



# Strategic Plan 2019-2021

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A previous strategic plan for the Cranbrook Archives, Museum and Landmark Foundation (CAMAL), o/n the Cranbrook History Centre (CHC), was developed with the assistance of Mission and Strategic Solutions, Inc. in 2014. Since that time, the CAMAL has worked hard to achieve financial sustainability, increase community engagement and manage the collections and tangible assets. The organization has come a long way since 2014 and has achieved many of its critical goals.

In 2018, a Fundraising Consultant was hired with funding from the Columbia Basin Trust to facilitate a fundraising plan for the Heritage Railcar Preservation Building. The report by Abundance Fundraising prompted major changes within the organization. Subsequently, 2019 was a year of important developments. After the departure of the Executive Director, the CAMAL Board of Directors chose to replace the role with a Chief Curator and Business Manager. Their role as a Management Team split the responsibilities and tasks of running the Cranbrook History Centre with the goal of creating stronger professional standards and financial systems. With the new Management Team in place and Phase 1 of the Heritage Railcar Preservation Project complete, CAMAL next engaged in a process to update its strategic plan. The plan creates a framework for how the Centre will move forward after the major organizational changes and provides guidance for the next two years. The following document summarizes the process and outlines the strategic plan for the organization for 2019-2021.

## Process

The CAMAL Board of Directors engaged the services of a professional advisor who had worked with the CHC previously to develop a strategic plan articulating the goals and objectives for a two-year period. Abundance Fundraising facilitated 3-days of workshops, stakeholder meetings, and a session on Non-profit Lifecycle Staging. The Non-profit Lifecycle Staging established a starting point for the planning process. The Board and Management Team worked together to sets realistic expectations, recognize when behaviours are out of sync, and depersonalized the issues in order to get everyone on the same page in terms of where the organization is and where we want to be by the end of 2021.

The Board and museum Manager then engaged in a strategy planning session to consider the strategic goals, assign responsibilities for achieving these goals, timelines and future plans for the renewal of the organization over the next two years. The following information summarizes the work by the Directors and Staff and forms the strategic plan for 2019-2021.



## Mandate

The Cranbrook History Centre is an archives dedicated to study and research, and a museum that provides engaging and informative exhibitions and programs focused on the histories, peoples, and stories of Cranbrook and the East Kootenay region.

## Mission

Cranbrook History Centre: We believe in the power of history to ignite the imagination, stimulate thought and provide enjoyment. Through our collections and programs we strive to integrate history into the lives of the broadest possible audience, all in accordance with the highest professional standards.

## Vision

The Cranbrook History Centre will become a premier destination to showcase natural and human history of the Cranbrook and East Kootenay area.

It will be a facility for the public to share and preserve heritage for present and future generations, and to excite, inspire, and generate educational programs, innovative technologies and leading edge research.

## Goals for 2019 – 2021

To move the organization out of Decline, through Turnaround and back to Start-up with alignment of all aspects to set the stage for Growth.

1. Create new, dynamic and innovative programming.
2. To improve board structure, function and trust.
3. Improve financial reporting and planning in order to position the organization for fundraising.
4. Ensure the data necessary to making good decisions is accurate and accessible.
5. To tell our story of change and renewal in a way that inspires community confidence.



## Goal 1 - Create new, dynamic and innovative programming.

### Objectives:

- 1.1 Engage the community in our mandate, mission and vision.
- 1.2 Animate our collections and exhibits.
- 1.3 Explore and involve diverse communities.

### Outcomes and Performance Indicators:

- Have people other than staff and board attend and serve as leaders in workshops, lectures, and events designed to enhance understanding of Cranbrook history.
- Provide engaging educational programs every month of the year both on and off site.
- Design programs that invite new people to participate.

## Goal 2 - To improve board structure, function and trust.

### Objectives:

- 2.1 Update CAMAL bylaws.
- 2.2 Review Mandate, Mission & Vision.
- 2.3 Review Policies.
- 2.4 Review governance manual annually and provide governance orientation during first board meeting after AGM.
- 2.5 Succession Planning.
- 2.6 Membership procedures and definitions to facilitate renewal.

### Outcomes and Performance Indicators:

- Bring bylaws into compliance with BC Societies Act.
- Renew commitment and understanding of the organization's purpose and potential.
- Updated and amalgamated employee policy manual to guide conversations and ensure standards.
- Educate board members with clear expectations for new members for onboarding.
- Clear path for board leadership for the next three years with job descriptions and important task lists for key positions in place.
- Increased number of members. Engaged and educated membership. Re-engaged lapsed members.



Goal 3 - Improve financial reporting and planning in order to position the organization for fundraising.

Objectives:

- 3.1 Improve financial reporting and planning.
- 3.2 Approve annual budget by October 31 each year.
- 3.3 Improve relationship with funders and donors.

Outcomes and Performance Indicators:

- Everyone has a clear understanding of how much it takes to run the organization and where the money comes from. Staff and board all tell the same story and take responsibility for their part in the financial stability of the organization.
- Clear expectations around financial challenges. Confidence in the future.
- Increased funding year to year.

Goal 4 - Ensure the data necessary to making good decisions is accurate and accessible.

Objectives:

- 4.1 Facilitate the accurate retrievable recording of all items in the collection through the new PastPerfect collections database.
- 4.2 Accurate management of visitor, donor, volunteer, funder, and prospect records through Bloomerang.

Outcomes and Performance Indicators:

- Good data planning around what to showcase and what to deaccession through a complete collections inventory.
- Enhancing public accessibility to items online.
- Ability to record all relationships within our organization, communicate with groups of stakeholders in an effective and timely manner, retrieve information exactly when needed, facilitate transactions and report results.



Goal 5 - To tell our story of change and renewal in a way that inspires community confidence.

Objectives:

- 5.1 Create funder and donor trust by rebranding
- 5.2 Signal fresh start to stakeholders
- 5.3 Remove all materials referencing anything other than the selected brand

Outcomes and Performance Indicators:

- Form a rebranding committee to investigate rebranding opportunities. Engage past and present members in the process. Have a clear direction for rebranding process.
- New website hooked up to Bloomerang that tells our story simply and clearly with a user-friendly look.
- Remove all material that references anything but the single name and purpose. Create working list on SharePoint where everyone can add sites and documents which need to be updated.

Thank you to Abundance Fundraising for guiding this strategic planning process.

