

Los Altos History Museum Report
Organizational Analysis Project Part 1

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Part 1 – Description of the Los Altos History Museum

Description of the LAHM

The Los Altos History Museum (LAHM) is the local history museum of the Los Altos area. Opened in 2001, it is located in a former apricot orchard in Santa Clara county (Los Altos History Museum, 2019). The museum complex is comprised of a three-story building, a garden, and a refurbished historic farmhouse. The largest building houses both permanent exhibits and several spaces for rotating exhibits and gallery displays. The farmhouse, originally built in 1905, has been refurbished to replicate a 1930s farmhouse and is used as a museum of everyday objects of the past (Los Altos History Museum, 2019). The museum buildings are only open Thursday through Sunday, from noon to 4pm, but the public is encouraged to enjoy the gardens even when the museum itself is closed.

The museum is run by a small and dedicated staff with the help of numerous volunteers. Admission to the museum is free and in order to keep it free, they host several fundraising events throughout the year, offer paid memberships, rent out their properties for private events, apply for grant money, run an on-site store and solicit donations from the public. The museum features three permanent exhibits as well as temporary exhibits that rotate and are replaced about every 6 months in order to provide new and exciting material. The museum is community oriented and its collections are primarily comprised of materials related to Los Altos and the surrounding area. They even have some artifacts on exhibit from the Ohlone people, who inhabited the area before Europeans arrived.

The LAHM is located in an affluent area and their fund-raising efforts have been quite successful, even before the opening of the museum. However, they did not engage in long term strategic analysis and planning until the 2017 fiscal year (Ward, 2019). The museum hopes to

continue to improve the implementation of its mission and to make its strategic planning even more focused on and tailored to the needs of the communities it serves.

Part 2 – Environmental Scan and SWOT Analysis

Background on Los Altos and Region

The population of Los Altos, CA was recently estimated to be at 30,531; of this 64.6% is white, 0.3% is black or African American, 0.2% is Native American and Alaska Native, 28.2% is Asian. According to the census 83.0% of people living in Los Altos, CA own their own homes, 97.4% of people have a computer within their homes, 98.6% of people are high school graduates, and 82.3% of people have a bachelor's degree or higher. The median household income in 2017 was \$208,426. Only 3.2% of people live in poverty. Based on these facts, Los Altos, CA can be considered a more affluent community (U.S. Census Bureau, 2018).

The history of the area is rich and diverse. The land the city currently occupies was once home to indigenous peoples, settlers from Mexico, and more recently immigrants from Asia, farmers and agricultural workers, and middle-class families (Los Altos History Museum, 2019). The LAHM aims to highlight the range of diverse cultures, social change and stories that make up the local history (Los Altos History Museum, 2019).

Los Altos History Museum's Local Partnerships

The Los Altos History museum is deeply embedded in its local communities on a variety of levels. It works extensively with the city of Los Altos, the Los Altos Historical Commission and the Los Altos Library among a host of other local non-profits, businesses and academic institutions. In recent years one of the museum's primary goals has been to increase their outreach to a variety of communities - including local Latino and Asian American populaces, among others - with programming and events that explore the contributions made by those

communities and their notable historical figures to the fabric of the region. LAHM has utilized its archives for unique projects such as collaborating with resident artists at the SFMOMA, as well as for more conventional projects like dating community plaques. LAHM's success in forging local and regional partnerships should be encouraging to its internal and external stakeholders.

City Commission- Historical Commission

One of the Los Altos History Museum's main partners is the Los Altos Historical Commission. According to the Los Altos Historical Commission's website, the organizations are currently collaborating on several projects including a school essay contest (City of Los Altos, 2019). Additionally, members of the Los Altos Historical Commission have served on the board of directors of LAHM (Historical Commission, n.d.; Los Altos History Museum, 2019). Both organizations focus on preserving and sharing regional history and strengthen each other in fulfilling their respective missions.

Background on Volunteer programs

The Los Altos History Museum relies heavily on its team of volunteers to keep the museum functioning on a daily basis. The museum encourages local residents to use their existing talents or to learn new skills while volunteering at the museum through a variety of volunteer opportunities (Los Altos History Museum, 2017). Volunteers perform tasks in an array of categories including collections, facilities/gardens, docents, events, exhibits, fundraising, marketing/PR, membership, and more, with docents and museum store cashiers making up most of the volunteer base (Los Altos History Museum, 2017, 2019). During 2017-18, a total of 336 volunteers completed 9,596 hours of volunteering (Los Altos History Museum, 2018).

About volunteers at the museum, the Executive Director of the LAHM, Dr. Elisabeth Ward, states: “One of the things I’m most proud of is that the Los Altos History Museum is very much of a volunteer organization. We have community support through our members - we have a membership program and we’re always excited to have new people become members” (KMVT, 2019).

Community involvement is profoundly important to the LAHM for many reasons, not least of which is that it helps the museum make its programs available to the public while operating within tight budget constraints. While the volunteer program is extensive it still is not enough to fully staff the museum for daytime opening hours.

Volunteer Partnerships

LAHM will need to use more volunteer hours in order to expand hours and provide more robust programs. The museum has partnered with two educational institutions, Los Altos High School and Foothill Community College to encourage younger people to become involved in the museum programs (Ward, 2019).

Los Altos High School Profile

The museum has launched a High School Docent Program. LAHM describes, “Teen docents will lead tours, interact with visitors, and assist with museum activities and programs” (“Teen Docent Program”, 2019). These volunteer positions are geared towards connecting students with their community, giving them volunteer experience, and allows them to job shadow those at the museum (“Teen Docent Program”, 2019).

The Los Altos High School is an affluent college preparatory school. The School Profile states, “Newsweek ranked LAHS among the top 1% of high schools nationwide. Enrollment of 2,232 students includes 40% Caucasian, 26% Hispanic-Latino, 30% Asian and 4% other” (Los

Altos High School, 2019). Because the school is one of the top schools in America, these students can be considered more advanced in responsibilities and studies and the school profile proves this in statistics having to do with SAT Test Scores and participation in Advanced Placement programs, making them strong candidates for teen docents at the museum (Los Altos High School, 2019).

Additionally, parental involvement is also very important at Los Altos High School. Los Altos's School Accountability Report Card (SARC), gives a brief summary of four parent groups who help fulfill different needs of students. These groups include: the Los Altos Parent Teacher Student Association (PTSA), the Los Altos High School Athletic Boosters Club, the Instrumental Music Boosters Club, and LUCHA (Los Altos High School, 2018).

The academic progress and parental involvement at Los Altos High School can be considered factors in developing the teen docent position at LAHM.

The LAHM Donor and Support System

The LAHM is a non-profit organization and as such they need the support of donors and the community at large to fund the museum and its upkeep. Each year they release an annual report on what has happened during the year and where their money has come from. Depending on the year, about 40-50% of their income comes from the museum store and people renting out the property for private events, like weddings. They also host community fundraising events, like their annual crab feed, and these events account for about 10-20% of their income. The LAHM does receive grants from the City of Los Altos as well as support from corporate sponsors. The corporate sponsors vary from year to year, ranging from local businesses, like Los Altos Hardware, to bigger businesses, like 23 and me and Starbucks. One consistent supporter is the Los Altos Community Foundation, which is dedicated to building the community of Los Altos. Individual donations

range from about 10-25% of income. A significant amount of the museum's support comes from community members in a variety of ways, this is even more evident when volunteers are considered (Los Altos History Museum, 2015, 2016, 2017, 2018).

