

CITY OF OAKLAND
AGENDA REPORT

20070424 11:5:29

TO: Office of the City Administrator
ATTN: Deborah A. Edgerly
FROM: Oakland Museum of California
DATE: April 24, 2007

RE: **Supplemental Report on Performance Measures for the Oakland Museum of California 2005/2006 Fiscal Year and Informational Report on Education and Community Programs**

SUMMARY

This report provides supplemental information requested by the Life Enrichment Committee at its December 12, 2006 meeting regarding Performance Measures for the Oakland Museum of California as set forth in the FY 05-06 Budget. In addition, the Life Enrichment Committee directed staff at its meeting on September 12, 2006 to return to a future meeting with a report on the Museum's community and educational programming and how the Oakland Museum of California Foundation and the Museum are working together to better serve the various communities in the city. This report provides information on these programs as well as more detailed information related to performance measures for educational programs. Finally, as noted in the City Administrator's letter of February 27, 2007 the Museum has recently completed a strategic planning process as part of its reaccreditation by the American Association of Museums that includes an updated mission statement and goals and objectives for the next five years. Therefore, this report includes information about the Museum's current strategic goals and Performance Measures for the upcoming budget cycle.

A full copy of the Strategic Plan, as approved by the Oakland Museum of California Foundation, is attached. Per the Management Operations Agreement between the City and the Foundation, the Museum's strategic planning is a shared process between the two entities. Of particular note is the section of the Plan on Governance, which specifically addresses the Museum's role in advancing the City's services to its residents.

FISCAL IMPACT

This report is informational only and has no fiscal impact for the City.

BACKGROUND

The mission of the Oakland Museum of California is to connect communities to the cultural and environmental heritage of California. Through collections, exhibitions, education programs, and public dialogue, we inspire people of all ages and backgrounds to think creatively and critically

Item: 5
Life Enrichment Committee
April 24, 2007

about the natural, artistic and social forces that characterize our state and influence its relationship to the world.

In size and depth of collections, the Oakland Museum of California is one of the foremost regional museums in the country, with more than 1.9 million objects including art work in all media, artifacts and objects spanning the history of the state, and natural specimens from California's diverse habitats. With more than 100,000 square feet of gallery space on four-city blocks, it is one of the largest cultural institutions in the San Francisco Bay Area and the only museum devoted exclusively to the art, history, and natural environment of California.

The Oakland Museum is well-known locally, regionally, and in the national museum field for the scope and quality of its education programs. Working in partnership with local school districts and community organizations, OMCA presents one of the most extensive arrays of youth education programs provided by any cultural institution in the San Francisco Bay Area. These offerings include school group tours, classes, workshops, performances, work/study opportunities, suitcase exhibits, and curriculum materials. In total, these programs serve approximately 75,000 young people annually.

OMCA provides 35 different School Programs serving elementary and secondary students. A variety of classes, tours, and outreach activities are offered -- exploring California's unique art, history, and environment. Multi-session classes provide in-depth, sequential learning experiences and take place both in the museum and the school classroom. Museum programs are taught by artists, naturalists, historians, scientists, museum teachers, educators, and docents.

In addition to school programs, the Museum presents a year-round series of weekend family workshops, bilingual programs, performances, and activity days emphasizing intergenerational learning. Family programming often links to the Museum's community and cultural enrichment programs. Dance, music, drama, storytelling, and other special performances for children and their families celebrate the vitality and cultural diversity of Oakland and the Bay Area community. For example, *Lunar New Year Family Day* presents Pan Asian exhibits, music, dance and art making activities. African American cultural programs take place as part of *Black History Month* celebrations, which this year extended over a three-month period. A community-wide celebration for *Days of the Dead* honors the memory of ancestors and loved ones and, in 2006, attracted some 5,000 participants.

While the Museum and the City of Oakland can well be proud of these accomplishments, the Museum is now working toward the next phase in its history with the first major renovation of its building and reinstallation of collections in dramatically enhanced galleries. The Museum is currently underway with a \$53 million capital campaign, which includes \$23.6 million of funding from Measure G, supported by the citizens of Oakland.

