

**Interim Review of  
The Galt Museum and Archives  
Strategic Plan 2007 – 2014**

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# Interim Review of The Galt Museum and Archives Strategic Plan 2007 – 2014

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## Executive Summary

### ***Objectives:***

The Galt Museum and Archives (The Galt) is currently half-way through its strategic plan, *The Galt Museum & Archives Strategic Plan 2007 – 2014*. During a preliminary assessment of the organization's needs, three issues were identified:

1. The need to connect the strategic issues detailed in the strategic plan to its vision and mission for sustainability;
2. The need to ensure that partnerships entered into by The Galt are beneficial to the organization; and
3. The implementation of an integrated approach to evaluation that aligns with existing management practice and the current strategic plan.

This report will provide The Galt with a series of recommendations to take into consideration as they enter into the second half of their strategic plan's timeframe. The report explored the necessary elements of an organization that embraces an integrated approach to management, including nurturing a culture of strategic thinking, working with intent and purpose, understanding key stakeholder relationships, and having a deliberate and thoughtful process guide the organization through the strategic plan development.

### ***Methodology:***

The research methodology for this report included three phases. The first was a literature review to examine strategic planning processes in the museum sector, the role of stakeholder engagement, organizational purpose, evaluation and performance measurement and strategic management systems. The second phase was a review of internal documents produced by The Galt to determine if there was a strategic approach to The Galt's work. The third phase consisted of a series of in-person and telephone interviews with staff, board members, the CEO, and the consultant that lead the initial planning process. These interviews were conducted to gather information on the planning process, how the strategic plan is currently used within the organization and what evaluation and measurement strategies had been implemented. As well, community focus groups were held to clarify the relationships that The Galt maintains with community organizations.

### ***Key Findings:***

The literature review clarified that incorporating systems through all levels and functions within the organization and viewing the work of the organization as a whole rather than as a collection of separate parts, is a significant element of organizational success. As well, the literature confirmed that assessing organizational performance from an outcomes based approach, in addition to measuring outputs, provides an understanding of what difference the organization is making in the community

The interviews with staff, board members and the planning consultant, along with the community focus groups, provided the opportunity to determine the systems already established within the organization that were effective, and to build on those existing structures. It also provided the opportunity to examine gaps that were present, such as the discrepancy between the listing of performance indicators in the strategic plan and the lack of evaluation conducted by the staff of the organization.

### ***Conclusion***

As a result of literature review, examination of internal documents and interviews with staff, board members and community organizations, this report proposes five recommendations:

- 1. Ensure that the strategic issues connect with the organization's vision and mission***
- 2. Ensure that all information presented to stakeholders reflects the strategic plan, vision, mission and strategic issues of the organization***
- 3. Establish a set of criteria to establish mutually beneficial partnerships and relationships***
- 4. Establish a consistent practice of developing written agreement documents between The Galt and all partners to assist in determining if the partnerships have accomplished the intended outcomes***
- 5. Establish an outcome based approach to determine organizational success***

The Galt has demonstrated the characteristics of a strategic thinking organization, as it works from a holistic perspective, focuses on purpose and takes advantage of new and emerging opportunities. Building on the foundation already established within the organization, these recommendations will provide the organization with the steps necessary for an integrated approach to evaluation and connects its vision and mission to what the organization plans and accomplishes.

# 1. Introduction

Much has been written on the development of strategic plans, both in general and specifically for the museum sector. However, with the plethora of information on the development and implementation of strategic plans, little has been written exploring the importance of fully integrating evaluation as a part of the strategic planning process in museums.

In 2006 The Galt Museum and Archives (The Galt), located in Lethbridge, Alberta, launched a strategic planning process and the resulting document, *Galt Museum & Archives Strategic Plan 2007 – 2014*, was implemented in the fall of 2007. Following the establishment of the strategic plan, the *Galt Museum & Archives Business Plan 2009 - 2011* was generated detailing the operational aspect of The Galt's strategic issues identified in the strategic plan.

Sustainability and Capacity Building, Accessibility, Audiences and Market, Awareness, Infrastructure, and Relationships and Partnerships are the six strategic issues that form the basis of The Galt's strategic plan. Sustainability and Capacity Building is designed to assist the organization in developing and sustaining its resource base, supporting financial stability. Accessibility, Audience and Market and Awareness work towards ensuring relevant exhibitions, programs and collections that meet audience needs and build those audiences. Understanding existing and future infrastructure requirements is covered in Infrastructure and recognizing how to better serve current and potential partnerships within the community and region is managed through the strategic issue Relationships and Partnerships.

Integrated evaluation strategies were not incorporated into the strategic planning process conducted in 2006 and 2007, and research determined that this was an oversight in the plan's development. Though performance indicators and measures designed to gauge success of specific program areas were developed, the absence of an integrated approach has resulted in The Galt seeking ways to assess whether the strategic issues, and resulting actions, remain connected to the museum's vision, reflect the values of the organization and provide a strong foundation for the organization to ensure its sustainability.

The purpose of this report is to explore ways in which The Galt can ensure its operations relate to its vision, mission, values and strategic issues and integrate an approach to assessing the performance of the organization that takes into consideration its stakeholders, organizational culture and current management practice. The first section of the report provides a brief history of The Galt, the development of its strategic plan and the need for an integrated evaluation strategy. The second section provides an overview of the literature on strategic planning in the museum sector, specifically the significance of intentionality in museum planning, the role of stakeholder engagement and consultation in the planning process, performance measurement in museums, and the importance of a holistic strategic management system that incorporates a practice of evaluation and assessment. The next section describes the methodology used to conduct on-site research exploring The Galt's challenges. The fourth section presents the findings

realized from the research conducted at The Galt and an exploration of these findings in relation to the literature review. Finally, the report provides a series of recommendations for The Galt to consider regarding the connecting the strategic issues to the vision and mission, strengthening the processes concerning partnerships and implementing an approach to evaluation that can be integrated into its existing operations.

## **2. Background**

### ***2.1 The Client: History***

The community of Lethbridge, Alberta has been dedicated to preserving its history since 1888 when the Science and Historical Society was first established. In 1967, the Sir Alexander Galt Museum opened in the historic Galt Hospital building and was operated by the Lethbridge Historical Society until 1971 when it was turned over to the City of Lethbridge and subsequently administered as a municipal facility until 1998. The City then established a Council appointed Board of Directors to oversee the management of the museum and archives, and an arms-length governance structure was instituted.

Currently, The Galt collects, researches, preserves, exhibits and interprets over 20,000 artifacts and 300,000 archival documents and photographs that tell the story of Lethbridge and southwestern Alberta. The core business areas of the organization include Archives, Exhibits, Collections Management, Curatorial and Interpretive and Educational Programming. In addition, The Galt operates the Galt Museum Store, Facility Rentals and Special Events. All business areas are supported by Museum Administration, Marketing & Communications and the Volunteer Program.

A significant capital expansion project was completed by The Galt in the spring of 2006, increasing the museum's usable space by over 13,000 square feet. A new conservation laboratory and a Viewing Gallery overlooking the Oldman River Valley and the 100 year old High Level Bridge were included in the expansion. The Viewing Gallery was constructed as a revenue generating venue that could be rented for special events.

The Galt employs 20 staff members, including full-time and part-time positions. As well, the volunteer program manages 246 volunteers that contribute over 8,000 hours of time annually to all areas of the museum and archives. There are nine members on the Board of Directors appointed by Lethbridge City Council, and five individuals hold ex-officio positions on the board. The organization manages an annual operating budget of approximately \$1.2 million, with the majority of funds provided through an allocation from the City of Lethbridge. Additional funds are generated through admissions, museum store revenue, program fees and special events.

### ***2.2 The Client: Strategic Planning Process***

At the end of 2006, with the facility expansion completed, The Galt embarked on a strategic planning process guided by a Steering Committee and Planning Team, and facilitated by an external consultant. The Steering Committee, responsible for overseeing the planning process, was made up of three senior staff members, four board members and a representative from the City of Lethbridge. The Planning Team consisted of six staff members, four board members and five community members including representation from both the City of Lethbridge City Council and administration. Tasked with developing the strategic plan, the Planning Team participated in six workshops held over a period of six months, with the final document launched on October 18, 2007.

The plan was developed to “[set] the Galt Museum and Archives ... over-all business vision and direction, and is intended to inform its business plans, budgets and individual activity of paid staff, volunteers and board members alike for the next seven years.” and it lists six strategic issues and details strategies, goals and major initiatives for each issue (Galt Museum & Archives, 2007, p. 5). The goals within each strategy were assigned a series of performance indicators, though the specific performance objectives, and levels to be measured, are detailed in The Galt’s Business Plan rather than being included in the strategic plan.

The majority of the performance indicators developed for The Galt’s strategic plan require the measurement of quantitative data and include statements such as “number of grants received”, “sales per visitor”, “number of members in program”, “number of Memoranda of Understanding” (measuring the number of partnerships entered into by The Galt) and “total visitation”. A few of the performance indicators refer to qualitative evaluation methods such as visitor satisfaction and awareness scores, but the chart included in the strategic plan detailing performance indicators does not support outcome or impact evaluation methods that have become a significant part of the museum sector’s discussion on evaluation over the past 10 years.

The Galt’s performance measures were intended to be “continuously validated” (Galt Museum & Archives, 2007, p. 5) however, an integrated approach to assessing the work accomplished by the organization, and a method to monitor the strategic issues, was not established. As the performance indicators were developed as a separate component of the strategic plan and are not connected to how the strategic plan is assessed, the organization is currently grappling with how to measure its success and determine if the strategic issues remain connected to the museum’s vision, reflect the values of The Galt and are providing a solid foundation for the organization’s sustainability.

### 3. Literature Review

The literature review for this report focused on five subject areas: strategic planning, stakeholder consultation, organizational purpose and meaning, evaluation and performance measurement and strategic management systems. These topics were a natural grouping of the literature and followed a logical progression of working from a planning process, through engagement, understanding purpose, evaluating achievements and establishing a way to bring everything together.