The Spectrum of LAHM Programs

The LAHM has a well-established track record of collaborating with a diverse set of local organizations, sponsors and individuals who bring their unique perspectives and expertise to LAHM's programming. The museum's archive of press releases demonstrates their ability to forge lasting relationships and *ad hoc* alliances to stage events and exhibits that expand their relevance and reach to varied local communities and visitors. Some of these partnerships are unsurprising: The City of Los Altos Historical Commission and the Los Altos Library for example, which frequently hosts LAHM events. Others appear to be more in the nature of one-off collaborations: NASA's Ames Research Center and the Institute for the Future, among others. A common denominator among these collaborations is the intention articulated in the museum's Vision Statement: to promote "intergenerational and intercultural connections" (Los Altos History Museum, 2019).

There are several ways the museum promotes intergenerational connections, one being the tours they give the third and fourth grade students of Los Altos school district. This is an annual event that consistently receives positive feedback and connects youth with the city's past. In more recent years, exhibits have been updated to be more interactive for the children. Another annual event they host is a historical essay contest for third through sixth graders with a different prompt each year. This again gets the next generation involved in history and with the museum. In order to connect with those who have lived through history, the museum has an Oral History Program,

where they interview people and collect their stories, which can then be found in the museum's collection.

Another asset that LAHM has is programming that positions itself to, in the museum's words, "shape a more informed future" (Los Altos History Museum, 2019). They've embraced social justice themes (Symposium on Influential Women of Color), emergent technologies (the Apricot STEM Fair), and environmental protection (Shaped by Water) (Los Altos History Museum, 2019). They also frequently convene panels with local business luminaries and academics from regional colleges and universities, which expands their nexus of local connections in other ways. All of these factors increase the odds of LAHM remaining meaningful to the different communities it serves over the long term.

List of the Permanent Exhibits and evaluate how they fit in with Mission and Vision:

The permanent exhibits are a window to the past. Ward states, "There are many generations of people who have stories related to this place. They remember picking fruit at a certain orchard, and now that orchard is a high school... There are people alive today that really remember a different landscape [of the town]" (KMVT, 2019). The exhibits show what the town was like and the daily lives of those who lived there. The rotating exhibits tend to connect the past to the present, considering how things have changed and pondering what could come in the future.

List of Permanent Exhibits at the LAHM and how they fit with Mission and Values

There are three permanent exhibits at the LAHM. Two exhibits are the original farmhouse and the farmhouse grounds, preserved as re-creations of everyday objects *in situ*. The exhibits' purpose is to illuminate past life and work in the region (Los Altos History Museum, 2019). The third permanent exhibit is housed in the larger museum central building and is meant to balance the singular focus of the original farmhouse and grounds exhibits (Los Altos History Museum,

2019). Whereas the original farmhouse and grounds gives the visitor a deep dive into the life of one single family, the Crown of the Peninsula exhibit seeks to provide a wide and intensive overview of the incredible diversity of cultural in the region (Los Altos History Museum, 2019). The three permanent exhibits adhere very closely to the current mission statement.

Past Rotating Exhibits and evaluate how they fit in with Mission and Vision:

A cursory and subjective review of the past 27 exhibits at the museum was made to evaluate the relative success or failure of the exhibits to represent the current values and mission statements. Of the 27 past exhibits over half had a main subject of local history (Los Altos History Museum, 2019). Also, at least 11 of the exhibits focused on a subject highlighting the diversity of local culture (either cultural, ethnic, gender, or socio-economic status) (Los Altos History Museum, 2019). Only a few subjects were mainly about current events that did not seem tied to historical topics or intercultural experiences. Most of these outliers were focused on presenting local contemporary art works by medium (painting, sculpture, etc). This emphasis on diversity is reflected in its choice of exhibit and event subjects and the 27 past exhibits reviewed by our group showed that there was at least one exhibit centering and highlighting each category listed immediately above (Los Altos History Museum, 2019). This reflects a close adherence to the Values, Mission Statement and Vision statement of the LAHM.

SWOT Analysis

Based on the research as laid out above, we reorganized the salient findings into a SWOT analysis. We focused our evaluative work on the most vital issues we felt could be addressed through our direct recommendations for program improvements or through restructuring of the vision, mission, and values statements.

List of Strengths

- Enable intergenerational and intercultural conversations between participants through exhibits and events, as per their Vision Statement
- Connection to the community by focusing on local culture and history
- Focus on making exhibits and events inviting and exciting for youth
- Versatile space includes gardens, historic home and main museum; facility rentals
- Growing collection of archives including unique oral history program

List of Weaknesses

- Limited access to the exhibits due to short hours of operation
- Limited number of volunteers
- Some exhibits could be improved with more interactivity
- Reliance on donor gifts and grants for funding
- Not enough income from the Museum Store
- Has only relatively recently begun strategic planning
- Lack of social media presence

List of Opportunities

- Increase volunteer base including by promoting internships for local college students
- Increase and diversify use of technology in programs and exhibits
- Upgrade some exhibits with virtual reality enhancements and other interactive experiences
- Create a mobile app to provide on the spot references and information about local historical sites, creating an out-of-museum portable exhibit
- Increase use and integration of social media activity
- Expand access to digital archives / collections for researchers and visitors

List of Threats

- Cultural shift to 2 income households creates a decrease in in-person museum attendance
- The museum relies on a donor base tied to the volatile Silicon Valley tech economy. This may point at a need to diversify funding sources
- Costly environmental and structural damage to the buildings and lighting in the garden

Part 3 – Literature Review of a Management Issue

The scholarly literature on strategic planning is vast, and in the world of business management, dates back to the 1950s (Mintzberg, 1994, p. 6). Myriad models and tools for facilitating strategic plans have been developed which span a wide range of methods, from “insight matrices” (Duggan, 2013, pp. 12-13) to “visual strategizing” (Eppler and Platts, 2009, p. 42) to the byzantine Ansoff Model of Strategic Planning (Ansoff, 1965, pp. 202-203), to pick just three. A review of this literature is by necessity unsystematic and piecemeal. In our choice of sources, we have favored work that is relevant to our chosen organization – articles which include the non-profit and public sector and are not tied to a specific industry or primarily focused on business success metrics like profitability or competitive advantage.

A strategic planning roadmap might begin with conversations with stakeholders intended to prioritize the long-term goals which express an organization’s mission, vision and values. This dialogue ought to be anchored by an audit of internal capabilities and analysis of the external environment. There are interesting questions about how these conversations are prompted, and who is included. An ideal approach would be to systematically gather input from all internal and external stakeholders. For a non-profit organization, this encompasses the entire staff of an organization and its volunteers, as well as its board of directors, external partners, advocates and donors, and the customers and communities it serves. We will revisit the topic of foregrounding

visitors in the strategic planning process in more depth shortly. According to Roth, each strategic (or, in his terms, *design*) decision must be “truly participative,” and he goes on to say that “everyone affected by a designed change must be made cognizant of that change, must be asked for input, and must agree to it before implementation, ensuring integration” (2015, p. 11). In order to move the strategic planning process forward, the number of people who assimilate and reflect on the content of all the collected “conversations” about the plan will be limited, and it is this group which will have to fuse this input with the mission to make strategic decisions.

