



STAFF REPORT
Community Programming & Outreach Services

Title: Final Museum & Collections Strategy
Report Number: COM2015-025
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Collections & Beth Rajnovich, Policy & Performance Analyst
Meeting Type: Finance & Strategic Planning Committee Meeting
Council/Committee Date: October 26, 2015
File: N/A
Attachments: Museum and Collections Strategy, Appendix A

Ward No.: All Wards

Recommendation:

1. That COM2015-025 be approved.
2. That the Museum & Collections Strategy attached as Appendix A to report COM2015-025 be approved by Council in principle.
3. That Council direct staff to fully implement the recommendations in the strategy as resources allow, and report back to Council as needed.

A. Executive Summary

This report provides Council and the community with a proposed final Museum & Collections Strategy. The proposed final Museum & Collections Strategy contains Vision and Mission Statements, 5 goals, and 20 recommendations to achieve the vision and goals. The proposed final Museum & Collections Strategy is built on the public engagement that has taken place to date, which has garnered feedback from over 350 individuals/groups, alongside research on successful community museums in other municipalities.

The final Museum & Collections Strategy is intended to serve as a foundation for the upcoming three-year budget deliberations, and Department/Division business plans. The final Museum & Collections Strategy will be implemented over a 10-year period.

B. Financial Implications

The strategy implementation plan outlines 20 recommendations, with a timeframe for implementation of short term, medium term, or long term identified for each. Of the 11 recommendations identified for implementation in the short term, many can be implemented within existing budgets. In addition staff will be including a request for \$30,000 in additional operational funding to implement the strategy, which will be brought forward for Council's consideration during the 2016-2018 budget deliberations.

One time project funding would be required for the recommendations identified over the medium and longer term. The Heritage Reserve has been identified as a potential funding source for these recommendations, as the Heritage Reserve expenditure policy includes capital costs related to program delivery for the City of Waterloo's museum. The museum portion of the Heritage Reserve currently has a balance of \$305,000. For many of these recommendations further planning & analysis will be required, once the scope of the work to be undertaken is known, in order to determine the financial impact. Where estimates have been provided, the impact would be approximately \$100,000, however these estimates are also subject to further detailed review.

C. Technology Implications

Not applicable.

D. Legal Considerations

Staff did not seek legal advice.

E. Link to Strategic Plan

(Strategic Priorities: Multi-modal Transportation, Infrastructure Renewal, Strong Community, Environmental Leadership, Corporate Excellence, Economic Development)

This strategy establishes links to the 2015-2018 Council Strategic Plan.

Strong Community - This strategy supports a strong community by identifying the future role of the City of Waterloo Museum and its collection in enhancing the community. It also considers opportunities for growth of the City of Waterloo Museum, and looks at new innovative models of collaboration with other community organizations to enable growth and sustainability.

Economic Development - This strategy supports economic development because the a high quality museum can contribute to creating a strong sense of place, as well as to a higher quality of life and a more vibrant social and cultural scene. As a result, greater numbers of talented and creative people may wish to live in Waterloo, and more knowledge-economy firms may relocate to benefit from the creative environment.

F. Previous Reports on this Topic

COM2015-21 Museum & Collections Draft Recommendations

COM2015-12 Museum & Collections Situational Analysis

COM2014-10 Cultural Heritage Strategy

RFP14-19 Consulting Services for Museum & Collections Strategy.

CAO2013-12 Waterloo's Culture Plan
CCRS2012-012 Train Station Proceeds

G. Approvals

Name	Signature	Date
Author: Karen VandenBrink	<i>K VandenBrink</i>	October 8, 2015
Author: Beth Rajnovich	<i>B. Rajnovich</i>	October 8, 2015
Director: Jim Bowman		
Commissioner: Acting Steve Heldman		
Finance: Keshwer Patel		

CAO



Final Museum & Collections Strategy COM2015-025

Background

To continue to build on the City of Waterloo Museum's success and to ensure museum sustainability, the development of a long-term strategy for the museum and its collection was recommended in the Culture Plan.

The Museum and Collection Strategy explores opportunities in areas such as collections management, programming, future storage needs, and examines the sustainability of the Conestoga Mall partnership. It also considers opportunities for growth of the City of Waterloo Museum, and looks at new innovative models of collaboration with other community organizations to enable growth and sustainability.