These five subject areas were explored in relation to the issues facing The Galt, namely connection of the strategic plan to its daily operations, and integrating an evaluation approach that takes into consideration its stakeholders, organizational culture and the organization's current management practices. Museum sector specific books, peer reviewed journals and professional sector association publications provided an overview of these subject areas with reference to current museum management practice

#### 3.1 Strategic Planning

Strategic planning processes provide organizations with the opportunity for dialogue, to discuss what is important to and for the organization, and to introduce new ideas and frameworks (Liedtka, 1998). The discussions should take into consideration what is occurring within the organization, at all levels and across all functions, as well as the trends, forces, challenges and opportunities that are taking place outside of the organization (Liedtka, 1998).

Current museum practice asserts the role of planning as a significant component to museum administration. *The Standard Practices Handbook for Museums*, published by the Alberta Museums Association (2005), states four principles that museums should adopt with regards to planning:

- The museum uses planning to consider a range of possibilities and priorities, and to clarify its actions and decisions.
- Planning is based on realistic projections of the museums capabilities.
- The museum's governing body consults with staff and stakeholders in developing and evaluating objectives and programs.
- Individual initiatives undertaken by the museum are supported by a planning process (Alberta Museums Association, 2005, p. 90).

Lord and Markert (2007), in their book *The manual of strategic planning for museums*, state that strategic planning "provides the museum staff and board with the opportunity to determine the optimal future for the museum and the changes required to achieve it...agreed in a process of self-assessment, study and debate" (Lord and Markert, 2007, p. ix). This book is a guide for museums, detailing the steps necessary to develop a comprehensive strategic planning document. A chapter dedicated to plan evaluation does focus on the Board of Director's role in monitoring the accomplishments achieved under the strategic plan, though incorporating the plan across functions and organizational

levels within the museum and how evaluation can be integrated into the ongoing work of the museum is not discussed.

According to Genoways and Ireland (2003), a strategic plan is a document that includes a mission statement, external assessment, internal assessment, defined strategic issues or goals, objectives or work plan and a discussion of implementation (Genoways and Ireland, 2003). The planning document “delegates responsibility, establishes deadlines and a system of evaluation, and facilitates daily decision making” (Genoways and Ireland, 2003, p. 75), yet within their book, *Museum administration*, only one paragraph is dedicated to evaluation in relation to a museum’s strategic plan.

A museum has to identify what value it presents to its stakeholders as well as where it is located within its community, and its role in society. Michael Porter, in his address to the American Association of Museums annual conference in Boston, April 2006, detailed the importance of a museum identifying its unique value proposition; that a museum understands what is distinctive about the organization and base its strategies on this declaration (Porter, April 28, 2006). Creating a unique and valuable position, choosing what not to do, and ensuring these correspond with an organization’s activities, will distinguish one organization from another, and is known as strategic positioning (Porter, 1996). Mintzberg defined strategy as a position, that is “the mediating force...between the internal and the external context” (Mintzberg, 1987, p.15).

Porter states that “measuring value is central to any strategy” (Porter, 2006, p. 10) and this can be done in museums by examining the specific goals set the various functions of a museum. These goals are then aligned with the questions a) who are the museums customers, b) what are their needs, and c) what price (or resource allocation) is necessary (Porter, 2006). This view is echoed by Bryson, who said that “[c]reating public value means producing enterprises, policies, programs, projects, services or infrastructures (physical, technological, social, etc.) that advance the public interest and the common good at a reasonable cost” (Bryson, 2004a, p. 8).

Porter (2006) further suggests that museums test a strategy against a set of five questions:

1. Is it a unique value proposition compared to other organizations?
2. Is it a different, tailored value chain?
3. Are there clear tradeoffs?
4. Do the activities fit together and reinforce each other? and
5. Is there continuity of strategy with continual improvement in realizing the strategy?

The result of the responses to these questions will be a truly strategic approach.

### **3.2 Stakeholder Consultation and Engagement**

According to Bryson (2004a), an organization must first identify those individuals and organizations that influence the organization, and those who are impacted by the organization’s actions: their stakeholders. The task of engaging with stakeholders can be time consuming and labourious, but the outcome can be invaluablely rewarding.

According to Bryson, “[a]ttention to stakeholders is important throughout the strategic management process because ‘success’ for public organizations – and certainly survival – depends on satisfying key stakeholders according to their definition of what is valuable” (Bryson, 2004b p. 5).

Stakeholder analysis should include identification of key individuals and organizations, a description of the relationship each has with the museum, and an understanding of the importance of their relationship with the organization. It is also critical to have insight into what the stakeholders value about the organization to address stakeholders needs effectively (Murray, 2006).

Mitchell, Agle and Wood echo the significance of an organization recognizing a stakeholder’s power to influence an organization, the legitimacy of a stakeholder’s relationship to organization and the urgency of a stakeholder’s claim on organization (Mitchell, Agle and Wood, 1997). The authors agree with Murray and Bryson that identifying the type of relationship a stakeholder has with an organization is vital in fulfilling the requirements of an organization’s stakeholders.

### **3.3 Organizational Purpose**

Defining an organization’s mission – its purpose – is integral to the success of the strategic plan, and of the organization. However, this is not the only tool that an organization should use to assess its success (Korn, 2007b). Korn proposes that when an organization evaluates its mission, and explores the various functions of a museum from a whole organization perspective, it can assist in determining the value placed on the organization by its stakeholders. In addition, Korn asserts that mission evaluation positions evaluation as a core function of leadership, an inquiry process, and as a means for creating an organization that continually learns from evaluation (Korn, 2007a).

Intentionality, culture of inquiry and strategic thinking are all concepts that look beyond the implementation of a mission statement, vision statement and a series of goals. Korn states, “[t]o assess effectiveness, museum staff must write intentions that succinctly describe concepts of what they want to achieve; for survival in the twenty-first century, these intentions must focus on the impact staff envision for the public and the museum’s community” (Korn, 2007b, p. 257). She further writes that there are three characteristics to create intentionality; 1. operating holistically, seeking active participation of all museum staff and board, 2. fostering a culture of inquiry, and 3. promotion of planning and evaluation as interdependent processes (Korn, 2007b, p. 260).

These elements of intentionality connect directly with Liedtka’s definition of a strategic thinking organization. Liedtka has defined five characteristics of a strategic thinking organization as follows:

1. Employing a holistic approach to its work;
2. Focusing on its intent, the organization’s purpose;

3. Ensuring interconnectivity between the past, present and future of the organization;
  4. Testing its ideas and is hypothesis driven; and
  5. Recognizing and taking advantage of new and emerging opportunities
- (Liedtka, 1998).

Organizations that nurture these characteristics of strategic thinking are better positioned to embrace the learning that an attentive strategic planning process can provide. Korn's theories advocate for a holistic approach to thinking about the organization. She also suggests that a museum that embraces intentionality encourages a learning organization that continually examines itself and the environment in which it exists and then evolves to meet the challenges it faces (Korn, 2007b).

The importance of both strategic planning and strategic thinking in successful organizations is explored by Graetz (2002) where the author discusses the need for balance between the "logical, systematic, conventional, prescriptive and convergent" that is present in traditional strategic planning processes and the "synthetic, divergent, creative, intuitive and innovative" that is present in strategic thinking (Graetz, 2002, p. 457). "Recognizing and valuing the creative tension between strategic thinking and planning provides a powerful driving force within the strategy-making process" (Graetz, 2002, p. 461).

Douglas Worts and the Working Group on Museums and Sustainable Communities developed a *Critical Assessment Framework* to examine the relationship between a museum program and its community (2006). In a personal communication with Worts he agreed that the *Critical Assessment Framework* could be adapted by an organization to explore the impact of a museum's vision and mission on individual members of the community, determine that there is a benefit to the community at large, and within the museum, confirm whether the statements reflect an evolving organization that adapts when faced with challenges (Worts, 2006, p. 46). Though some of the questions asked in the Framework may have to be adjusted, they provide an organization with the opportunity to explore how the mission connected to a variety of outcomes (Worts, Personal Communication, November 10, 2009).

Assessing the mission, or vision, of an organization is only one tool to confirming an organization's purpose. Articulating how an organization is unique, what it does well and understanding the environment that surrounds the organization, as the result of an attentive, deliberate and thoughtful planning process, will assist an organization in realizing the goals that it establishes. As well, nurturing a culture that embraces the characteristics of strategic thinking and intentionality will position the organization to work from an inclusive perspective, taking into consideration all of its functions, and its structure.

### 3.4 Evaluation and Performance Measurement

In Falk and Sheppard's *Thriving in the knowledge age: new business models for museums and other cultural institutions* the authors state that "[c]learly it is far more difficult to measure the success of an organization than it is to measure the success of a particular exhibition or program; but just because it is more difficult does not mean that it is any less important" (Falk and Sheppard, 2006, p. 233). Davies, in Moore's *Museum management* (1994), states that "the acid test of commitment to a strategy is the monitoring of it and what use is made of it" (p. 58). In 1994 Davies surveyed senior museum managers of local authority museums in England to determine the level of understanding and practice of strategic planning. He concluded that museums had been using strategic plans as more of a "communication tools rather than analytical tools" (Davies, 1994, p. 67). None of the museum managers surveyed related their plan to their museum's performance, and the findings suggested that "a corporate lack of commitment to performance review" existed within the museum sector (Davies, 1994, p. 58).

Identifying specific criteria (Korn, 2007a), ensuring connection to the organization's mission (Anderson, 2004; Baeker, 1998; Korn, 2007b; Krug and Weinberg, 2004; Mollenhauer, 2005; Soren, 2000), demonstrating impact (Krug and Weinberg, 2004; Mollenhauer, 2005; Sawhill and Williamson, 2001) are important factors to take into consideration when developing an integrated approach to evaluation. Organizations also need to understand their internal capability and capacity in managing a performance management system to ensure success (Baeker, 1998; Mollenhauer, 2005; Paulus, 2003; Sawhill and Williamson, 2001).