The next phases flow from these decisions, though not always in the order laid out here: shaping an implementation plan that spells out a course of actions and timelines with which to achieve goals and objectives; budgeting required resources for prioritized projects and services; communicating the plan internally and externally; and measuring the outcomes of goal-oriented activities. Many planners add a final step: utilizing the performance metrics and outcomes as feedback to fine-tune the implementation processes or the plan itself. Common additions to this schema include other analytical processes (competition research, gap analysis, trend analysis / forecasting, scenario planning, etc.), efforts to synthesize analyses into insights and creative ideas, operational cost-cutting measures, the generation of alternative strategies to adopt or reject, establishment of policy guidelines and Standard Operating Procedures, marketing and public relations, and more. These processes can often be broken down into discrete steps, but in practice they are also deeply intertwined. Numerous authors underscore the difficulties involved in translating objectives into programs, policies and procedures. Echoing a widespread, presumably hard-won wisdom, Roth warns that “while most people focus on the definition of the objectives and goals phase of a planning effort as the most difficult and challenging, implementation rapidly becomes the most demanding” (2015, p. 7).

Much ink has been spilled in making propositions and dissecting questions about which processes or teams lead the others, and how to best think about the roles of planners, executives, managers in developing and executing strategy. Interestingly, Mintzberg states that failures in strategic management can be blamed “neither on formulation [of strategy] nor implementation, but on *the very separation of the two*” (1994, p. 285). Hunger and Wheelen emphasize the gravity of strategic decisions, claiming they embody three characteristics: “1. Rare. Strategic decisions are unusual and typically have no precedent to follow. 2. Consequential. Strategic decisions commit substantial resources and demand a great deal of commitment. 3. Directive. Strategic decisions set precedents for lesser decisions and future actions throughout the organization” (2002, p. 11).

Many writers key in on the need to sacrifice strategies from a set of possibilities, as in Pieterse’s advice: “A choice is not a choice until we decide what we will give up. We must subtract first, then multiply” (2017). Another common theme is the risk of rigidity that some strategic plans engender when an organization instead needs to maximize its agility and innovative potential. As Mintzberg writes, “strategic programming can do organizations harm by preempting the flexibility that may be needed to react to a changing environment” (1994, p. 341).

There are numerous other summaries of strategic planning which distill the process and its purpose more elegantly, for example Bryson’s description: “a deliberative, disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why” (2010, p. S256). Mintzberg offers a more poetic metaphor: “Strategies can be rich visions, intricately woven images that can create deep-rooted perspectives” (1994, p. 338). The importance of strategic plans is succinctly captured by Rosenblum: “if done well and implemented consistently [they] have the potential to transform an organization” (2018, p. 244).

Unfortunately or not, these crystallizations of planning do not prove that there is agreement among theorists or practitioners about basic questions as to how to go about it, or even define it.

Applicable Best Practices in Strategic Planning

The LAHM is both a nonprofit entity and a museum. We can usefully approach strategic planning theories and best practices from both identities. The economic vulnerability of both identities makes strategic planning more important, not less. As noted by Miller (2018, p. 24):

Nonprofit organizations (NPOs) are highly dependent on their external environment and vulnerable to effects from financial shocks, rapid technological change, and evolving stakeholder pressures (Bryson, 2011; Froelich, 1999). A common approach nonprofits use to address these changes and the resulting organizational challenges is strategic management (Black, Hinrichs, & Fabian, 2007; Mara, 2000).

In for-profit organizations strategic planning usually places emphasis on identifying and improving market share (Germano & Stretch-Stephenson, 2011). Nonprofits and museums, however, focus on resources and efficiency, rather than market share. As Rosenblum (2018) explains, strategic planning assists a non-profit organization to "...accomplish its goals with available resources" (p. 233). Museums, therefore, must focus on strategic problems of scale, efficiency and maximization of resources. A review of strategic planning resources for nonprofits by Miller (2018) shows that nonprofits found strategic planning helpful in a variety of management issues, including improving programs, improving marketing and communication to the public, and building organizational capacity.

In terms of specific strategies, there are a wide variety used by nonprofits, matching the approach of their core values and mission (Miller, 2018). However, for museums specifically several studies recommend a focus on visitor oriented strategic planning (Ioanna & George,

2019; McCall & Gray, 2014; Miller, 2018). Ioanna & George (2019) view visitors as both a strategic focus and a measuring rubric for museums. Their article posits that museums are still in various stages of implementing the “new museology” movement that has been evolving museum services for the last thirty years (Ioanna & George, 2019). The new museology approach de-centers the museum collection as the focal point of a public museum, and instead prioritizes the visitors themselves as the most important element of a museum (McCall & Gray, 2014). Because the visitor is centered, rather than the objects of the collection, the provision of museum services focuses more on communication than presentation and depends on the value added of emergent technologies and social media engagement (Ioanna & George, 2019). This, in turn, requires visitor oriented strategic goals (Ioanna & George, 2019).

Two studies pick out the specific strategic planning tools that constitute best practices for the visitor-centered museum including: goal setting based on visitor-related criteria (such as repeat visitors, visitor engagement levels, or number of visitors per exhibit); strategic analysis and SWOT with a particular focus on visitors as important stakeholders; strategic orientation (mission and values statements); strategic planning to bring the goals set in the strategic analysis state to an executable state; and implementation, wherein the museum strives to provide services and programs to a level that creates true visitor value and a desire for further engagement with the museum (Ioanna & George, 2019; Reussner, 2003). Reussner (2003) provides a model to help visualize the entire strategic management process.

To follow through on his model, Reussner (2003) provides further guidance on visitor-oriented goal setting. All goals should fulfill one of two functions; either broadening the visitor base or deepening the visitor experience to promote repeat visits (Reussner, 2003). This orientation of goals thereby provides metric data used to evaluate the success of the museum’s

implementation of the goals. Additionally, we can see the value of technological interaction and social media usage as helpful data collectors in terms of goal measurement, as well as useful tools for reaching goals.

Recent Long Term and Short Term Strategic Plan

We can compare elements of the LAHM's current strategic plans to the model and best practices laid out above. Prior to 2017 LAHM had gone through normal budget planning but had not done a strategic review (Ward, 2019). During the museum's 2017-2018 fiscal year the Board conducted both a Strategic Master plan (with a 3-5 year scope) and plan for Strategic Short-Term goals (1-2) years (Ward, 2019). Both of these plans were preceded by a SWOT analysis and focus group reviews (Ward, 2019). Reussner (2003) uses differing terminology, but similarly divides the strategic planning process into a long term vision (the changes the museum would like to make) and short term goal setting (deciding on concrete actions or steps to take to achieve those changes). For long term strategic vision LAHM has decided to focus on strengthening their brand, increasing community participation, improving facilities and increasing revenue (Los Altos History Museum, 2017). For short term implementation goals LAHM has chosen to create a capital campaign, expand online presence, increase open hours, leverage the board for fundraising, and emphasize narrative story telling (Los Altos History Museum, 2017).

Comparing LAHM's strategic planning to Rosenblum's (2018) recommendations there are both long term and short term strategies aimed at maximizing resources to accomplish the museum's mission. Every goal (with the exception of improving the facilities), is in direct service of improving the cost-benefit ratio of providing museum programs. Even the concept of leveraging the board is a means of creating better museum programs, as the board and its

experience and networking resources are an asset of the museum. The board's efficiency (like all boards) can always be improved through training, motivation, or re-dedication of vision.