The \$53 million project comprises several major components:

Item: 5
Life Enrichment Committee
April 24, 2007

1. **The creation of the new California Collections and Research Center**, providing off-site storage and care of the Museum's collections.
2. **Transformation of the Museum's 90,000 square feet of collection galleries.** Through integration of dynamic and flexible interpretive methods, interactive exhibit elements, in-gallery learning centers, and community participation, the Museum will draw deeper connections between its disciplines to tell a new story of the California experience. In addition, the Gallery of California Art will expand with approximately 4,000 square feet of additional gallery space captured from previously little-used outdoor courtyards.
3. **Expansion of educational facilities.** The project will expand and improve our educational facilities – both within and outside the galleries – for students, teachers and families, including a new student entry, new check-in and orientation spaces, and a new multipurpose classroom.
4. **Enhanced visitor amenities.** An improved visitor entrance, covered gathering areas, disabled visitor access, enhanced circulation and visitor facilities will make this landmark cultural institution and urban park a gathering place for the community and a superior destination for museum audiences.

It is important to note that the Oakland Museum of California was an early model of a "green building" and that we are seeking LEED certification for the building renovation.

KEY ISSUES AND IMPACTS

Following are the performance measurements as provided to the Life Enrichment Committee on December 12. We have added more information as requested by the Committee, including specific numbers rather than percentages; information on the Museum's Free Day and composition of student visitors; and further detail on the funds raised by the Oakland Museum of California Foundation.

Measure

1. Amount of private contributions, grants earned, and other revenues. The target for fundraising was \$6,000,000 and the actual funds received in FY 05-06 was \$7,702,942. Of this, \$5,259,448 was raised for operating and program support, and \$2,443,494 were contributions for the *Museum of California Campaign*. Operating and program support received allowed the Museum Foundation to end the fiscal year with total revenue of \$11,864,838.

The *Museum of California Campaign* has a total goal of \$53 million as established by the Oakland Museum of California Foundation in October 2007. As noted above, the campaign is

Item: 5
Life Enrichment Committee
April 24, 2007

supporting the major renovation of the Museum's facility, a complete reinstallation of the collections, enhancement to education spaces and visitor amenities, and the creation of the California Collections and Research Center. To date, the campaign has achieved approximately \$33 million, including \$23.6 million from Measure G, \$2.88 million from the California Cultural and Historic Endowment, and approximately \$6 million in private support from individuals, corporations, and foundations. The Museum is currently in the "quiet phase" of the campaign, intended to raise major gifts from private sources.

2. Museum renovation/design development - percent completed. The 05-06 target was to achieve 60% design development ("DD") and the Museum achieved 72% on the DD phase. More specifically, the Museum is moving actively forward on the building renovation and gallery reinstallation. We anticipate completing the DD phase for architectural building modification by the end of May and to complete DD for the Art and History Galleries by Fall 2007. The Art and History Galleries are slated to close to the public in January 2008 for an 18-month construction and reinstallation process and to re-open to the public in fall 2009, coincident with the Museum's 40th anniversary.

A second phase of the project, to include expansion of education facilities, the move and expansion of the Museum Store, and the reinstallation of the Gallery of Natural Science, will commence later this year and are anticipated to be complete by 2011.

3. California Collections and Research Center design development - percent completed. The 05-06 target was to achieve 55% completion. As of December 31, 2007, the City of Oakland had purchased the building, the \$7 million renovation was complete, and the entire off-site Museum collection -- some 180 truckloads with 80-foot trailers -- was moved from the Oakland Army Base to the facility during a four-month period in fall 2007. The City of Oakland's collection of art, artifacts, and natural science specimens -- one of its most valuable assets -- is now housed in appropriate facilities for long-term care, preservation, and access. Proper storage of the Museum's collection was the most critical issue cited in the American Association of Museum's 1999 accreditation report, and this issue has now been most successfully resolved for the current re-accreditation.
4. Total museum attendance. The target for attendance in 05-06 was 152,000, and this figure was exceeded with a total of 163,757. This increased attendance was largely the result of the success of the *Baseball as America* exhibition in fall/winter 05-06.

Of this number, 8,074 visitors attended the Museum on our Free Second Sunday and the Museum also distributes thousands of free admission vouchers to community organizations, schools, and through the Library's summer reading program.