With increased accountability measures demanded by government and other funders, museums have been faced with implementing systems to measure efficiency, outputs, outcomes and sustainability (Baeker, 1998; Weil, 2004). Baeker attempted to set a standard for performance measurement in Canadian museums in 1998. He states that "[e]very organization must develop a performance measurement system suited to its unique needs." (Baeker, 1998, p. 3). The elements Baeker advocates are a listing of what is necessary to measure performance in a museum, however, it is presented as a stand-alone, quantitative based process, and is not integrated into the overall work of the organization.

There has been a movement away from solely measuring the outputs of an organization; the numbers and statistics that tell only part of the story. Outcome evaluation, and measuring the impact of an organization on its constituents, has gained significant ground within the museum sector over the past decade. Weil (1999; 2004), Korn (2004; 2007b) and Worts (2004; 2006), all advocate for museums to determine what they want the impact of their organization to be in the community and to discern whether they have been successful in achieving this impact as a form of performance measurement and assessment. The Balanced Scorecard is one performance measurement device that assists an organization in measuring four elements to gather a comprehensive depiction of an organization's success. It links the customer, internal business processes, learning and growth and the financial perspective by asking four questions:

1. How do customers see us? (customer perspective)
  2. What must we excel at? (internal perspective)
  3. Can we continue to improve and create value? (innovation and learning perspective)
  4. How do we look to shareholders? (financial perspective)
- (Kaplan and Norton, 1992, p. 72)

A museum must explore the difference it is making, “differences in skills, knowledge, attitudes and values” (Weil, 2004, p. 33), and examine the way in which it manages all of its functions, viewing the work of the organization from a holistic, purpose centred approach, integrating evaluation and assessment tools as part of the whole system. Falk and Sheppard have adapted the balanced scorecard approach to the needs of the non-profit sector, and specifically for museums, building on the four perspectives of the Balanced Scorecard. The T.H.R.I.V.E. assessment, “Tools for Helping maximize Resources, Internal learning and growth, public Value and External relationships” (Falk and Sheppard, 2006, p. 234), maintains the importance of the balanced scorecard’s approach and proposes four components that museums can use as guides to develop targets and measures which more accurately reflects the work of museums. (p. 235)

1. Public Value (How well is the museum meeting its mission?)
2. Internal Learning and Growth (How is the museum fostering a learning organization, including staff and board?)
3. External Relationships (How does the museum develop and maintain successful relationships?)
4. Resources and Finances (Are the financials of the museum tied directly to the organization’s goals and outcomes?)

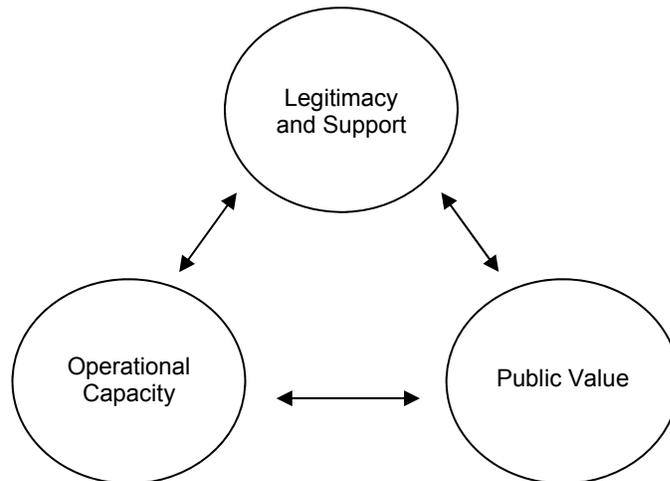
### **3.5 Strategic Management System**

Four years after the initial publication of their balanced scorecard approach to performance measurement, Kaplan and Norton discussed the use of the balanced scorecard as a strategic management system (1996). As a strategic management system, the four elements of the balanced scorecard are incorporated into four management processes, “link[ing] a company’s long-term strategy with its short-term activities” (Kaplan and Norton, 1996, p. 2). The first, translating the vision, assists manager is having all staff take ownership of the vision and mission. The second element, communicating and linking, is an approach to convey the strategy to all levels within the organization. Thirdly, business planning, integrates strategy with financial plans and the fourth management process is feedback and learning, providing processes to receive and apply feedback from customers and internal stakeholders to strengthen the organization.

Weinberg and Lewis (2009) discuss a public value approach to strategic management by presenting Moore’s Strategic Triangle as a way to connect community, value and internal competence. The Strategic Triangle focuses on three areas, 1. public value creation, 2.

operational capacity and 3. political management in the authorizing environment (Weinberg and Lewis, 2009, p. 258).

Figure 1. *The Strategic Triangle*  
(Moore and Moore, 2005), in Weinberg and Lewis (2009)



Weinberg and Lewis state that “the Strategic Triangle’s utility as a performance measurement system is better suited for public and nonprofit management than the balanced scorecard is for three reasons:

1. In public and nonprofit work, while financial measures are crucially important, they are a means rather than an end.
2. The ‘customer’ is more complex, as public organizations have both recipients of services as well as ‘third party payers and upstream customers’.
3. Public organizations are often reliant on other organizations as partners in the delivery of services rather than focusing on a single-firm competitive advantage.”  
(Weinberg and Lewis, 2009, p. 261)

Bryson’s Units of Integrated Management Approach (2004a) provides an inclusive system that connects with Liedtka’s characteristics of strategic thinking referred to above, though it focuses on a results-based approach to evaluation and management that does not provide room for assessing the impact of the organization on its community. This approach advocates “[linking] inside and outside environments in effective ways through development and implementation of an integrated set of strategies across levels and functions of the organization” (Bryson, 2004a, p. 271). The principles of Bryson’s Units of Integrated Management are as follows.

1. Importance of a strong and clear vision for the organization: connects an organization’s work to the vision, and advocates that the vision be reflected in the results of the organization

2. Working holistically: includes incorporating all functions within the organization, all levels within the organization structure, as well as understanding the external environment and where the organization is positioned externally
3. *Lines of Business* approach: ensures that the organization works cross-departmentally, but that the entire organization understands the role of each function or department and how that department relates to their own business area
4. Use of a balanced scorecard: reiterates the importance of working holistically, understanding the role of all areas within the organization and its external environment
5. Results identified through strategic and operational planning: desired results are identified for the organization as a whole, each line of business, and individual departments through both operational and strategic plans
6. Accountability for results: organizations should be accountable for the best possible performance while ensuring that their performance is aligned with and supports overall efforts as a whole

(Bryson, 2004a, p. 273)

Though, having a results oriented approach to strategic management eliminates the importance of impact, of implementing an outcomes based approach to assessing an organization's success.

### **3.6 Summary**

Reviewing strategic planning, stakeholder consultation, organizational purpose, evaluation and performance measurement and strategic management systems provided a foundation to assess the issues facing The Galt. The literature clarifies that understanding the importance of incorporating systems through all levels and functions within the organization and viewing the work of the organization as a whole rather than as a collection of separate parts, is a significant element of organizational success. With regards to stakeholder consultation, an organization must consider the types of relationships stakeholders have with the organization and how these relationships influence decision making and how partners are impacted by decisions and actions of the organization. Clearly defining partnership relationships is a start to fulfilling stakeholders' needs. The literature review also verified that nurturing an organizational culture that encourages flexibility, and provides opportunities for reflection, creates a strong foundation for an integrated approach to evaluation.

## **4. Methodology**

### **4.1 Overview**

The research for this report was conducted in three phases. The first was a literature review, presented above, and the second consisted of a review of internal documents, including the *Galt Museum & Archives Performance Measures 2004 – 2007*, *Galt Museum & Archives 2008 Annual Report* and the *Opportunities for Improvement (Action Plan Review)*. The review of internal documents was conducted to determine if the organization had employed a strategic approach and demonstrated alignment with the strategic plan. The documents were examined to see how information was presented to stakeholders and how the strategic plan and its results were positioned with stakeholders.

These two phases were intended to determine the organization's commitment to a strategic approach in its work. The third phase consisted of on-site and telephone interviews with key internal stakeholders to gather information on the initial planning process, current use of the strategic planning document and to determine whether the organization was prepared to enter into an integrated evaluation approach. Focus groups with community partners were also held at The Galt to clarify The Galt's relationship with the museum's external stakeholders.

### **4.2 Stakeholders**

Current senior and front-line staff of the museum and archives, board members, the current CEO and the external consultant who facilitated the initial planning process were identified as key stakeholders for this report. As well, organizations that presently maintain a partnership or relationship with The Galt were identified as external stakeholders, and invited to participate in community focus groups.

At the request of the researcher the CEO of The Galt selected four staff members who represented senior level and front-line positions. The individuals selected were either a member of the Planning Committee, or were on staff when the planning took place, so that they could speak to the initial process and how the organization has changed since the plan's implementation. The CEO contacted each of the staff members by email, on behalf of the researcher, requesting their involvement in the research project. The CEO also invited two current board members to be interviewed. The researcher then requested, by email, individual interviews with the CEO and the external consultant.

In addition, ten organizations were invited to participate in community focus groups held at The Galt. The focus groups were scheduled on two days, providing participants with an alternate if they were not able to make one of the scheduled times. A total of five organizations responded to the invitation and each sent a representative to the focus groups. Four individuals represented organizations in the first focus group and one organization's representative was interviewed separately at the scheduled second focus group.

### **4.3 Process**

Interviews with the CEO, staff and one board member took place in-person and on-site at The Galt over the course of two days. The second board member was interviewed by telephone and the external consultant was interviewed in-person at the researcher's residence in Calgary, Alberta. Consent forms were provided to each participant prior to the start of the interview. The researcher reviewed the consent form with the participant and provided time for the individual to read the document prior to signing two copies, one of which was handed to the researcher to keep on file.