In terms of centering the museum around visitor-oriented planning, several of the vision statements and implementation goals are clearly visitor-centric, such as improving the museum's brand, increasing community participation, expanding the online presence, increasing museum hours, and increasing narrative storytelling in museum exhibits and programs. Comparing the LAHM's vision and its implementation goals to Reussner's best practices recommendations we can see how targeted the LAHM's goals are, and perhaps how likely they are to provide maximum return on investments of time and resources. As noted above, Reussner posited that all strategic planning goals for visitor-oriented museums should either increase the total number of visitors or promote repeat visits from existing visitors (Reussner, 2003). Strengthening the brand and increasing the online presence are reasonably categorized as steps taken to increase the number of people finding and becoming interested in the museum and its mission and programs. Increasing open hours and emphasizing narrative in exhibits are good examples of goals that facilitate both new visitors and are likely to promote good experiences for increase in repeat visits from existing visitors. Increasing community participation is also likely to achieve both a broader visitor base and repeat visits, as community members willing to spend time or volunteer at the museum are more likely to recommend the museum to others or spend more time there themselves. Increasing revenue and leveraging the board for fundraising are goals which simply make the other goals achievable, and are thus in service of both of Reussner's categories. The improvements to facilities and the capital campaign to fund those improvements depends on the uses to which the facilities are put.

Their Strategic Plan did include a full SWOT analysis and focus group queries (Ward, 2019). However, not having access to the specific queries, we do not know what issues the stakeholders raised in terms of their museum experience. If a focus group of either museum visitors or community members (qua potential visitors) identified specific defects in the museum facilities that either kept them from visiting the museum or kept them from visiting the museum more often, then facilities improvements would be following best practices for visitor-oriented museums by increasing new or recurring visits. Similarly, if the focus group identified a specific type of event or program that they wished to participate in, but could not, due to facilities limitations, then facilities improvements would also follow recommended strategic best practices. However, if lack of facilities were not a major issue identified by the focus group (if, for example, the facilities improvements were intended simply to house a larger collection, whether or not the collection size was identified as a stakeholder issue), then likely that decision to prioritize facilities improvement would run counter to modern thinking about museum strategic planning, and might result in a use of funds with a much lower cost benefit ratio for the museum in the long term. This line of analysis remains theoretical, as the authors have not read the focus group reports and can only hypothesize on the board's reasoning in its planning decisions.

Finally, we can look at a core strategic planning tool: Vision Statement, Mission Statement, and Values. The LAHM vision statement references the connections between people (“intergenerational and intercultural”). Dr. Ward noted that the strategic plan began with a core question: Why does the museum exist? (Ward, 2019). It seems that the Strategic Plan has answered this question with a strongly community-centered and visitor-centered focus. A museum cannot facilitate connections between people without the active, enthusiastic

participation of the community itself. In this mindset, the visitor is both integral and foundational to the museum. While every strategic plan must be well-executed to be fully successful, the LAHM has certainly set its intentions to be a visitor-oriented museum.

Overall Evaluation

The museum has used modern approved tools of a non-profit to their advantage: fundraising events; campaigns and grants; communications with the LAHM focus community (newsletter and website); reaching out to other nonprofits, local schools, and governmental agencies to partner. Despite these strengths, the museum still struggles with some issues, some internally fixable and some environmental and outside of their control. Additionally, it was only in the last few years that the museum drafted a formal strategic plan; however, they had a focused approach to their mission, even before the current strategic plan was put in place.

Our group chose strategic planning as a topic for our literature review because the LAHM has only recently begun to use this tool. We felt we could contribute a deepened understanding of strategic planning's usefulness and its specific application to the LAHM. Strategic planning is best described as linear but iterative (steps may be repeated), effective but not tightly controlled (as the goal is change, and change is messy). Visitors essentially form the conceptual focus for most modern museums. Visitors form the community support and donor base. For museums specifically, visitors are critical to strategic planning process as they provide a stable, measurable rubric for evaluating goal achievement.

While there is much that the LAHM is doing well, there are still challenges to be resolved and places for improvement. The available scholarly theory and guidance influenced our actionable recommendations and re-imagining of the LAHM Vision, Mission and Values statements to help them reach their goals.

Part 4 – Recommendations for the LAHM Vision, Mission Statement, and Values

The Los Altos History Museum is strongly rooted in Los Altos, past, present, and future and their Mission, Vision, and Values statements, which were recently updated by the museum, currently reflect this. Speaking about the goals of the museum, Ward states: “We do want to preserve the past; we want to talk about the present; and we want to think about how those things are going to influence our choices in the future” (KMVT, 2019).

As our Environmental Scan and SWOT above shows, while the formulations of the Vision, Mission Statement and Values are strongly visitor-centric, the strategic goals and implementation could be more strongly tied to best practices recommendations for visitor-oriented planning. Not every short term goal was specifically designed to either increase the visitor base or increase repeat visits, nor were all associated with a specific measurable rubric that would help determine the success level of that specific goal.

Following current best practices for strategic planning for museums, we were able to make small changes to the Vision, Mission, and Values statements that we think reflect both where the museum is now and where it would like to be in the future, particularly by setting up our revised statements from a reflective perspective of the museum’s overall purposes. Our new approach could assist the LAHM to focus further on their position as an interactive partner with the community.

Vision: The Los Altos History Museum aspires to tell the stories of the greater Los Altos area, past and present, to increase intergenerational and intercultural connections.

Mission: Our mission is to preserve and share our local history by presenting stories and artifacts in an engaging manner through a variety of interactive, observational, and participatory educational programs and exhibits.

Values:

Knowledge: We seek to explore the artifacts and events that shape our local community and invite our members and visitors to join us.

Innovation: We endeavor to emulate the creative power of this region's people and incorporate this creativity throughout our programming.

Diversity: We reflect California's diverse ethnic history and strive to emphasize and celebrate it.

Scientific Integrity: We seek to hold ourselves to the highest academic and curatorial standards as a part of our community's robust leadership in scientific education.

Part 5 – Transitional Paragraph to Part 2

Through our research we found that the Los Altos History Museum is quite successful as a local history museum. They are in a central location and have made good use of their community while giving back to it. However, there is always room for improvement. The LAHM is in a position for growth and movement towards the future and they are working towards improvements through strategic planning. After performing an environmental scan and SWOT analysis as well as a literature review on the best practices for strategic planning we hope to suggest strategic goals that can improve their organization.

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Group W Organizational Analysis – Part 2

Los Altos History Museum

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Abstract

This report continues the Organizational Analysis of the Los Altos History Museum by providing three strategic goals for the museum to implement in order to solve concerns raised by the previous SWOT and Environmental Scan done for the museum. Each goal is broken into objectives and further subdivided into action items and tasks so that a step by step guide is created for implementation. A deficit of volunteers, underutilized social media, a need for increased income, and a curatorial aim to increase programs to and study about the Mountain View area were all identified as areas needing addressing in the previous report; therefore this report contains three actionable goals designed to address those issues by increasing social media presence and intern participation, increasing museum store revenue, and creating an innovative new exchange program with the Mountain View History Center. Additionally, the report includes specific suggestions for increasing the use of targeted metrics in measuring the effectiveness of strategic goals. The report includes links to resources needed and an annotated bibliography for reference and to make the reports action items easier to implement. The report is intended to be used in conjunction with presentation materials as a means of supporting and assisting the Los Altos History Museum in striving to reach their goals.