Consultation Efforts

The development of this strategy involved research and significant consultation. Staff report COM2015-12 Museum & Collections Situational Analysis identified efforts to engage the public and community, key stakeholders, academic and culture communities via interviews, workshop meetings, and online surveys.

To inform completion of the proposed final Vision, Mission, Goals and recommendations found in the Museum and Collections Strategy (Appendix A), the following engagement efforts took place since August 17, 2015.

- Online feedback from residents via the City's Open City Hall platform
- Email seeking feedback from key stakeholder interviewees and other community stakeholders
- Council input received from COM2015-12 Situation Analysis and COM2015-21 Draft Recommendations
- Online staff survey

Comments received were reviewed and incorporated, as appropriate, into the proposed final Museum & Collections Strategy found in Appendix A.

The draft Museum & Collections strategy was developed by TCI Management Consultants, (Jon Linton, director) who specialize in strategic planning for museums and other cultural institutions.

TCI teamed up with Reich + Petch, museum architects, and Maltby & Associates Inc., experts in museum collections, to undertake the project.

The staff project team was made up of staff in the Community Serves Department's Business Services unit who are responsible for planning and policy development as well as Museum & Archival Collections unit staff, under the guidance of the Director of Community Programs and Outreach.

On August 10, 2015, Council received report COM2015-21 which included a Draft Museum & Collections Strategy and Situational Analysis. This document summarized all of the consultation and research completed to date. The Situational Analysis has not been included in this report as it has not changed since first presented to Council.

Final Strategy at-a-glance

This section provides excerpts from Appendix A regarding Vision, Mission and Strategic Priority Areas. See Appendix A for complete details.

Vision

The City of Waterloo Museum is a vibrant heritage portal where residents and visitors personally connect with Waterloo's past, building shared experiences and enhancing culture in our community.

Mission

The City of Waterloo Museum serves as a community gathering place where residents and visitors celebrate their stories, both local and global, which are unique to the City's growth and evolution. Through its collections, exhibitions, volunteers, staff and programs, the Museum interprets the fabric of our past and points the way to its future.

Goals

1. To tell the unique and compelling stories of the growth and evolution of the City of Waterloo.
2. To follow a collections plan that reinforces and reflects the stories identified.
3. To ensure broad community awareness of the value of the museum and its contribution to a unique City brand.
4. To ensure that the museum operation is easily accessible to the public.
5. To ensure proper compliance and accountability in all museum operations.

Next Steps

Should Council approve the proposed final Museum & Collections Strategy, staff will begin to promote the completion of the Strategy, and key next steps include:

- Should Council approve the proposed final Museum & Collections Strategy, staff will begin to implement the Strategy.

- This will include using the Museum & Collections Strategy to inform budget deliberations and business planning for the Museum.
- Resourcing through the budget process, as well as ability to acquire grants and access other resources, will influence the ability to implement the strategy.
- The Community Programming & Outreach Services/Museum & Collections unit will regularly report to Council on the implementation.

Appendix A
To COM2015-025

Museum and Collections Strategy



Museum and Collections Strategy

October 7, 2015

TCI Management Consultants

in association with

Reich + Petch Design International and
Maltby & Associates Inc.

City of Waterloo Museum Organization Review and Strategic Plan Table of Contents

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STRATEGY AT A GLANCE

Vision The City of Waterloo Museum is a vibrant heritage portal where residents and visitors personally connect with Waterloo’s past, building shared experiences and enhancing culture in our community.

Mission

The City of Waterloo Museum serves as a community gathering place where residents and visitors celebrate stories, both local and global, which are unique to the City’s growth and evolution. Through its collections, exhibitions, programs, volunteers and staff, the Museum interprets the fabric of our past and points the way to our future.



Goals

1. To tell the unique and compelling stories of the growth and evolution of the City of Waterloo.
2. To follow a collections plan that reinforces and reflects the stories identified.
3. To ensure broad community awareness of the value of the museum and its contribution to a unique City brand.
4. To ensure that the museum operation is easily accessible to the public.
5. To ensure proper compliance and accountability in all museum operations.