The researcher asked a series of questions designed for each interview group of staff, board members, CEO and Consultant, and written and took notes during the interview session. Copies of the interview schedules and questions are attached as Appendix 1. As the interviews were semi-structured the researcher asked additional questions during the interview that were not in the original script, based on the information communicated during the interviews. A total of six interviews were conducted lasting an average of 60 minutes. The interviews with the CEO and consultant both took over 2 hours to conduct.

The focus groups were held on-site at The Galt and facilitated by the researcher. Four organizations were represented at the first scheduled focus group and one organization attended the second scheduled focus group. As only one individual was present the researcher chose to conduct an interview rather than a focus group. This individual was interviewed using the same questions designed for the focus group discussion. A written document stating the museum's Vision and Mission Statement, its Values Statement and a listing of the six strategic issues in the strategic plan, were provided to participants to review during the session (See Appendix 2).

### **4.4 Data Analysis**

The data from all of the interviews were recorded and responses were grouped into themes under each question. A summary document was generated recording the key commonalities among participants' responses. Staff, Board of Directors, external consultant and the CEO responses were grouped into the theme of staff and board roles and responsibilities in the planning process and how the vision, mission and strategic issues are reflected in current operations, with reflections on Liedtka's characteristics of a strategic thinking organization. Another theme was a discussion of current performance measurement processes and what was currently established as evaluation methods within the functions of the organization. The role of partnerships in the organization and the process to assess successful relationships was another grouping. How the strategic plan will impact future work and what improvements could have been made to the planning process were also grouped as themes.

This process of grouping and summarizing was then duplicated for the focus group response with the focus group responses categorized according to the four questions asked of the community partners. Themes from the documents summarizing the research were then used to inform the findings of the literature and determine the common elements.

One challenge to the research methodology was the low level of participation in the community partner focus group sessions. Originally ten organizations were identified as key stakeholders that should be involved in the review process but only five organizations participated in the scheduled sessions. Though the additional five could have provided new and different information, those that did attend were highly engaged in the focus group and put forward opinion and information that was extremely useful in determining how community stakeholders view The Galt.

## **5. Findings and Discussion**

### **5.1 Overview**

The Findings and Discussion section of this report explores the combined results of the review of The Galt's internal documents, including the *Galt Museum & Archives Strategic Plan 2007 – 2014*, *Galt Museum & Archives Performance Measures 2004 - 2008* and the *Galt Museum & Archives 2008 Annual Report*, and the responses to the interviews with The Galt staff, board members, CEO, consultant, and the community focus groups. The findings were considered within the context of the literature review conducted to examine strategic planning, stakeholder consultation, organizational purpose, evaluation and performance measurement and strategic management systems.

### **5.2 Strategic Planning**

When discussing the planning process used by the Steering Committee and Planning Team, the external consultant hired to facilitate the planning process explained that he used Bryson's ten-step Strategy Change Cycle (2004a, p. 33). A copy of this strategy cycle is included in Appendix 3. The consultant consciously chose to incorporate Bryson's process with the approach described in Rogers, Finley and Galloway's *Strategic planning for social service organizations* (2001), a technique that he had employed successfully with other organizations. Rogers et al promote a four step process that has the organization exploring their internal and external environment and then identifying critical issues. The second step is defining the organization's purpose and strategy; the third is to turn this strategy in to action plan. Lastly, the organization implements the strategy and actions and measures progress and performance (Rogers, Finley and Galloway, 2001, p. xviii). By incorporating Bryson and Rogers et al, the consultant made one significant change to Bryson's strategy cycle – to develop the vision for the organization as step one, rather than as step eight (see Appendix 3). According to the consultant, this provided a guide for the rest of the process, and broadened the thinking of the group so that the team did not become narrow in its scope.

The process used by the Planning Team, comprised of six staff members, one long-term volunteer, four Board members and four key community stakeholders, was high participation and high inclusion. All members had to contribute during sessions and complete research and assignments outside of scheduled team meetings. The consultant

was aware that the organization had recently completed an exhaustive capital campaign and that there was burn out among the staff, Board members and volunteers and this was taken into consideration when developing the activities for the team. The consultant instituted an approach that was based on consensus, was democratic and ensured that there was a balanced presence at the table; all members of the team were considered equals no matter what position they held within the organization's hierarchy.

An organizational "high/low" exercise was performed to explore what had taken place in the organization over a period of years leading up to the strategic planning process. A S.W.O.T. Analysis was conducted to understand both the internal and external environments influencing The Galt (A S.W.O.T Analysis is a tool used to assess the strengths, weaknesses (internal review) and opportunities and threats (external environment scan), that are facing an organization.). Identifying the type of relationship stakeholders have with an organization is integral to satisfying the needs of these stakeholders (Bryson, 2004b; Mitchell, Agle and Wood, 1997; Murray, 2006). The Galt developed a list of partners, both current and past which formed the basis of the stakeholder consultation. Tools, such as the web-based survey instrument Survey Monkey, were used to gather information from a variety of key individuals and organizations. The consultant explained that the stakeholder engagement or consultation should be completed by the organization as the cost would have been prohibitive if only the consultant conducted the process.

During the initial planning phase the consultant administered a questionnaire to the staff of The Galt based on the *Standard practices handbook for museums*, published by the Alberta Museums Association (2005), to determine if the organization was working to accepted museum standard. This provided an objective metric, a benchmark, to ascertain if the organization was accomplishing the work it is supposed to as a museum.

At the end of each of the six planning sessions the consultant asked the team what "big issues" emerged for each member. This process prepared the team to respond to "what questions should the plan answer". With the team's permission, the consultant synthesized the overlapping issues that were raised over the course of the six months and, at the end of the sessions, he presented a draft of the strategic issues. To determine if these were the right issues for the organization to address, the consultant implemented Bryson's Direct Approach to Strategic Issue Identification (2004a, p. 164) which asks three questions for each issue:

1. What is the issue?
2. What factors (mandates, mission, external and internal influences) make it a strategic issue?
3. What are the consequences of failure to address the issue?

The Galt Planning Committee asked each of these questions to the issues presented by the consultant. With those that were determined to be strategic issues, the team condensed the list further by using "dotmocracy", a tool employed by facilitators to reduce large amounts of information through a voting process. The resulting six issues were then

agreed upon by the Planning Team: Sustainability and Capacity Building, Accessibility, Audiences and Market, Awareness, Infrastructure, and Relationships and Partnerships.

### ***5.3 Stakeholder Consultation and Engagement***

The Galt's strategic plan illustrates the significance placed on understanding the external environment that is impacted by, and influences the organization. This is evident by the amount of work conducted throughout the plan's research phase, as well as during the development of the strategic issues.

The Planning Committee conducted a situation assessment that explored trends of changing attitudes, local issues, visitor experience, the role of a museum in society, and global issues. Then the top needs and issues of external stakeholders were identified, including the areas of community relations, communications, exhibit space and funding. Stakeholders were also asked for the criteria they would use to measure The Galt's success. These criteria included how the Galt is positioned within its markets, its deployment of volunteers, and their personal assessments of the level, quality and growth and accessibility of The Galt's programs and exhibits, the museum's financial stability and its professional reputation. External research documents were also reviewed as a part of the environmental scan presenting potential audience development strategies.

During the individual staff interviews, when asked about how partnerships are identified and managed within the organization, staff responded that they do not have a formal process for managing partnerships. The relationships range from verbal agreements to legal Memoranda of Understanding. Staff stated that the partnership did have to be "two way", that there needed to be a mutually beneficial reason to enter into the partnership, but that traditionally each relationship has been handled on a "case by case" basis.

When presented with The Galt's current mission, vision and values statements, community focus groups stated that they still felt comfortable with the values of the organization and that the statement spoke strongly to the work of The Galt, specifically creativity, quality and collaboration. A comment was made that there was not as much ingenuity as there was five years ago when the organization was "flying by the seat of their pants", but that it can't be expected that an organization would be in "high gear" all the time.

Focus group participants expressed some concern that the organization was stepping away from its mission statement. For example, The Galt mission states that it is focused on human history but exhibitions on dinosaurs are displayed. Participants also stated that they believed the vision was more of a reality than a goal to aspire to, that the vision wasn't very visionary and the phrase "gathering place" has become overused by too many organizations.

With the extensive consultation that took place during the strategic plan's development, questions were not asked to determine what the stakeholders value about The Galt, or to understand or describe the specific relationships the organization has with each of its

partners. Even though the needs of stakeholders had been identified, these declarations may be different from what a stakeholder values.

#### **5.4 Organizational Purpose**

A mission statement should answer three questions: why does the museum exist; who is the audience served; and what is the business of the museum (Anderson, 2000, p. 25). The Galt's mission statement successfully answers these three questions. However, it is unsure if the current mission accurately reflects the work of the organization. In reviewing internal documents and through in-person interviews with staff, it is evident that the vision and mission statements impact the daily responsibilities of the organization. Staff interviewed responded that, along with having ongoing goals and outcomes relate to the strategic plan, they ensure that new initiatives connect to the vision and mission, as well as to the strategic issues, before embarking on additional projects or programs.

Organizations that encourage a culture of strategic thinking connect planning and operations, focus on the organization's purpose, and link the past, the present and the future. In addition, such organization's leaders tests ideas and recognize and take advantage of new and emerging opportunities (Liedtka, 1998). The in-person, one-on-one interviews provided the opportunity to see relatively quickly that the organization worked in a holistic manner. As well, it was clear early on in the process that the characteristics of a strategic thinking organization existed at The Galt.

The organizational overview in The Galt's *2008 Annual Report* summarizes the interconnectivity between functions at the museum by listing the areas that each function supports internally. For example, when listing the role of the exhibitions function it states, "supporting programming, Archives, Administration, Collections, Special Events and Gift Shop" (Galt Museum & Archives, 2009a, p. 2)., and with the Interpretive and Educational Programming department it states that it "work[s] with other departments to ensure that visitor needs as related to learning, interpretation and connectivity are enriched and enhanced." (Galt Museum & Archives, 2009a, p. 3).