Key words: Strategic Planning, Museum, Strategic Goals, Los Altos History Museum

Introduction

The Los Altos History Museum (LAHM) has rooted itself in its community, established a stable donor base, and created a robust vision and mission for preserving and presenting local history and creating intergenerational and intercultural connections. However, the LAHM has only recently begun strategic planning to expand and improve its programs, to resolve current weak points in its funding and resources, and to fully implement its curatorial vision. The LAHM is in a good position to move forward into the future but, based on a recent SWOT Analysis and Environmental Scan, could use additional strategic planning resources to achieve its ambitious goals.

In their survey of best practices for strategic planning for libraries Germano and Stretch-Stephenson (2012) made an observation that holds true for strategic planning for all information-based organizations, particularly for non-profits:

[S]trategic planning success ... should be based upon the achievement of an organizational leader's vision that is validated by market realities in the form of user needs that employees can communicate via marketing based tactics and communications to patrons. Furthermore, ... success is further predicated upon value creation that allows the library to achieve measurable, value-oriented goals as part of the plan's execution whether they are related to fundraising, succession planning or something as straightforward as increased use of the library (p. 73).

This Part 2 of the Organizational Analysis report for the Los Altos History Museum is predicated on the findings of the SWOT analysis and environmental scan and the new

focus from the revised vision, mission and value Statements. This report uses the organization's leaders' curatorial and organizational visions for the future of the LAHM, as based on an in-depth in-person interview provided to us by Executive Director Dr. Elisabeth Ward, pre-existing interviews conducted with Dr. Ward, and the Board's vision and directives as provided in the annual reports. The aim of this report is to leverage those aspirational goals into specific strategic goals, broken down into objectives and actionable tasks. Each goal and task is designed based on the best practices laid out in the Literature Review of Part 1 of the report including both classic strategic management planning from the business world and specific achievement goals for visitor oriented museums. In particular, these strategic goals have been focused to increase the visitor base, improve visitor return visit rates, and increase the revenue base of the museum. Following each goal are suggestions for measurable rubrics to help the LAHM measure not only the success of each goal but also to continue to focus on visitor-based metrics.

Strategic Goals and Objectives

Goal 1: Expand use and promotion of social media, including through a new social media intern position.

Through the recent SWOT analysis and environmental scan of the LAHM, a lack of social media presence was identified as one of the LAHM's weaknesses. The LAHM has profiles on several social media platforms including YouTube, Facebook, Twitter, and Instagram. However, the LAHM does not adequately promote these platforms. It only includes links to its Facebook, YouTube, and Flickr profiles on their website, and these links are hidden in the bottom right corner of the page, meaning they are easily missed. Of these linked profiles, both

YouTube and Flickr have not been updated in the past 4 years. The LAHM's other social media profiles were only locatable through a dedicated web search. Based on this, it is clear the museum's presence on social media is minimal and what little does exist is poorly promoted. A literature review illustrated that social media can be a useful tool for increasing visitors to the museum (Reussner, 2003).

As part of its new vision statement, the LAHM aims to promote intergenerational connectedness. Considering that the younger generations have grown up with social media, increasing its social media presence could be a great way for the LAHM to connect with this group. Given that the LAHM is run primarily on volunteer hours, they may struggle to find a volunteer with the desire and enough free time to overhaul their current social media practices. This goal recommends the LAHM make use of its internship program with Foothill Community College to create an intern position designed to grow its social media presence. Since the internship program started recently this would be a good way to define specific roles for the college interns. Currently, the interns at the LAHM lay somewhere between staff and volunteers, as the work they do overlaps with the other two groups (Ward, personal communication, 2019).

Objective 1.1: Delegate administration and posting responsibilities on primary social media platforms to intern.

Action and assessment plan

1. Designate some Foothill Community college interns as social media focused interns. This subcategory can be advertised with the internship to find those students who are the most interested in this work and who can bring significant social media experience with them. Use the experience and input of the first interns recruited to create job descriptions for the

internship positions, including expected number of hours per week devoted to the work, number of posts expected, type of posts expected (for example, text only, graphics, audio or video posts, and range of platforms the LAHM expects interns to have experience with). The expected work should include the following points as well as the work outlined in Objectives 1.2 and 1.3.

2. Post interesting and relevant material to all platforms on a regular basis. This would primarily be information about new exhibits and upcoming events but could include other information like fun facts about what happened that day in local history.
3. Keep an eye on comments and direct messages to answer any questions that come up and promote communication with the community.
4. Track metrics for the social media site (likes, follows, site visits, comments, re-posts, etc.). Interns should also periodically post surveys or solicit comments to help track visibility, reputation, and interest in the museum.

Objective 1.2: Promote social media pages

Action and assessment plan

1. Add links for all social media pages to the website and draw attention to them by placing the links in a prominent location. One example of doing this would be to add the links to the “contact us” section of their website.
2. Embed a feed for a popular platform (Facebook or Twitter for example) to the homepage of their website to encourage traffic to their social media pages.

3. Create a sign that can be put up in the museum with information on their social media pages. This will encourage visitors to the museum to find and follow the LAHM's social media accounts.
4. Check and record follower numbers to determine how well promotion of social media pages has increased usage.

Objective 1.3: Create guidelines and procedures for the next intern or a volunteer to follow in order to continue growing the LAHM's social media presence.

Action and assessment plan

1. Record the schedule of their postings, such as if they are posting once a month or twice a week.
2. Establish standard formats, styles, and acceptable content for all postings.
3. Reflect and record what has worked well and what has not, this way the next intern has some context for where they are picking up the project and can understand the intentions of their predecessor.

Goal 2: Increase income generated through the Museum's Store by providing new services and products for purchase.

This second goal focuses on strengthening the Museum's Store in order to create more income for the Museum. While the LAHM has been clear in defining its vision and purpose, it still seeks further funding to achieve its goals (Los Altos History Museum, 2018). Currently, the income generated from the store is within the field of Rentals, Store & Other, a field indicating that cumulatively these different sources are generating some money (Los Altos History

Museum, 2018). However, if the Museum's Store could begin generating more money, it could be considered a field of its own and bring in more substantial income for the LAHM. In order to accomplish this goal, the task can be broken into four main objectives:

1. The Museum could buy a self-publishing machine to publish historical and/or local authored books and create their own print runs of academic books.
2. The LAHM can increase production of items with their logo and sell these items in the Museum's store.
3. LAHM can create one or more pop-up shops for public outreach in Los Altos.
4. The LAHM can sponsor a contest or work with a third party to produce a boardgame based upon local history for sale in the store.

Objective 2.1 The Museum should purchase or lease a self-publishing book machine to publish historical and/or local authored books and create their own print runs of academic books.

Self-publishing has been done for centuries by many different authors. Arūnas Gudiniavičius (2015) in an article titled "Is self-publishing a salvation for authors? The case of Lithuanian printed bestseller in the digital environment" points to Benjamin Franklin as being one of the first authors to self-publish, then continues to name more authors who have self-published. Gudiniavičius continues developing the idea of self-publishing, stating, "Some argue that publishing houses as publishing service providers have no future. Lynch (2001), more than ten years ago, noted that while self-publication might work in theory, the major problem was still finding readers" (48). Gudiniavičius explains that the writer has to find an audience of people who might want to purchase their books.

However, if the Museum were to purchase a book machine for authors to publish through the Museum, a strong partnership could be formed with local historian authors - the authors research, write, revise, edit, etc. while the Museum provides a way for these authors to print and distribute their books. Ideally, the Museum would profit from the prints of these books, and the author collect royalties. In regard to what an author usually receives for his work, an author generally collects 8% on the first 150,000 copies' retail price (Jacobson, n.d.) and increases to 10%, but the Museum may want to modify this based upon what type of relationship they want to have with the author. The Museum will retain full editorial power to publish only those works they determine to be good representatives of the Museum's focus, values, and academic standards.