5. Number of new temporary exhibitions opening at the Museum. The target for exhibitions was 9 and this number was exceeded with 13 temporary exhibitions. While the number

of exhibitions is one way to measure the Museum's programmatic activity, the more important measure is the quality of the exhibitions, their impact on the public, and their contribution to the field in terms of research and scholarship. In 2005-06, the Museum presented major exhibitions including *Baseball as America*; *Bruce Beasley*; *The Art of Seeing*; *Aftershock: Stories of the 1906 Earthquake and Aftermath*; and *Beyond the Magic: 50 Years of Disneyland*, among others.

6. Number of students visiting on school tours. The target for school programs was 55,000 and this number was exceeded with 56,536. Of this, approximately 30% were students from Oakland, including 26% from Oakland Unified School District.

It is important to note that the Museum has established an objective as part of its strategic plan to increase service to Oakland public school children. Staff members are in the process of meeting with school officials, particularly from schools that are not actively participating in Museum programs, to provide information on our school services and to learn the barriers to participation that the Museum may be able to address.

Oakland Unified schools are charged a very modest \$10 per field trip compared to \$50 for private schools or schools outside the district. Demand for Museum field trips is great and each year spaces are reserved for Oakland schools to ensure that all slots are not filled by other schools from throughout the Bay Area. In addition to this broad educational program, the Museum provides a number of more in-depth and specific partnerships with Oakland schools, such as a semester-long program with Oakland High School that brings together an artist to work with students on creating art projects which are then installed at the Museum in an exhibition designed in collaboration with the students.

7. Percentage of visitors surveyed saying services are good or better. In surveys of selected programs and exhibitions, 90% of visitors rated the serves as good or better compared to a target of 80%. We are now developing additional mechanisms for surveying visitor satisfaction including ongoing member and visitor surveys, a comment card system, and specific evaluations as part of the planning for our new galleries.

Proposed Performance Measures for FY 07-09

For the FY 07-09 budgets, the Museum proposes to retain performance measures for completion of the renovation and construction project, capital fundraising effort, visitor satisfaction, total attendance, number of exhibitions, number of school tours. In addition, the Museum will include new performance measures related to the number of volunteer and volunteer hours contributed to supporting programs and operations, and the number of partnerships with community organizations.

5

SUSTAINABLE OPPORTUNITIES

Acceptance of this report provides for no sustainable opportunities at this time.

DISABILITY AND SENIOR CITIZEN ACCESS

Acceptance of this report has no impact for disabled and senior citizen access.

ACTION REQUESTED OF THE CITY COUNCIL

Staff recommends that the City Council accept this supplemental report on Performance Measures for the Oakland Museum of California, Fiscal Year July 2005 through June 2006, and this informational report on the Museum's education and community programs.

Respectfully submitted,



Lori Fogarty
Director, Oakland Museum of California

Prepared by:
Lori Fogarty, Director
Oakland Museum of California

APPROVED AND FORWARDED TO THE
LIFE ENRICHMENT COMMITTEE:



Office of the City Administrator

Item: 5
Life Enrichment Committee
April 24, 2007

Oakland Museum of California

Fulfilling Our Promise: Strategic Plan 2007–2012

Introduction

When the Oakland Museum opened in 1969, it was heralded as a bold new advancement in the development of American museums—a cultural institution situated in an urban park, founded upon democratic principles as a museum for the community, and bringing together multiple disciplines to tell the extraordinary story of California—its environment, history, and creative expression. With more than 100,000 square feet of gallery space on four city blocks, Kevin Roche’s revolutionary building and Dan Kiley’s sublime gardens made it a landmark of museum architecture and one of the major cultural destinations in the Bay Area.

Over the past close to forty years, the Museum has been distinguished by the breadth of its collections, leadership in educational programming, vital community connections, and outstanding exhibitions. And yet, at this critical juncture—not only in the history of the Oakland Museum of California, but for all cultural organizations as they confront the challenges of the twenty-first century—the Museum recognizes that it must again take the kind of bold steps that marked its origins. California’s changing demographics, the proliferation of technology and media, the desire of audiences for personal and customized experiences, and the competition among leisure-time attractions call into question the essential viability of museums and demand an examination of the very way we do business.