This connection between departments and the understanding of how each unique function at the museum relates to other areas of operation was also apparent during the individual interviews with senior and front-line staff at The Galt. One senior staff person explained that The Galt has established internal committees with cross-departmental representation for exhibition and program development. As well, the gift shop works with curatorial staff to ensure that products are brought in that connect with upcoming exhibitions. Those in support services cultivate ongoing relationships with all areas in the museum to ensure that all staff are using the operational systems accurately, and are generating practical information for the organization to use in measuring its performance.

Another example is the way in which staff meetings operate. Occurring every two weeks at The Galt, all members of staff have the opportunity to discuss with the group what projects they are working on and how these projects may impact other areas within the

organization. This dialogue is encouraged informally as well, as was the case when one staff member had completed a project and called the rest of the staff to his work area. An impromptu workshop was held showcasing how a case for an in-house travelling exhibition was put together and would work once on site at an external venue. Though some staff felt that more could be done to encourage an understanding of all areas within The Galt, there is an awareness of the importance of working together for the overall health of the organization.

When asked to relay one or two strategic issues that related to their current work, both senior and front-line staff were able to connect their daily responsibilities to the organization's strategic plan. Though not all responses were as specific as the strategic issues stated in the plan, they were associated with the intent of the issue. For example, interview responses included establishing The Galt Museum Store as a profit centre (Sustainability and Capacity Building), identifying gaps in the collection (Accessibility), and development of external partnerships (Relationships and Partnerships). This connection speaks to the focus on intent characteristic described by Liedtka and The Galt staff's awareness of the purpose of the organization and how their work directly links to the goals of the museum.

According to the CEO, The Galt's mission statement expresses the museum's responsibility to not only tell the history of the region, but also for the organization to take responsibility for sharing its own internal history and to guide the organization's future. During the research, board members conveyed that they endeavoured to maintain the importance of connecting the past, present and future of the organization by hiring the previous CEO, as a consultant to participate in the planning process. This individual was with the organization through the capital expansion, and initiated the strategic planning process, though resigned from the organization just as the groundwork for the strategic plan was getting underway. The Board of Directors felt that it was important for the individual to participate in the process to provide a direct connection to the organization's past. He remained involved with the development of the plan and provided input throughout the process.

The Galt recognizes the importance of testing ideas, taking risks and learning from the experiences, both positive and negative, to create more effective and efficient programs and processes. The Board of Directors embraced this characteristic of a strategic thinking organization during the development of the strategic plan. The Planning Committee tested its ideas by talking to stakeholders, asking questions and gathering feedback before settling on specific issues and goals. The Galt staff interviewed for this report explained that they frame new programs and projects as tests or pilot projects. The CEO clarified that this provides a safety net for staff. The CEO fosters a culture that believes "it's OK to fail meaning it's OK to risk." As part of the organizational culture at the museum, this thinking empowers staff to initiate new programs and ideas without fear of being reprimanded.

The Galt identifies and takes advantage of new opportunities in all areas of its business. From embracing social media including a Facebook site, Twitter account and Flickr page,

to participating in community initiatives such as the City of Lethbridge's *Heart of the City* campaign, The Galt recognizes the importance of accepting opportunities when they are presented. This is also evident in the 2008 Annual Report document with the listing of special events such as "Galt Beer Tasting" and "Galt Babies Birthday Party", occurrences that are not traditionally associated with a museum or archives. The CEO has established a culture that allows the organization to adjust and adapt when necessary to the changing needs of their stakeholders, new audiences and to accommodate new initiatives and projects. The Galt has also started to set aside time for organizational reflection and growth, whether it be group discussion on a particular relevant article, or establishing a regional museum network with likeminded peers.

### **5.5 Evaluation and Performance Measurement**

The Galt's strategic plan includes specific performance indicators for each strategy listed under the six strategic issues (Sustainability and Capacity Building, Accessibility, Audiences and Market, Awareness, Infrastructure, and Relationships and Partnerships). During the interviews with current senior and front-line staff, the researcher asked how the performance indicators were integrated into the work of the various departments and responses indicated that they were not integrated, and that some performance indicators were not being monitored. Board members stated that evaluation was an area of deficit in the process, and that they are still grappling with how to fully review the strategic plan.

The CEO has established a semi-annual check-in with staff, and the Board of Directors have incorporated the strategic plan into the annual performance review of the CEO, establishing a foundation of assessing the work of the strategic plan in relation to the organization's operations.

There has been discussion within the organization regarding the difference between outputs and outcomes and that The Galt does not want to just be focused on outputs and quantitative information gathering. However, the goals and performance indicators detailed in the strategic plan, focus on output measurement. Staff expressed that The Galt does not want to be caught in a "numbers game", in which each year an increase has to be expected. This is not the business of a museum, as museums have numerous bottom lines to consider. To this end, there is mention within The Galt's strategic plan of using a "balanced scorecard tool". Yet from the staff and board interviews it was apparent that no such tool had been established.

The Galt's *Visitation Building Strategy* was developed to measure local attendance and tourist visitation in relation to stakeholders' expectations and the organization's mission, vision and mandate. The museum was to determine performance indicators other than attendance and develop systems to capture and track audience and customer feedback to use in the development of programs and marketing. However, The Galt has not implemented a method of measuring the impact of their programs and services within the community or with their on-site visitors.

Within The Galt's *Human Resources Strategy* the organization focuses on succession management, cross-functional training, and attraction and retention of staff. This concentration on the individual and institutional need for development and training connects directly with the importance of internal learning and growth described in the T.H.R.I.V.E. Assessment. Falk and Sheppard state that "in addition to traditional training, employees need mentors and tutors, as well as the encouragement to develop and support informal 'knowledge-sharing' groups" (Falk and Sheppard, 2006, p. 236). The Galt has now begun work on a knowledge-sharing group with the establishment of the Southern Alberta Regional Museum Alliance.

With regards to external relationships, Falk and Sheppard state that museums need to develop "clearly articulated goals and objectives for how it intends to build and sustain [the] various relationships and then monitor and measure its success at satisfying those goals and objectives" (2006, p. 237). The Galt recognized that engagement and consultation with stakeholders was an important part of the plan's development process and as a result, *Relationships and Partnerships* was included as a strategic issue. Though this strategic issue has been worked on by The Galt since the plan's implementation, the organization is unclear as to the purpose or benefit of certain partnerships and relationships and would like to implement a system to ensure partnerships are mutually beneficial. The Galt has developed specific goals, initiatives and performance indicators for their *Relationships and Partnerships* strategy, and when discussing this with current and previous stakeholders during the community focus group sessions, the organizations represented had not been approached expressly for feedback in relation to The Galt's strategic plan. Nor had information been requested from the community stakeholders relating to measuring the success of the existing relationship or partnership.

Though the financial bottom line is not the central outcome in a non-profit organization, it is an important one from presenting budgets to the Board of Directors to reporting to funders and donors. The Galt has a strong understanding of the importance of measuring resources and finances. A one page summary document *Performance Measures 2004 – 2008* lists information in a dashboard format including donations and grants, Museum Store gross revenue and facility rental revenue for 2004, 2007 and 2008, comparing and contrasting the year before the facility expansion project was initiated, the year after the facility reopened and this past year's performance. With the fact that the majority of performance indicators included in the strategic plan are quantitative in nature, the current evaluation and performance measurement methods used by The Galt do not support an outcome based approach to evaluating The Galt's success. Nor does the existing goals and performance indicators measure the organization's impact on the community it serves; "[o]utputs are not evidence of accomplishing one's mission, but they are easy to measure and benchmark and they help to provide a tangible way to gauge the process by which the museum is trying to accomplish its mission" (Falk and Sheppard, 2007, p. 235).

## **5.6 Strategic Management System**

A strategic management system provides an organization with the opportunity to work holistically and purposefully while ensuring flexibility to adapt when situations call for modifications to a particular tactic. Bryson (2004) lists eight elements of a successful strategic management system as follows:

1. Apply the strategic management system to the whole organization.
2. Build on performance measurement and management approaches already in use in the organization.
3. Focus on a small number of key results and indicators.
4. Use a common set of categories for performance measures.
5. Connect performance measures to specific programs, services and activities.
6. Support the linking of organizational performance and individual performance.
7. Use the strategic management system to support planning, decision making, budgeting, evaluation and learning.
8. Review and update the system on a regular basis.

(Bryson, 2004, p. 291)

The Galt's strategic plan includes a list of performance indicators to "determine performance in executing the Strategies and Major Initiatives". The researcher found that these indicators have not been incorporated into the operations of The Galt, resulting in a disconnect between the work accomplished and the determination of the organization's success.

The members of the Board of Directors interviewed for this report discussed the importance of having the vision and mission as a focal point of the planning process. Both board members mentioned the fact that the consultant brought the statements out at various points during the development of the plan to remind the team of what they were working towards proved very helpful. These statements have continued to play a significant role for the board, and current members review the statements and strategic issues at each board meeting to ensure that they continue to be in alignment. The board is also using the full strategic plan as a tool in its recruitment strategy for new board members.

One of The Galt's intentions written in the strategic plan was to implement a balanced scorecard tool. Such a tool would provide the organization with the opportunity to assess its overall success from a variety of perspectives, though as stated above, the Kaplan and Norton (1992) system does not allow for the distinctive work of a museum to be reviewed.

## **5.7 Summary**

The results of the interviews with senior and front-line staff, board members, the CEO and the consultant and the examination internal documents, indicate that The Galt currently works with a culture that supports a holistic approach to management including an understanding of the importance of its stakeholders. The Galt has demonstrated

awareness of the need to incorporate systems involving all levels and functions within the organization as well as taking into consideration information gathered from key stakeholders. A culture of flexibility is fostered, where inquiry is encouraged and risk is not opposed.