In addition, with these book machines, the Museum never has to print more inventory than necessary leaving more space for other inventory.

Action and Assessment Plan

1. Purchase or lease a book machine like the Espresso Book Machine® by On Demand Books and necessary related software for the machine.
2. Create a planned list of topics the Museum would like to prioritize in publishing. Options could include local biographies, oral histories of certain events or places in the area, studies on different local industries or institutions, ethnographic or anthropological topics.
3. Form new partnerships with local authors and historians where both the Museum and author benefit/profit. The LAHM can identify some local institutions that often create academic studies, professional articles, or informal articles on local history, including

University and colleges, community colleges, other local art and history museums, and local historical societies. The LAHM can also advertise or post in spaces that form community hubs for local authors, such as bookstores, or online social spaces such as Facebook and Reddit.

4. Limit print inventory within the Museum and leave this extra space for other print inventory.
5. LAHM should consider adding to any survey that asks “how did you hear of our museum” an answer “by reading a museum publication,” in order to help track the effectiveness of this new program at attracting more visitors, as well as tracking the metrics for increased income for the museum.

Objective 2.2 Increase production of items with the LAHM name and logo and sell these items in the Museum’s store.

One issue identified with the Los Altos History Museum’s Store is the lack of exclusive inventory. The store could begin selling t-shirts, tote bags, bookmarks, and other items tied to more permanent exhibits.

T-shirts and tote bags with the Museum’s logo artfully included could motivate museum visitors to purchase items from the store. Both t-shirts and tote bags can be produced cheaply, and with varying levels of price markup for customers. The article “The Cost Breakdown of Pricing a Shirt” explains that the raw materials, spinning the yarn (from cotton), shirt labor (dyeing, fabric-making, cutting, and sewing), shirt design, design printing all happen at a reasonably low price. Then the wholesaler adds a lot of other costs, including a markup, before it gets to the retailer with a final retail price. The retail price is enough to cover the production and

wholesaler price while bringing in a profit for the retailer (Garcia, 2007, May 13). Tote bags undergo a similar process as t-shirts and are also very marketable.

In addition to customers purchasing these items, it is another marketing method the LAHM can use in order to bring more visitors to the museum. For example, if a visitor is wearing a t-shirt with the Museum's logo around a friend, that friend might then ask about the shirt and the museum, the visitor can tell the friend about the museum, and that friend could then make a decision to visit the museum when she/he wasn't originally going to. These t-shirts and tote bags make the museum more visible for those who hadn't heard of it before.

In order to ensure that merchandise appeals to customers, the Museum could produce potential designs and use social media in order to gather information on which designs are most appealing to customers and learning which designs or items would be most profitable.

Action and Assessment Plan

1. Produce designs for potential t-shirts and tote bags by running a survey through social media to learn which designs are the most appealing.
2. Find a t-shirt, tote bag, and merchandising company (companies) to produce merchandise exclusive to the museum.
3. Consider limited edition items for seasonal or temporary exhibits.

Objective 2.3 Create a pop-up shop for public outreach in Los Altos.

A pop-up shop is a temporary shop designed to attract public attention and helps the public discover a place of business. Pop-ups have proven to be successful at spreading the word of organizations, businesses, and individuals by creating new interest and new buzz. In an article

titled “Exploring pop-up libraries in practice” the authors of the article state, “Ultimately, they help communities discover new ways to engage, interact and progress. The important elements are the concept, the location and creating a memorable experience” (Davis, Rice, Spagnolo, Struck, & Bull, 2015).

Pop-ups take a lot of time, research, and planning; however, they are worthwhile in regard to outreach. The Museum can begin with simple pop-ups at the farmers market, local fairs, and/or Fine Art in the Park. The LAHM can create a small table exhibit for their pop-up to garner interest from the public, sell t-shirts and tote bags as described in the prior objective, share information on current and future exhibits, and use the pop-up as a means to recruit volunteers. “Exploring pop-up libraries in practice” outlines how pop-ups can work for libraries; however, the Museum could also reap some of these same benefits: increase awareness, form new partnerships, and increase income. While these are definite benefits to a pop-up, there can be risks including theft, vandalism, and staffing concerns; therefore, additional training for the museum staff would be recommended to mitigate any risks.

Action and Assessment Plan

1. The LAHM should first gather materials in order to create a pop-up shop: canopy, tables, chairs, and products to sell. Specific materials directly used for the pop-up shop can be solicited as in-kind donations during other fundraising events or charity drives. Additionally, professional signage could be donated from local sign shops as donations to the museum.
2. The museum should create a small mobile exhibit and place in the shop where everything can be safe, but also generate interest from the public. This could include replicas of

materials or artworks, photos or dioramas of exhibit information, or graphics from events like the STEM fair. Again, materials can be donated, work to replicate materials could be volunteered, or photograph owners or the owners of graphic materials such as STEM fair students could give permission for their work to be shown in replicated form.

3. Have LAHM staff create a short training module or materials to help volunteer staff understand this aspect of their docent experience including expectations for customer service, answering questions, protocols for handling or tracking sales, and safety and anti-theft protocols.
4. Set up pop-up at the farmers market, local fairs, and Fine Art in the Park. For any of these that charge a fee for booth or table privileges a waiver can be requested as a donation, or tabling fees could be raised as a small fundraiser for that purpose.
5. Engage with the public sharing information about the Museum's exhibits, interest in partners, and volunteer opportunities. Part of the staff training should include keeping simple tracking notes on number of questions answered about the museum as well as email sign-up sheets or a QR code to a site with a site visit tracker to help keep metrics on the return on this investment of the museum's time and resources.

Objective 2.4 Produce a board game based upon local history

Over the last few years, board games have increased in popularity. In an article titled "The Future of Gaming," M. Brandon Robbins explains the rise of board games: "The economy continues to put a strain on middle-class families, young professionals, and older adults. Many people in these demographics enjoy games... Board games are a cheaper alternative [to videogames]; they can be played to their fullest extent even without expansion material and added content, and they require nothing but physical space" (Robbins, 2016, September 15,

p.59). Furthermore, the board games market is now worth \$3.2 billion and is predicted to rise to \$8.12 billion by 2021. (Sargeantson, 2019). Considering this, it is recommended that the Museum create a local history-themed board game that people can own at a reasonable price.

To create this game, we recommend LAHM create a small contest for game developers to create a fun game based upon the history of Los Altos, and then crowdfund the winner through Kickstarter.com in order to fund game production. Kickstarter is an all-or-nothing project funding site, where prospective supporters of a product can pledge money in advance of the project being created, thereby providing creators with the funds to create the item (Kickstarter, n.d.). About Kickstarter.com and the development of games, stonemaiergames.com, reports that “tabletop games raised \$165 million on Kickstarter” (Design, 2019). Games on Kickstarter.com are very successful when it comes to crowdfunding (over \$4 billion in funded projects as of May 2019, Wikipedia, n.d.).