For the Oakland Museum of California, the future in many ways inspires a reclaiming of the past. The Museum was fundamentally created as a new model for museums. In the coming years, the Museum will have the singular opportunity to again serve as a new model as we transform our galleries and enhance our landmark building as part of a \$53 million “Campaign for the Museum of California.” As we look to the years ahead, our ambition is to truly fulfill the original promise of the Oakland Museum and to, indeed, become the Museum for the New California.

This strategic plan lays out our course for the next five years—years that will span the planning for our capital project, the closure of galleries during construction, and the re-opening of our transformed collection presentations. While this project will be the focus of much of our activity, it is also critical that all our efforts—from collections stewardship to exhibitions, from audience development to educational programming—support our mission to connect communities to the cultural and environmental heritage of California.

The development of this plan was overseen by a steering committee representing the Museum’s diverse constituency groups: the Board of Trustees of the Oakland Museum of California Foundation, the staff of the Foundation and the City of Oakland, and Museum advisory and volunteer organizations, including guilds, multi-cultural advisory councils, and the Oakland Museum Women’s Board.

Interdepartmental staff task forces worked on the specific goals, objectives, and suggested strategies for each major section of the plan. The plan is intended to be

5

updated regularly and to form the basis for annual planning, including development of annual budgets, Board committee goals, staff performance evaluations, and ongoing communication and coordination with the constituent groups. As we recognize that the forces that are challenging the museum field will continue and, indeed, accelerate in the years ahead, our intent is for this plan to be a dynamic document informed by our ongoing learning.

Approved by the Oakland Museum of California Foundation Board of Trustees
March 22, 2007

5

ENG HM JT CR
APR 24 2007

Mission Statement:

Our mission is to connect communities to the cultural and environmental heritage of California. Through collections, exhibitions, education programs, and public dialogue, we inspire people of all ages and backgrounds to think creatively and critically about the natural, artistic and social forces that characterize our state and influence its relationship to the world.

Governance

Background: The Oakland Museum of California is a public-private partnership between the City of Oakland and the Oakland Museum of California Foundation. The Foundation provides approximately one-half of the organization's funding through support of staff positions, exhibitions, educational programs, marketing and development efforts, visitor services, and acquisitions. Sustaining the institution through a major capital campaign and into the next stage of its development will require outstanding governance and strong collaboration between Board, staff, and other volunteer constituencies

Goal: Attract, develop and retain an outstanding Board of Trustees that supports the Museum's mission, develops and ensures the implementation of strategic policies, and advances the Museum's long-term financial strength and its role as a vital community resource; maintain a strong connection to Oakland elected officials and other City departments to ensure that the Museum plays a vital role in advancing the City's services to its residents.

1. Maintain rigorous nominating, orientation and evaluation processes that ensure the Board remains composed of highly capable leaders who are diverse in their talents, backgrounds and perspectives.
2. Provide for the Museum's financial security through strong personal support, active fundraising, and sound financial management.
3. Foster a healthy partnership among the Board, the Executive Director and Senior Staff in order to advance the mutual understanding, development, and oversight of the Museum's goals and objectives.
4. Strengthen the trust and respect of all constituencies within the Museum community through ongoing, open communication among the various constituency groups, including volunteer organizations and the City of Oakland.
5. In collaboration with Museum staff, develop and communicate to the Museum community the Foundation's annual priorities, based on the *Strategic Plan*.
6. Provide ongoing Board education on Museum issues and critical topics in the museum field.
7. Implement the terms of the Management Operations Agreement between the City and the Foundation that ensure ongoing communication and coordination regarding the Museum's goals, plans, and financial needs.

Facilities

Background: The focus for the Museum's facility enhancement in the next several years will be on capital improvements and building and gallery renovations supported by a \$53 million capital campaign. At the same time, the Museum must address long-standing facility deficiencies that are the result of deferred maintenance and implement critical operational systems to support the facilities and the Museum's public mission.

Goal: Ensure the smooth and efficient operation of facilities in order to stabilize and protect collections and exhibits, guarantee the safety and comfort of visitors and staff, and maintain the Museum's landmark facility in optimal condition.