It is evident that the organization set out to assess its level of success when it developed its performance indicators. However it did not ensure that assessment of the strategic plan was conducted in an integrated way, with a focus on outcome evaluation. The next section of this report will describe a series of recommendations on how this integration can be achieved.

## 6. Recommendations

### 6.1 Overview

This report has defined three key issues facing The Galt:

1. The need to connect its strategic issues to its vision and mission for sustainability;
2. The need to ensure that partnerships entered into by The Galt are beneficial to the organization; and
3. The challenge to implement an integrated approach to evaluation that aligns with existing management practice and the current strategic plan.

The Galt has demonstrated that they currently work holistically, with intent and purpose, and have an understanding of the importance of consulting and engaging with key stakeholders. This practice provides the foundation for a strategic management system that supports assessing the organization's success in its entirety, taking internal and external perspectives into consideration.

The recommendations below were developed as a result of the issues identified by The Galt, the concepts presented in the literature review, and the research conducted for this report.

### 6.2 Recommendation 1

The Galt's approach to performance measurement included developing indicators as a component of the strategic plan. Though the organization is currently grappling with how to measure its success and determine if the strategic issues remain connected to the museum's vision, reflect the values of The Galt and are providing a solid foundation for the organization's sustainability.

#### ***Recommendation:***

- ***Ensure that the strategic issues connect with the organization's vision and mission***

To resolve if the existing six strategic issues (Sustainability and Capacity Building, Accessibility, Audiences and Market, Awareness, Infrastructure, and Relationships and Partnerships) are connected to The Galt's vision and mission, the organization must ask a series of questions for each issue.

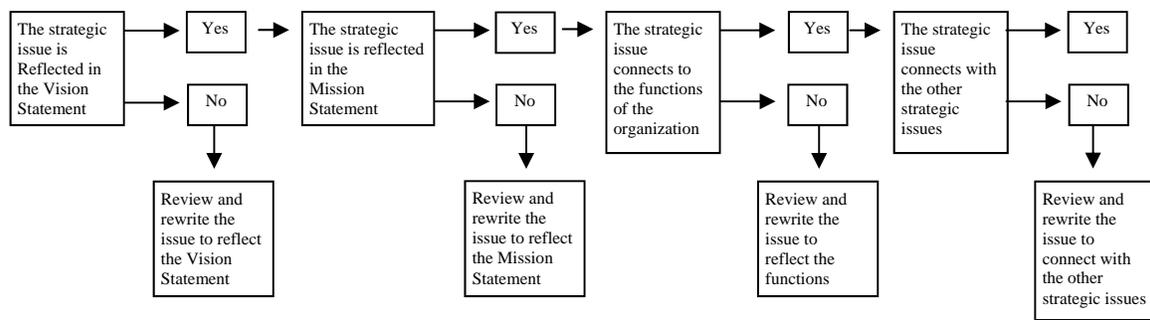
1. How does the strategic issue reflect the vision statement?
2. How does the strategic issue reflect the mission statement?
3. How does the strategic issue connect to the functions of the organization?
4. Does the strategic issue connect with the other strategic issues?

The first question will establish whether the issue connects to the future direction of the organization. In describing how the issue is reflected in the vision statement, the issue is validating its significance to the long-term sustainability of the organization. Next, the organization must ask how the issue is connected to the purpose of the organization and

the audience it serves. This point will confirm the issue’s connection to the business of the organization. Thirdly, The Galt will need to determine if all of the strategic issues connect with each other. Even though each issue addresses specific concerns or ambitions for the organization, a relationship between the strategic issues strengthens its inclusive direction.

Finally, The Galt will need to ask if the strategic issues connect to all the functions of the organization. Whether its exhibition development, a marketing strategy or improving visitor services, understanding that each function is connected and that everyone is working towards a common goal will contribute to a stronger organization.

Figure 2 *Strategic Issue Flowchart*



If the organization confirms that the strategic issues are reflected in the vision statement, the mission statement, connect with each other and connect with the functions of the organization, they are the appropriate issues for The Galt to focus the organization’s work.

### 6.3 *Recommendation 2*

The information currently presented by The Galt to stakeholders and the community on performance does not reflect the strategic plan and its strategic issues. Changing how information is presented to stakeholders will support the connection between the strategic issues and the vision and mission, and will clarify the connection for staff as they adjust to reporting based on the strategic plan.

***Recommendation:***

- ***Ensure that all information presented to stakeholders reflects the strategic plan, vision, mission and strategic issues of the organization***

The Galt has demonstrated a high level of comfort with presenting information as evidenced in the document *Performance Measures 2004 – 2008*, which details the organization’s gains in “Community Pride”, “Financial Stability” and “Visitor

Attendance”. However, these sections do not reflect the organization’s strategic plan and perpetuates the disconnect facing the organization.

Presenting information within the context of the organization’s strategic issues will connect the financial element of The Galt with the organization’s mission and vision. For example, taking the information currently presented in the *Performance Measures 2004 – 2008* document, the strategic issue Sustainability and Capacity Building could include the detail on donations and grants, facility rentals, and museum store gross revenue, Accessibility could include the numbers detailing public programs attendance, Audiences and Market could record the information on visitation, and Awareness could include the statistics on website – first time visitors.

The Galt’s *2008 Annual Report*, and other internal documents, promote the organization’s commitment to “life long learning”, but the information presented is focused solely on the organization’s program offerings to a variety of audiences. It does not promote the learning that has taken place within the organization through professional development and training, mentorship opportunities, coaching or informal ‘knowledge-sharing groups’. The CEO has instituted practices that encourage reflection by all staff, such as providing current articles on museum practice to staff for discussion at staff meetings. Staff are also encouraged to present information to other staff, in both formal and informal settings.

By promoting, through its annual report and other internal documents, a comprehensive record of the development, training and growth opportunities that have taken place during the year, the organization’s commitment to life long learning would be reinforced. This information can be presented in relation to management practices, more efficient and effective ways of operating, or reflected in specific museum functions such as exhibition or program development.

#### **6.4 Recommendation 3**

One of the issues originally brought forward to the researcher was the dilemma concerning stakeholders. The CEO expressed concern that though the strategic issue of Relationships and Partnerships had been identified, and work has been accomplished within the strategies and goals for this issue, it was still unclear as to the purpose or benefit of certain partnerships and relationships. The research for this report found that The Galt did not use a set of criteria to determine if a partnership benefited the organization, nor did it formally evaluate the partnership or relationship other than through observation of the individual staff person involved in the partnership.

##### ***Recommendation:***

- ***Develop a set of criteria to establish mutually beneficial partnerships and relationships***

The first step for The Galt is to develop a written set of criteria that staff and board members can use to determine if a partnership or relationship will be of benefit to The

Galt. A weighted matrix can be used to guide the organization’s decision making process as it enters into new partnerships by determining the level of importance for each criterion and to what extent the partnership satisfies that criterion. The Importance Score and Satisfaction Score are then multiplied, with the total score divided by the total Importance Score. The resulting number, between 0 and 3, will then determine qualify if the partnership should be entered into by The Galt.

In the matrix below, a trial partnership is illustrated with sample criteria and satisfaction scores. In order for The Galt to use this matrix the organization will need to set the statements of criteria, including general criteria for all organizational partnerships, and specific criteria for each proposed partnership. Then The Galt will determine the importance level of each criteria prior to determining the satisfaction level of the proposed partnership.

Figure 3 Partnership Matrix

<b>Partnership with JohnJane Shoe Company</b>		<b>Importance</b>	<b>Satisfaction</b>	<b>Score</b>
1	The partnership connects with the vision of The Galt.	5	3	15
2	The partnership connects with the mission of The Galt.	5	2	10
3	The partnership reflects the values of The Galt.	5	1	5
4	The partnership assists in achieving the outcomes of the strategic plan.	5	3	15
	e.g. a) The partnership provides the opportunity for audience development.	4	2	8
5	The expected outcomes of the partnership are detailed.	5	1	5
6	The contributions required of The Galt are articulated.	5	3	15
7	The contributions required of the partner are articulated.	5	2	10
8	There is organizational capacity at The Galt to manage the partnership successfully.	4	1	4
9	Internal resources can be allocated to support the partnership.	4	3	12
	e.g. a) budget	4	2	8
10	The impact to other functions or staff positions outside of the partnership initiator or liaison are declared.	5	1	5
Total Scores:		<b>56</b>	<b>24</b>	<b>112</b>
Partnership Satisfaction Score:				<b>2</b>

<b>Importance Scale:</b>		<b>Satisfaction Score:</b>	
1	Not important	3	Fully Satisfies
2	Somewhat unimportant	2	Substantially Satisfies
3	Neutral	1	Partly Satisfies
4	Somewhat important	0	Does Not Satisfy
5	Very important		

<b>Overall Partnership Satisfaction Scores</b>		
2.1 - 3	Partnership fully satisfies criteria	Enter into partnership
1.1 - 2	Partnership somewhat satisfies criteria	Partnership may be entered into
0.1 - 1	Partnership partly satisfies criteria	Advisable to not enter into partnership
0	Partnership does not satisfies criteria	Do not enter partnership

In this example, the partnership score is 2, signifying a partnership that somewhat satisfies the criteria as set by the organization. The organization will need to determine if this level of satisfaction is acceptable and worthwhile to pursue the partnership.

The partnership matrix should be reviewed on a regular basis to ensure that the criteria accurately reflect the needs of the organization, and that each partnership continues to satisfy this criteria.

#### **6.5 Recommendation 4**

Currently The Galt does not have a consistent practice to formalize partnerships or relationships. This lack of officially declaring expectations, benefits, requirements or the purpose of the relationship has led to uncertainty around some partnerships and relationships that seem to have little to no benefit for the organization.