Action and Assessment Plan

1. Create a contest with prizes for board game creators. Advertise the contest so that board game creators are aware of the contest. As the board gaming craze has exploded, so have the number of prospective, independent, and small industry board game creators. One place to start the process and learn more about board game creators is at the reputable and well-trafficked board game site BGG, whose board game creator forum is one of the largest in the country (<https://boardgamegeek.com/forum/26/boardgamegeek/board-game-design>).
2. Consider the themes or story the LAHM would like their game to tell, or a way the game can hook kids and adults into the fun and interest the museum provides.

3. Accept submissions for the contest.
4. Gather judges to play each board game and decide upon the game that judges found the most fun and that the LAHM staff feels conveys the message, vision or themes of the museum most effectively.
5. Use Kickstarter to crowdfund board game project. Because of the popularity of Kickstarter recently, there are many guides to help first-time project creators use Kickstarter successfully and safely, as well as best practices for delivering a project on time and on budget, and how to avoid common customer service issues with crowd-funded projects. This article from Medium.com is a good example of easy guides to help first time Kickstarters (<https://bit.ly/36pB2Bp>). Because the Kickstarter process is a major project, LAHM should consider soliciting a volunteer specifically to act as the project manager for this process. A successfully funded Kickstarter is a valuable resume item for a young entrepreneur, so this would be the perfect one-off project for a volunteer or intern recruited through LAHM's Foothill or even Los Altos high school docent project.
6. Sell game in store. After the initial print run is funded, LAHM should evaluate the metrics to determine if a second print run is a good return on investment.

Goal 3: Expand the Los Altos History Museum's profile and visitor base in Mountain View.

LAHM's Executive Director Dr. Elisabeth Ward has stated that she views the neighboring city of Mountain View as part of the community that the museum wants to reach, serve, collaborate with and include in its curatorial purview. She notes that Los Altos was only incorporated in 1952, and that the region that includes the adjacent city of Mountain View share

a history spanning from an agricultural past to the present-day Silicon Valley economy (KMVT, 2019).

These comments can be expressed as a strategic goal: to expand the museum's profile or footprint in Mountain View. Strategic planning is intended to be visionary, and aspirational, as this goal is (Mintzberg, 1994). Once the goal is envisioned, however, it must be laid out as identifiable steps for implementation (Rosenblum, 2018). This goal can be broken down into three interrelated objectives: to increase visitors from, links with, and content about Mountain View.

Addressing the first two of these objectives, the LAHM can proactively facilitate a "student exchange day" in which children from Los Altos' schools visit the Mountain View History Center at the Library, while children from Mountain View schools take a field trip to the LAHM. It probably doesn't matter if these visits occur on the same day, and they might be broken up into multiple visits staggered over some period of time to accommodate the excess children who can't be hosted in one visit. Both the LAHM and the Mountain View History Center at the Library already offer class tours for local schools, a fact which may lighten the demand on resources they'd need to commit to make this kind of student exchange possible.

The benefits of a student exchange apply to two of the objectives of the strategic goal of expanding the LAHM's reach and profile in Mountain View: first, boosting visits from residents of Mountain View. This likely will cause a "knock-on" effect, fueled by word of mouth recommendations, where parents and other adults in Mountain View will become aware of the LAHM through their children and their children's teachers, and some will become curious

enough to visit. Additional benefits may flow from this increase in visitors such as future volunteering commitments and donations.

As for the second objective, collaborating with the Mountain View History Center at the Library / Mountain View Historical Association will open up new avenues for future partnerships between these three organizations. Given that the Mountain View History Center and Historical Association have connections with a range of other organizations based in Mountain View, the school exchange and collaboration it depends on could offer LAHM entry into a network of cultural, civic, business and other groups in Mountain View.

The expansion of LAHM's web of potential partners should lend support to the third objective: adding content / programming – exhibits, events, etc. – that incorporates important history, cultural trends, and collectible material from Mountain View. It's worth noting that LAHM has already collaborated with organizations in Mountain View such as the Day Worker Center of Mountain View (Los Altos History Museum, 2018), the Mountain View Library (Los Altos History Museum, 2015) and has invited high school students from Mountain View to participate in an exhibit that explored tools and crafts from the 19th century (Los Altos History Museum, 2018).

Opportunities to expand LAHM's visitor base, profile and relationships in Mountain View can be further enhanced with direct contact with the Mountain View Historical Association's board and executive leadership to explore new possibilities for collaboration and reciprocity. This programming could feature materials collected which pertain to Mountain View. For example, the scope of the oral history archives at LAHM could be widened to include

Mountain View residents. Executed and marketed thoughtfully, content along these lines will draw new visitors to the museum from the surrounding area, including Mountain View.

Rosenblum notes: “Because strategic plans are focused on high-level outcomes rather than immediate outputs, they tend to be fairly long term in scope” (2018, p. 233). Strategic goals are generally oriented to a horizon of several years, and this particular goal of increasing LAHM’s presence in Mountain View is no different. Given the importance of visitor-based metrics to museums, a long-term investment in this third strategic goal could drive meaningful progress on those key outcomes.

Action and Assessment Plan

1. The LAHM, the Mountain View History Center at the Library (run by Mountain View Historical Association), and schools in Los Altos and Mountain View will collaborate and coordinate with one another to create a museum exchange day.
2. LAHM will offer to help Mountain View School District co-ordinate a LAHM visitation day for the appropriate age elementary school classes.
3. LAHM will reach out to their current partners and liaisons at the Los Altos School District to help coordinate an exchange visit to the Mountain View History Center.
4. LAHM should consider offering specific materials for visiting children so that they leave with an activity or artwork to show parents and to use as a souvenir which will help create positive memories of the visit.
5. LAHM should follow up the museum exchange project with further collaborations with the Mountain View History Center, exploring their overlapping archives and celebrating their shared vision for local history. Specifically, exhibits that explore aspects of shared history and culture in Mountain View and Los Altos, along with the greater Santa Clara

Valley, could address any number of interesting topics: architecture, business, ethnic diversity, ecology, technology, marginalized communities, literature, photo archives, and much more.

6. LAHM should continue to cultivate a close working relationship with the Mountain View Historical Board.
7. LAHM should carefully note any increase in visitor metrics before and after implementation of this goal. If LAHM currently tracks (or has plans to track) the home city of its visitors (through surveys, subscription metrics, donations metrics, volunteer metrics, or other visitor information), it should make a special note of any increases in the participation by Mountain View residents.

Conclusion

While some of these goals may take time to fully implement, all of the above goals can be started on immediately, with the tools at hand. Each of the first steps is designed to help the museum gather the necessary resources for the tasks, whether that means volunteer resources or discretionary funding for specific projects. This report was written from the viewpoint that the LAHM is a robust and resourceful organization with committed community support; thus, it can and should reach for ambitious goals and a continued higher achievement of its vision. Ideally the LAHM will continue to solicit input from its stakeholders, fully engage the Board and the community, and continue its strategic planning journey, hopefully with some help provided by this report.

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Germano, M. & Stretch-Stephenson, S. (2011). Strategic value planning for libraries. *The Bottom Line: Managing Library Finances*, 25(2), 71-88.

This article explores the specific translation of the corporate strategic planning process to the library as a public institution and information organization. It helps the reader to understand why strategic planning is so important for a public or non-profit institution, who the stakeholders are and why their input is necessary, and how a SWOT and Environmental Scan should be tailored to a library.

Gudinavičius, A. (2015). Is self-publishing a salvation for authors? The case of Lithuanian printed bestseller in the digital environment. *Libellarium: Journal for the Research of Writing, Books & Cultural Heritage Institutions*, 8(1), 47–58. <https://doi-org.libaccess.sjlibrary.org/10.15291/libellarium.v8i1.213>

This article explores the mechanics for self-publishing books, either through one's own means of productions or through a third-party self-publisher.