1. Complete capital improvements for Museum renovation project on schedule and within the allocated budget.
2. Prioritize needs and resolve critical capital improvements through the City of Oakland's capital improvement project process; advocate for enhanced City maintenance of the building.
3. Improve visitor amenities and wayfinding through renovation and ongoing building projects.
4. Improve and integrate building energy management systems, including HVAC and lighting, and ensure that these systems meet required conservation guidelines.
5. Update and provide regular training on a disaster response, management, and recovery plan to ensure the safety of staff, visitors, and collections.
6. Upgrade security controls and building fire alarm and suppression systems throughout the Museum and collection storage facilities.
7. Ensure that all Museum facilities, including collections storage and the conservation lab, are included in operational plans; review and update procedures, maintenance plans, and facility management structure.

Collections

Background: The Oakland Museum of California's collection of more than one million objects and artifacts reflects the distinct collecting philosophies of its three departments and their antecedents in the three museums that formed the Oakland Museum of California. With the recent move of collection storage from the Oakland Army Base to the new California Collections Research Center, the focus for the coming years is on improved collection access, stewardship, and management as well as on the complete reinstallation of collections in the three main galleries.

Goal: Enhance, present, steward, and ensure public access to the collections of Art, History and Natural Sciences in order to support the Museum's educational and public mission.

1. Inspire new and innovative connections between visitors and collection objects and artifacts through dynamic reinstallation of the collections in the Museum's galleries.
2. Build collections around strategic priorities in Art, History and Natural Sciences through acquisitions, gifts, long-term loans, and collaborations.
3. Improve overall Museum collections plans and procedures, including conservation priorities and collection inventories, in order to ensure appropriate stewardship, interpretation, and access.
4. Improve Museum staffing resources and personnel structures in the curatorial, conservation, registration, and preparation functions to support proper collection management and make possible improved collection access for the public.

5. Review existing museum collections management policies and revise to meet best-practice museum standards.
6. Enhance collection documentation and accessibility through technology.

Exhibitions

Background: As with many museums, exhibitions are the most well-known public face of the Oakland Museum of California. Great exhibitions not only draw record-breaking crowds, but they advance the Museum's scholarly endeavors and contribute to the public's knowledge of California art, history, and natural science. As exhibitions become more expensive to organize and as audiences have increasingly higher expectations, the challenge in the coming years will be to develop new models for exhibition development, programming and evaluation.

Goal: Present a dynamic exhibition program that enlightens, engages and inspires our diverse communities; is reflective of our distinctive curatorial expertise in California art, history, and natural sciences; and makes interdisciplinary and global connections to the California experience.

1. Establish processes for exhibition development and evaluation that incorporate representation from various perspectives, ensure accountability for meeting exhibition's goals, and enable continual improvements to exhibition quality and impact.
2. Present a balance of exhibitions over time that reinforce the Museum's mission and positioning and serve its diverse audiences.
3. Create new exhibition models for organizing and presenting special exhibitions that include opportunities for public dialogue and community participation.
4. Create new staffing and financial models to support exhibitions as well as changing elements of the main collection galleries.
5. Develop and present innovative programming in conjunction with exhibitions—both within and outside the galleries—in order to engage new audiences and create public dialogue within exhibitions.

Education and Community Engagement

Background: The Oakland Museum of California is well-known for the range and quality of its educational programs and its exemplary community engagement practices. The opportunity in the coming years, particularly with expanded educational facilities and the innovative presentation of collections, is to further deepen the Museum's involvement with the community and to make the Museum more relevant to California's increasing diverse populations through exhibitions and educational programming.

Goal: Foster creative exploration and stewardship of California's natural resources, social practices, and artistic traditions through programs and exhibitions that inspire

curiosity, open minds, enrich lives, and encourage respect and understanding among people of all ages, backgrounds, and abilities.

1. Strengthen direct community involvement in exhibitions, programs, and off-site activities through community partnerships, staff and volunteer development activities, and ongoing communication with advisory councils and other community representatives.
2. Ensure the relevancy and accessibility of K-12 educational services for students and teachers.
3. Become a destination for intergenerational learning.
4. Provide youth and adult education programs and exhibitions that promote active engagement, lifelong learning, and public dialogue about the California experience.
5. Develop exhibitions and collections-based programs that are relevant and accessible to increasingly diverse audiences and learning styles.
6. Establish and implement an educational media and technology plan.
7. Contribute to the scholarship and resources on California art, history, and ecology and their relationship with the rest of the world.