##### ***Recommendation:***

- ***Establish a consistent practice of developing written agreement documents between The Galt and all partners to assist in determining if the partnerships have accomplished the intended outcomes***

Once the partnership matrix has shown the potential benefit of a partnership, developing written letters of agreement or a memorandum of understanding for the partnership will provide The Galt with clarity around the purpose and specific benefits of the relationship. The agreement will detail the expectations and requirements of each party in the partnership, and the criteria listed in the partnership matrix can be used as the guideline for what will be included in the written agreement.

The written agreement can then be used as a tool to measure elements of success, as it will describe what each party is required to contribute or accomplish during the partnership. This agreement should be detailed and state specifically what The Galt expects from the partner, and what the organization's responsibilities are. For example, the agreement could include the following statements:

- The partnership between The Galt Museum and Archives (The Galt) and JohnJane Shoe Company will focus on the following outcomes:
  - increasing audience engagement
  - providing greater access to The Galt's collections (specifically shoe manufacturing equipment)
  - increasing local attendance by focusing on relevant local history
- The Galt will contribute the following resources:
  - promotion of the partnership and project on its website
  - staff time (60 hours over 6 months) to complete the project
  - budget allocation of \$5,000 to support materials costs for the exhibition construction

- The JohnJane Shoe Company will contribute:
  - \$5,000 to The Galt for materials costs for the project
  - staff time (30 hours over 6 months) to complete the exhibition
  - provide volunteers as tour guides for the exhibition and to assist with public program delivery
- Both parties commit to assessing the success of the partnership, based on the information listed above, within one year of this agreement.

Itemizing the specifics within the relationship will provide each party with an understanding of the role of each partner within the relationship. As well, it identifies what the partnership will be evaluated on, and whether or not it was successful for either partner. The partnership agreement will define the timeframe for evaluation, for example on an annual basis the partners will meet to review the expectations and recommendations detailed in the agreement.

### **6.6 Recommendation 5**

Within The Galt's strategic plan, a series of performance indicators have been developed for each strategy and goal listed under the six strategic issues. Interviewees indicated that performance indicators were not integrated into the work of the organization, and disclosed that some performance indicators were not being monitored at all. Moreover, most of indicators detailed in the strategic plan are output based and focus on the organization gathering statistical information. Incorporating outcome based evaluation techniques into the existing performance measurement system will provide a direct connection to the impact of The Galt's work in the community and will in-turn link the external environment, internal operations, and long-term strategy.

#### ***Recommendation:***

- ***Establish an outcome based approach to determine organizational success***

Outcome based evaluation assesses whether the museum is meeting its mission by evaluating the impact the organization has on the community. Each of the performance indicators outlined in the strategic plan need to be examined to determine if they are the appropriate measures for The Galt, either outcome based or output based, providing a more inclusive approach to evaluating the organization's impact as a whole. Each function area of the museum must take responsibility for determining what strategies should be measured and establishing outcomes for those strategies, though the criteria for the development process should be the same across the organization.

The following section shows proposed outcome statements and indicators examples for each strategic issue as adjustments to the existing strategy/goal/ performance indicator system to reflect an outcome based approach to evaluating The Galt's success for each strategic issue.

### Sustainability and Capacity Building

Current Goal	Current Performance Indicator	Proposed Outcome Statement	Proposed Indicator
Complete Fund Development Plan by 2007 Oct/Nov	<ul style="list-style-type: none"> <li>• Completion of fund development plan</li> </ul>	The Galt realizes financial stability through diverse revenue generation	<ul style="list-style-type: none"> <li>• Completion of a fund development plan</li> </ul>

The outcome proposed for the strategic issue Sustainability and Capacity Building indicates the significance of overall financial stability for the organization, and not just the task of developing a fund development plan, which is an activity and not an outcome.

### Accessibility

Current Goal	Current Performance Indicator	Proposed Outcome Statement	Proposed Indicator
The majority of Galt's target audiences perceive greater access to collections via programs and exhibits as measured in annual visitor surveys	<ul style="list-style-type: none"> <li>• Accessibility responses in annual visitor surveys</li> <li>• Paid attendance</li> </ul>	Visitors to The Galt's permanent exhibition demonstrate increased level of knowledge of southwestern Alberta history	<ul style="list-style-type: none"> <li>• Post-visit exhibit survey responses indicate knowledge of the three primary messages from the exhibition</li> </ul>

The strategic issue Accessibility, the proposed outcome refers specifically to the increase in knowledge of visitors to The Galt's permanent exhibition. Outcomes communicate changes to skill, knowledge, attitude, behaviours or values, and this proposed outcome and indicator assess a visitor's knowledge of local history, which connects directly to the organization's mission statement.

### Audience and Market

Current Goal	Current Performance Indicator	Proposed Outcome Statement	Proposed Indicator
Member utilization of the Galt's offerings is consistent with its mandate, mission and vision	<ul style="list-style-type: none"> <li>• Total visitation by members</li> </ul>	Museum members are connected and engaged with the organization	<ul style="list-style-type: none"> <li>• Number of members that are volunteers</li> <li>• Number of donations received by the museum that are from members</li> <li>• Level of satisfaction of members as determined by an annual member survey</li> <li>• Total annual visitation of members to the museum</li> </ul>

In Audiences and Market, the original goal referred to increasing the museum’s membership use of the programs and services offered by The Galt. Though, this does not assess the behaviour of the membership. Proposing the outcome “Museum members are connected and engaged with the organization” evaluates the level at which museum members are involved with the organization and take advantage of what The Galt has to offer, expressing their behaviour in relation to the museum.

**Awareness**

Current Goal	Current Performance Indicator	Proposed Outcome Statement	Proposed Indicator
Awareness and use of the Galt and its offerings specifically by audiences within the Galt’s local market increases	<ul style="list-style-type: none"> <li>● Total visitation by local audience groups</li> </ul>	Lethbridge and area residents have access to programs, exhibitions, and archival services.	<ul style="list-style-type: none"> <li>● Number of Lethbridge and area residents that participate in public programs annually</li> <li>● Number of Lethbridge and area residents that visit permanent exhibition annually</li> <li>● Number of Lethbridge and area residents that visit temporary exhibitions annually</li> <li>● Number of Lethbridge and area residents that access archival services annually</li> </ul>

The proposed outcome statement for the strategic issue Awareness, that local residents have access to the organization’s programs, exhibitions and services, conveys the value The Galt has placed on the importance of being open and accessible to all communities, which is reflected in the organization’s values statement. In this specific instance, the outcome is targeting local residents, and other outcomes can be developed to address the needs of additional audiences.

**Infrastructure**

Current Goal	Current Performance Indicator	Proposed Outcome Statement	Proposed Indicator
The acoustics in the Viewing Gallery are improved.	<ul style="list-style-type: none"> <li>● Visitor satisfaction responses</li> <li>● Acoustical measurements before / after implementation of improvements</li> </ul>	Visitors in the Viewing Gallery enjoy an echo-free experience.	<ul style="list-style-type: none"> <li>● Visitor satisfaction survey results</li> <li>● Acoustical measurements before / after implementation of improvements</li> </ul>

The original goal stated for Infrastructure referred to the task of fixing the acoustics. The outcome proposed for the strategic issue of Infrastructure now refers to the intended attitude of visitors in the space, that they will have an enjoyable experience. This outcome also assists in fulfilling the organization’s vision of being a “vibrant gathering place”.

**Relationships and Partnerships**

Current Goal	Current Performance Indicator	Proposed Outcome Statement	Proposed Indicator
The Galt is seen as a valuable partner with local and regional institutions and stakeholders	<ul style="list-style-type: none"> <li>• Number of Memoranda of Understanding completed</li> </ul>	The Galt is seen as a valuable partner with local and regional institutions and stakeholders	<ul style="list-style-type: none"> <li>• Expectations of The Galt as defined in the written Partnership Agreement are met</li> <li>• Level of satisfaction of partners in an annual partner survey</li> </ul>

One of the goals stated for strategic issue Relationships and Partnerships is actually an outcome statement, however, the indicator in this case was adjusted to gather information that reflects the partner’s opinion of whether or not The Galt is a valuable partner. The number of memoranda of understanding will not provide The Galt with information to determine if they are valuable in the community, and the Galt can not ask itself if it is valuable to other organizations, this has to be determined by the partner organization.

**6.7 Summary**

The recommendations listed in this report provide The Galt with a means to connect the strategic issues, partnerships and evaluation strategies to the vision and mission of the organization.

Recommendation 1, *Ensure that the strategic issues connect with the organization’s vision and mission*, provides a process to assess whether the organization’s strategic issues connect with the organization’s vision and mission, addressing one of the primary issues expressed by The Galt at the beginning of this research

Recommendation 2, *Ensure that all information presented to stakeholders reflects the strategic plan, vision, mission and strategic issues of the organization*, deliberately connects the work of the organization to its strategic plan, and encourages staff and board members to view their work from the perspective of how it is accomplishing the organizations vision, mission and strategic issues.

Recommendation 3, *Establish a set of criteria to establish mutually beneficial partnerships and relationships*, presents a framework that the organization can adapt to ensure that prospective partners meet the needs of The Galt, will support the organization in establishing beneficial relationships with external organizations

Recommendation 4, *Establish a consistent practice of developing written agreement documents between The Galt and all partners to assist in determining if the partnerships have accomplished the intended outcomes*, connects to the third recommendation in that it details the need to clarify the expectations and requirements from the perspective of both The Galt and the partner organization. Explicitly stating the roles and responsibilities in a written document will assist in determining if the partnership fulfilled its intentions

Recommendation 5, *Establish an outcome based approach to determine organizational success*, provides The Galt with a more balanced system of performance measurement that builds on the existing evaluation indicators already established in the strategic plan.

Each of these recommendations connects The Galt with its strategic plan as it heads into the second half of the plan's timeframe. They also address the three issues originally defined by the organization, namely connecting strategic issues to the vision and mission for sustainability, ensuring that partnerships entered into by The Galt are beneficial to the organization; and implementing an integrated approach to evaluation that aligns with existing management practice and the current strategic plan.