Hunger, D. H., & Wheelen, T.L. (2002). *Essentials for Strategic Management*. Upper Saddle River, NJ: Pearson Education.

This article focused on strategic planning with an emphasis on tools used.

Ioanna, G. & George, T. (2019). Visitor-oriented strategic museum management for small regional museums. The Greek case of the Ethnological Museum of Thrace. *Journal of Regional and Socio-Economic Issues*, 9(1), 33-44.

This article expands on the concepts found in Ruessner's work for the visitor-oriented museum and adapts strategic planning tools directly to museums. It emphasizes visitor-oriented metrics for measuring effectiveness and looks at the implementation in a case study of a Greek museum.

Jacobson, A. (n.d.). The Business of Publishing. Retrieved October 31, 2019, from <https://www.alanjacobson.com/writers-toolkit/the-business-of-publishing/>.

This article contains a guide for novices to understanding the publishing industry use of royalties. It also explains many details of the relationship between publisher and author, giving information on industry specific terms.

Los Altos High School (2018). School accountability report card reported using data from the 2016-17 school year. Retrieved from <https://www.mvla.net/site/handlers/filedownload.ashx?moduleinstanceid=5845&dataid=5975&FileName=SARC%20LAHS%202017-18.pdf>

This site was used to provide a profile of the Los Altos High School, and to give context to the partnership between the school and the Los Altos History Museum.

Los Altos High School (2019). *LAHS 2018-2019 school profile*. Retrieved from https://www.mvla.net/site/handlers/filedownload.ashx?moduleinstanceid=5843&dataid=5974&FileName=LAHS_School_Profile_2018_2019_2_pgs_10.25.2018.pdf

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Los Altos History Museum (2015). *2014-2015 Annual Report*. Retrieved from <https://www.losaltoshistory.org/about/governance/annual-reports/>

This page was used to explore specific events, exhibits, and funding issues reported by the Los Altos History Museum in recent years.

Los Altos History Museum (2016). *2015-2016 Annual Report*. Retrieved from <https://www.losaltoshistory.org/about/governance/annual-reports/>

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Los Altos History Museum (2017), *Los Altos History Museum Strategic Plan, 2019-2024*. Retrieved from LAHM archives.

This page helped guide context for publicly available information about the new Los Altos Museum Strategic Plan.

Los Altos History Museum (2017, May 12). *Los Altos museum seeks volunteers*. Retrieved from <https://www.losaltoshistory.org/2017/05/volunteers-needed-docents-museum-store/>

This page provided further context on the type of volunteers needed for the LAHM and the types of work the volunteers currently do.

Los Altos History Museum (2018). *2017-2018 Annual Report*. Retrieved from <https://www.losaltoshistory.org/about/governance/annual-reports/>

This page was used to explore specific events, exhibits, and funding issues reported by the Los Altos History Museum in recent years.

Los Altos History Museum (2019). *History*. Retrieved from <https://www.losaltoshistory.org/about/mission/history/>

This page was used to help give context on the history of the LAHM and its place in the community.

Los Altos History Museum (2019). *Volunteer*. Retrieved from <https://www.losaltoshistory.org/support/volunteer/>

This page provided further context on the type of volunteers needed for the LAHM and the types of work they currently do.

Kickstarter (n.d). What do you wish you had known before launching your Kickstarter project? *Medium Magazine*. Retrieved from: <https://medium.com/kickstarter/what-do-you-wish-you-had-known-before-launching-your-kickstarter-project-3a493cf12437>

This article asks several successful Kickstarter users to provide advice to the first-time Kickstarter user. The answers help detail what makes projects successful.

KMVT (2019, August 15). *In Our Community - Los Altos History Museum* [video file]. Retrieved from <https://www.youtube.com/watch?v=Sm5ncfZlOnU>
McCall, V. & Gray, C. (2014). Museums and the 'new museology': theory, practice and Organizational change. *Museum Management and Curatorship*, 29(1), 19-35.

This in-depth interview conducted by local TV station KMVT provided a great deal of contextual background in understanding the LAHM's goal, its challenges, and its vision.

Miller, E. (2018). Nonprofit strategic management revisited. *Canadian Journal of Nonprofit and Social Economy Research*, 9, 23-40.

This article provided a background on the evolution of strategic management, and set a framework for adopting current best practices in strategic management to the specific needs of non-profits. It particularly focused on the use of strategic planning in aiding a non-profit to expand its scope and vision.

Mintzberg, H. (1994). *The Rise and Fall of Strategic Planning*. New York, NY: The Free Press.

This article traces the evolution of strategic planning since its inception in the 1950's. The article lays out the major lines of theory, commonly used approaches, and specific models forming the current vocabulary for strategic planning tools. It was helpful in understanding the basic scope and purposes of strategic planning, as well the process of implementation.

Pieteron, W. (2017, February). Strategy is an Art of Sacrifice. *Columbia Business School* website. Retrieved from <https://www8.gsb.columbia.edu/articles/ideas-work/strategy-art-sacrifice>

This article had helpful general information on the importance of setting priorities and paring down goals for successful planning. This article was not non-profit oriented, but was a helpful perspective for the limited-resource environment that non-profits must navigate.

Robbins, M.B. (2016). The Future of Gaming. *Library Journal Website*. Retrieved from: <https://www.libraryjournal.com/?detailStory=the-future-of-gaming-games-gamers-gaming-september-15-2016>

This article looks at the upcoming trends in the game industry.

Reussner, E. (2003). Strategic management for visitor-oriented museums. *The International Journal of Cultural Policy*. 9(1), 95-108.

This article sets out a strategic planning framework specific to museums. It lays out reasoning as to why a museum must be focused on the visitor as both goal and metric for success. And it helps provide both conceptual and practical guidance for crafting goals that will

Rosenblum, L. (2018). Strategic Planning. In S. Hirsch (Ed.), *Information Services Today*, (pp.231-245). Lanham, MD: Rowman and Littlefield.

This chapter in Hirsch's book is centered on Strategic Planning for information organizations. It helps to illuminate the management issues involved in Strategic Planning, as well as understanding what internal and external influences mean in an information organization.

Roth, W. F. (2015). Strategic Planning as an Organization Design Exercise. *Performance Improvement*, 54(6). doi.org/10.1002/pfi.21487

This article focuses on strategic planning for organizations facing rapidly changing environments. It was also quoted on its discussion of the importance of input from stakeholders, and how to understand stakeholder goals.

Sargeantson, E. (2019, June 21). Why Board Games Are So Popular in 2019. Retrieved October 30, 2019, from <https://mykindofmeeple.com/why-are-board-games-popular/>.

This article helps explain the social and psychological reasons for the current immense popularity of board games, in particular their appeal to younger people. It helps provide a picture of what people are seeking in board games.

U.S. Census Bureau QuickFacts: Los Altos city, California. (2018). Retrieved from <https://www.census.gov/quickfacts/losaltoscitycalifornia>.

This citation represents the Census report page for Los Altos city. This census information provided insight on the community in which the LAHM is rooted and was an important component of the Environment Scan.

Ward, E., personal communication, October 10, 2019

This citation represents the in-person interview granted to the authors by Dr. Ward in October 2019. This in-depth interview allowed us to ask specific questions on the museum, its goals, and its current plans and visions.