Audience Development

Background: A major goal of the Museum's capital project is to make the institution more engaging, accessible, and relevant to diverse audiences in order to increase attendance and expand earned revenue. In order to achieve this goal, audience development efforts must be fully integrated throughout the institution to establish a clear identity for the Oakland Museum of California, link community engagement and marketing efforts, and ensure an outstanding visitor experience that encourages repeat visitation.

Goal: Increase attendance and community engagement through a focus on local and regional audiences, particularly families and ethnically diverse visitors, with efforts that unify programming, community partnerships, and marketing efforts in support of the Museum's brand position.

1. Establish new Museum brand as part of institutional transformation that will ensure a clear identity for the Oakland Museum of California in the marketplace and will provide clear and cohesive communication with new and existing audiences.
2. Encourage frequent repeat attendance through excellent on-site visitor experience.
3. Create an annual audience development plan and strategy that links to the annual exhibition and program calendar.
4. Increase audiences from targeted Oakland neighborhoods, as well as in Alameda and Contra Costa Counties.
5. Establish ongoing program of audience research to ensure that visitor feedback and audience development goals are incorporated into exhibition and program planning.

6. Establish and implement a technology plan that aligns with educational technologies, enables communication with new audiences, and ensures ongoing, customized, and timely communication with existing audiences.
7. Collaborate with targeted organizations with common interests to build awareness for the Museum, broaden and diversify audiences, and share resources.

Human Resources

Background: The Museum's staff comprises approximately one-half City of Oakland employees and one-half OMCA Foundation employees. The challenge in this environment is to ensure a unified purpose, equitable treatment, cohesive communication, and shared opportunities for growth.

Goal: Recruit, develop and retain an outstanding and diverse staff and volunteer corps who are dedicated to the Museum's mission, uphold the highest professional standards, and foster a culture of creativity, excellence, and respect.

1. Align City of Oakland and OMCA Foundation human resource policies to ensure as much equity as possible in recruiting and hiring, compensation, benefits, performance evaluations, and personnel policies.
2. Enhance professional development opportunities through both formal mechanisms, such as conferences and City training courses, as well as through informal vehicles for dialogue and learning.
3. Ensure adherence to the Museum's "Diversity Vision" through proactive recruitment and hiring practices and through ongoing diversity training of the staff and volunteers.
4. Improve institution-wide employee and volunteer communications through examination and enhancement of existing meeting structures and implementation of new communication mechanisms.
5. Coordinate the Museum's various departmental technology initiatives through an institution-wide technology plan and attendant training.

Financial Sustainability

Background: The period of 2007-2012 will be a time of great transition and growth for the Museum during its construction project and capital campaign. While conservative financial management will be critical in this context of unpredictability, the opening of new facilities and the momentum of the capital campaign also makes possible opportunities for significant expansion of earned and contributed revenue.

Goal: Provide for the Museum's financial health and sound management through maximizing earned and contributed revenue, matching resources to strategic goals, and supplying timely and accurate financial information, thereby advancing the Museum's mission and goals.

1. Refine and establish processes for budget development, multi-year financial forecasting, and benchmarking against key metrics in order to ensure efficiency and transparency in Museum financial operations.
2. Present financial information on a timely basis to all interested groups, including staff, Board of Trustees, City Council, and volunteer guilds.
3. Operate a balanced Foundation budget through conservative budgeting and expense management, and advocate for the maintenance of City funding at the existing level of service through demonstration of the alignment between the Museum and the City's goals.
4. Build earned revenue capacity through increased attendance and attendance-based revenue streams, including the Museum store and café.
5. Maximize revenue capacity of other enterprises' activities, including Professional Services and Facility Rental, and utilize these programs to increase awareness and support of the Museum.
6. Complete the \$53 million Museum of California Campaign, and leverage the campaign to expand the Museum's endowment through planned giving.
7. Increase contributed income by at least 5% each year through initiatives in annual, special project, and planned giving that build upon the momentum of the capital campaign.
8. Develop longer-term development strategies that build institutional capacity, support complex multi-year projects, and secure the Museum's future through planned and endowment giving.

5

UNIVERSITY OF CALIFORNIA
APR 24 2007