Clarity on how to determine beneficial partnerships, connect the work of the organization to its strategic issues, vision and mission, and develop a more balanced approach to evaluation, will support the organization as it continues on its journey to sustainability.

## 7. Conclusion

This report was conducted as an interim review of *The Galt Museum & Archives Strategic Plan 2007 – 2014*, as The Galt searched for ways to assess whether their current strategic issues were connected to the museum's vision and mission, to clarify the purpose of partnerships and to integrate an evaluation system that took the strategic plan into consideration. Research explored strategic planning processes for museums, the importance of consulting with stakeholders and utilizing the feedback received, and incorporating an integrated approach to evaluation.

The literature review concluded that museums that encourage an organizational culture of strategic thinking, work with purpose and intent, build on existing successful management practices and assess its performance using an outcome based evaluation approach as well as with outputs to determine how it is making a difference in its community, will achieve sustainability. An examination of internal documents and interviews with staff, board members and focus groups with community organizations research demonstrated that The Galt's current operations reflect the characteristics of a strategic thinking organization. As well, it revealed that the CEO had implemented several practices to assess the performance of the strategic plan, evidence that there was an understanding of the importance of ongoing evaluation. The strategic plan also included performance indicators but research showed that these were not a part of the ongoing work of the organization.

The five recommendations listed within this report suggest ways in which The Galt can incorporate changes to their existing strategic management practices to achieve long-term sustainability.

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## Appendix 1

### Interview Schedule:

<b>Date:</b>	<b>Interview:</b>	<b>Time:</b>	<b>Location:</b>
September 22, 2009	Staff Member	10:00 am	Lethbridge, AB
September 22, 2009	Staff Member	11:20 am	Lethbridge, AB
September 22, 2009	Staff Member	1:30 pm	Lethbridge, AB
September 22, 2009	Board Member	2:45 pm	Lethbridge, AB
September 23, 2009	Consultant	1:00 pm	Calgary, AB
September 23, 2009	Board Member	9:00 am	Phone call, Calgary, AB
October 5, 2009	Staff Member	9:30 am	Lethbridge, AB
October 5, 2009	CEO	1:00 pm	Lethbridge, AB

### Focus Group Schedule:

September 22, 2009	4:30 pm	Lethbridge, AB
October 5, 2009	10:30 am	Lethbridge, AB

## Appendix 1 continued:

### The Galt Museum and Archives Consultant Interview Questions

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#### PREAMBLE / INTRODUCTION

1. Describe the planning process you used in the development of the Galt Museum's Strategic Plan.
  - a. How did you ensure that it was a holistic approach?
  - b. How did you determine the purpose of the organization?
    - i. How did you ensure that the purpose was 'front and centre' of all discussions?
  - c. How did it connect with the past and present as well as the future of the organization?
  - d. How did you test the ideas that formed the Strategic Issues?
  - e. How did you recognize new opportunities?
    - i. How did you take advantage of these opportunities through the planning process?
2. To what extent did you involve:
  - a. Staff
  - b. Volunteers
  - c. All areas of the organization (i.e. all departments / functions)
  - d. All levels of the organization (i.e. senior staff, full time, part time, volunteer, Board)
3. Describe the stakeholder engagement you conducted.
4. How were the museum's daily operations integrated into the Strategic Plan?
5. How were financial resources incorporated into the planning document?
6. Were the organization's values used as a foundational document for the planning framework?
7. Do you believe that the organization's values are reflected in the development of the Plan?
  - a. Provide examples.
8. How was an evaluation strategy developed during the planning and development of the Plan?
9. Any final comments

# The Galt Museum and Archives CEO Interview Questions

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## PREAMBLE / INTRODUCTION

1. When did you start your position with the Galt?
2. Where in the process was the Plan?
3. When you started with the Galt, how were you oriented to the Strategic Plan?
4. How do you ensure that the Strategic Issues and Actions:
  - a. Connect with the Vision
  - b. Reflect the Values of the organization?
5. How are the Strategic Plan's Performance Indicators integrated into the work of the various departments?
6. Strategic Thinking is defined as:
  - i. Holistic
  - ii. Focus on intent (of organization)
  - iii. Reflecting the past, present and future
  - iv. Hypothesis driven (testing of ideas)
  - v. Recognition and taking advantage of new and emerging possibilities
  - a. To what extent are these characteristics encouraged in the organization?
7. How do you ensure that the various internal departments and functions of the Galt are connected?
8. How do you ensure that the work of the Galt is connected to the external environment?
9. How do you integrate the Strategies Issues across the functions of the organization?
10. Describe how the Strategic Plan and Business Plan documents are used within the organization.
11. How is the Strategic Plan reflected in the budget?
12. What criteria are used when pursuing Partnerships?
  - a. How do you identify beneficial Partnerships?
13. Is there a process for determining the success of a Partnership?
14. How does the Galt communicate with the community?
15. Any final comments?

# The Galt Museum and Archives

## Staff Interview Questions

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### PREAMBLE / INTRODUCTION

1. POSITION
2. Describe your role at the Galt Museum and Archives.
3. Were you on staff during the development of the Strategic Plan?
4. How did you find out about the goals of the Strategic Plan?
5. Tell me one or two Strategic Issues from the Plan that relate to your daily work.
6. How does the overall Strategic Plan relate your current work?
7. How have you changed your daily work to ensure that the Plan's initiatives are integrated into your responsibilities?
8. How have you integrated the Strategic Plan's Performance Indicators into your work?
9. To what extent is your work connected to other departments within the organization?
10. To what extent is your work connected to external organizations and communities?
11. How are partnerships identified?
12. How are stakeholders and the community involved in the execution of the Plan's initiatives?
13. How do staff communicate with stakeholders and partners?
14. How do staff track the success of partnerships?
15. To what extent are you involved in managing your areas budget?
16. How is the Strategic Plan reflected in the budget?
17. To what extent do you think the Strategic Plan will impact your future work?
18. How would you improve the implementation of the Plan?
19. Any final comments, questions.

# The Galt Museum and Archives

## Board Interview Questions

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### PREAMBLE / INTRODUCTION

1. Describe the role and responsibility of the Galt's Board of Directors.
2. Describe the planning process you used in the development of the Galt Museum's Strategic Plan.
3. How did you ensure that it was a holistic approach?
4. How did you determine the purpose of the organization?
5. How did it connect with the past and present as well as the future of the organization?
6. How did you test the ideas that formed the Strategic Issues?
7. How did you recognize new opportunities?
8. How did you take advantage of these opportunities through the planning process?
9. To what extent did you involve:
  - a. Staff
  - b. Volunteers
  - c. All areas of the organization (i.e. all departments / functions)
  - d. All levels of the organization (i.e. senior staff, full time, part time, volunteer, Board)
10. Describe the stakeholder engagement you conducted.
11. How were the museum's daily operations integrated into the Strategic Plan?
12. How were financial resources incorporated into the planning document?
13. Were the organization's values used as a foundational document for the planning framework?
14. Do you believe that the organization's values are reflected in the development of the Plan?
  - a. Provide examples.
15. How was an evaluation strategy developed during the planning and development of the Plan?
16. Any final comments?

# The Galt Museum and Archives

## Focus Group Questions

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### PREAMBLE AND INTRODUCTION

1. Were you involved in the initial consultation during the development of the Galt Museum's Strategic Plan? If yes, please raise your hand. (*number of hands as indicator*)
  
2. Here is a copy of the Galt's Vision, Mission and Values.
  - a. To what extent do you see these statements reflected in the work of the Galt?
  - b. Provide examples
  
3. As community members, how have you seen the Galt Museum connect with the community?
  - a. Provide examples
  - b. How does the Galt communicate with the community?
  - c. What type of relationships does the Galt have with the community?
  
4. What would be a good way for the Galt to ask you for feedback for:
  - a. Exhibition
  - b. Museum's general services i.e. Gift Shop
  - c. General visit to the Museum
  - d. Public program

## Appendix 2

# Galt Museum & Archives

### **Vision Statement:**

The Galt Museum & Archives is a vibrant gathering place that meets historical, cultural and educational needs.

### **Mission Statement:**

The Galt Museum & Archives engages and educates our communities in the human history of southwestern Alberta by preserving and sharing collections, stories and memories that define our collective identity and guide our future.

### **Values:**

#### Stewardship:

- We treasure and protect the stories, objects, memories and relationships of our communities
- We advocate for history, culture and historical education

#### Creativity and Innovation:

- We thrive on challenge, ingenuity and improvement
- We believe in and foster life long learning

#### Integrity and Authenticity:

- We are open, honest and respectful
- We ensure the authenticity of our collections, exhibits, education and programs

#### Teamwork and Co-operation:

- We encourage diversity of opinion
- We find merit in collaboration and partnerships

#### Excellence:

- We believe that with dedication, passion and commitment we strive for our best performance
- We respect the skills and expertise of others and cherish diversity

# Galt Museum & Archives

## Strategic Issues:

- Sustainability and Capacity Building
- Accessibility
- Audiences and Market
- Awareness
- Infrastructure
- Relationships and Partnerships

## Appendix 3

### Bryson's Strategy Change Cycle

#### A Ten – Step Strategic Planning Process

1. Initiate and agree on a strategic planning process.
2. Identify organizational mandates.
3. Clarify organizational mission and values.
4. Assess the external and internal environments to identify strengths, weaknesses, opportunities and threats.
5. Identify the strategic issues facing the organization.
6. Formulate strategies to manage the issues.
7. Review and adopt the strategies or strategic plan.
8. Establish an effective organizational vision.
9. Develop an effective implementation process
10. Reassess the strategies and the strategic planning process.

Taken from:

Bryson, J. (2004a). *Strategic Planning for Public and Nonprofit Organizations*. 3<sup>rd</sup> edition. San Francisco, USA: John Wiley and Sons, Inc. page 33.