concept Plans and Design
  - Project Cost Estimates
  - Renderings, sketches, evocative images
  - Phase by phase feasibility review and funding analysis
Master Plan: Lessons Learned

• The goal is a LIVING DOCUMENT so BALANCE is key:
  • Level of detail: BIG PICTURE (usually concept design phase comes later)
  • Robust decision making (not the kitchen sink)
  • Stakeholders engaged early and often (the right ones)
  • Good phasing, sequencing
  • Escalated costs (what will it cost when you are ready to build it)
Concept Plan as Preparation for full design phases

I: Introduction
• Introduction
• Visioning Process
• Mission & Vision
• Connection & Contribution to the Community
• Project Background

II: Securing the Future
• Other Local Attractions
• Project Comparables
• Site Selection Criteria

III: Programming the Future
• Welcoming Visitors
• Activities and Facility Program
• Audience and Attendance
• Objectives
• Visitor Narrative
• Messages, Threads, Stories
• Visitor Flow
  • Option A - "Rivers and Eddies"
  • Option B - "Sea Star"
• Donor Recognition
• Exhibit Content
Concept Plan as Community Engagement
Lessons Learned from the Field

• Short, public deadline (terms with City)
• Challenge: Establishing a brand while raising capital
• We are “in the forest,” so more lessons to come
The Importance of the Design Process

1974 Library – Conceptual leap for many; Conceptual images help with understanding
The Importance of the Design Process

**Concept Design**—Partnership with board/stakeholders and architects
The Importance of Strategic Planning

Figure 5
Map of Area Attractions
KidSTREAM

1 - California Science Center; 2 - Discovery Cube OC; 3 - Kidspace; 4 - Discovery Cube LA; 5 - Santa Barbara Museum of Natural History; 6 - MOXI; 7 - Zimmer Children’s Museum; 8 - Southern California Children’s Museum; 9 - Skirball Cultural Center
Note: Purple Star shows proposed location of KidSTREAM, Red circle shows location of former Gull Wings.
Source: GoogleMaps; ConsultEcon, Inc.
The Importance of Partnership

- All stages of development
- A Children’s Museum is a “Collective Vision”
- The timeline is shorter, but the village is bigger
Children’s Museum of Southern Minnesota

Founding Director

Knock Knock Children’s Museum

Inaugural Director

Region 5 Children’s Museum

Project Director
Children’s Museum of Southern Minnesota

- Business Plan
- Case Statement
- Strategic Plan
- Education Master Plan
Knock Knock Children’s Museum

- Business Plan
- Development Plan
- Communications Plan
- Operating Plan
- One Year Strategic Goals
Region 5
Children’s Museum

- Master Plan
- Site Selection Plan
- Capital Campaign Plan
- Communications Plan
- Business Plan
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<th>Board Governance &amp; Engagement</th>
<th>Administration</th>
<th>Finance</th>
<th>Development</th>
<th>Building &amp; Exhibits*</th>
<th>Operations</th>
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Fear no plan!

Lessons Learned:
- Prioritize plans by resources, timing, & goals
- Sequencing plans
- Board’s role versus ED versus PM
- Project management organization tools
- Relationships over transactions
- Museums that plan do better!
QUESTIONS?

COMMENTS?
A Complex Landscape

RAISING THE MONEY
- Fundraising Feasibility Study
- Capital Campaign Plan
- Brand Strategy, Communications & Marketing Plan
- Renderings, Fundraising Images

STRATEGY AND BUSINESS PLANS
- Strategic Plan (vision and impact)
- Business Plan
- Organizational Plan
- Socio-Economic Impact Study
- Needs Assessment
- Market & Economic Feasibility Study
- Pre-Opening Operating Plan

PROJECT MANAGEMENT and PRICING
- Total Project Costs and Schedule
- Construction Costs and Schedule
- Pre-Opening/Operating Plan
- Continuous Operations Plan
- Endowment / Operating Reserves

PLANNING for DESIGN AND CONSTRUCTION
- Programming & Building Brief: Strategic, Functional, Technical
- Master Plan
- Basis of Design
- Concept Plan
- Interpretive Master Plan

Why would you have questions?
Further questions? Feel free to contact us:

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