Recommendations

Short Term (1-2 years)	Medium Term (3-5 years)	Long Term (5+ years)
<ol style="list-style-type: none"> 1. Update the Collections Plan 2. Undertake an audit of the collections database 3. Transfer responsibility for the fine art collection to the museum 4. Identify appropriate offsite storage options for current collection overflow 5. Develop a plan for exhibition content at the former Seagram Museum (CIGI owned building) 6. Improved way finding signage 7. Expand hours of operation 8. Explore greater orientation to in-mall markets 9. Complete development of the ten standards for Community Museums in Ontario 10. Continue to build new strategic partnerships 11. Resolve branding confusion 	<ol style="list-style-type: none"> 12. Develop a marketing strategy 13. Develop dedicated web site and related social media materials 14. Consider expansion of the museum’s mandate to include relevant archival materials that support historical research about the city and its residents 15. Develop greater orientation to programming and education 	<ol style="list-style-type: none"> 16. Address need for expanded and consolidation of collections storage space 17. Address need for more exhibition space 18. Address the need for dedicated programming space 19. Undertake feasibility study for a new facility 20. Consider the role for a ‘Friends of the Museum’ Group to provide support and guidance on the future of the museum



1. Introduction

In 2009, the City of Waterloo’s heritage artifacts collection was moved from its temporary location at the Canadian Clay & Glass Gallery to its new home at Conestoga Mall, creating Waterloo’s first civic museum. The opening of the City of Waterloo Museum began an exciting chapter in the cultural development of the city, providing a home for the preservation and exhibition of Waterloo’s community history. (Prior to the Museum, the collection was kept at the Canadian Clay & Glass Gallery, with an annual opportunity to display it with themed exhibitions.)

The City of Waterloo Museum’s unique collection features artifacts that relate to the Seagram family and their role in the early industrial development of Waterloo through the Seagram Distillery and Canada Barrels and Kegs (Canbar). Artifacts in this collection also provide insight into the daily work of former employees of the Seagram plant, highlighting the four key working areas of the distillery: production, maturation and warehousing, bottling, and administration.



Along with the Seagram collection, the collection has a number of significant special collections, including historic glassware, ceramic vessels, scientific instruments and technological equipment used in the production, storage and service of alcohol.

The City of Waterloo Museum is also home to municipal history artifacts including: mayoral portraits, sports memorabilia, souvenir ware, archival documents, fine art, and artifacts from the Martin Farmstead, a Mennonite home located in RIM Park.

The partnership with Conestoga Mall is seen as an innovative model to providing space for a community museum. This arrangement has enabled the city to operate a cultural facility, with a minimal budget, that provides a broad on-site audience for the museum. In 2014, close to 6,000 people visited the museum, indicating success as well as interest in the city’s heritage.

While there are other museums in the area, such as the Waterloo Region Museum, residents appreciate the distinctive Waterloo-based collection. Through the development of the City’s culture plan, residents indicated they would like to see the museum extend its hours of operation, promote exhibits more; and offer opportunities for expanded programming.



To continue to build on the museum’s success and to ensure museum sustainability to share the city’s heritage collection, a long-term strategy for the museum and its collection was identified in the Culture Plan as critical for continued growth and success.

In response, this strategy was developed to identify the future role of the City of Waterloo Museum and its collection. It explores opportunities in areas such as collections management, programming, future storage needs, and examines the sustainability of the Conestoga Mall partnership. It also considers opportunities for growth of the City of Waterloo Museum, and looks at new innovative models of collaboration with other community organizations to enable growth and sustainability.

1.1 Purpose

The overall purpose of the Museum and Collections Strategy is to:

1. Guide long term planning for the city’s museum and collections, including programming opportunities.
2. Capitalize on the city’s existing strengths in its museum and collections, and built heritage assets.
3. Address potential gaps and/or weaknesses in the city’s cultural heritage.
4. Assist council and staff decision making with developing operating and capital budget strategies and business planning for creating additional community interest and support for heritage.
5. Identify to the public the importance and value that the city places on our heritage assets and to promote these assets.
6. Encourage and provide opportunities for local residents to become more engaged in their own community and for tourists to be drawn to the area.
7. Contribute to Waterloo’s prosperity and quality of life.
8. Contribute to the achievement of the 2015-2018 Strategic Plan Vision for the City of Waterloo.

1.2. Guiding Principles

To provide a framework for the development of the strategy, the following guiding principles were identified:

1. The City of Waterloo’s powerful historical narrative is a unique offering.
2. The City of Waterloo’s cultural heritage assets can contribute to a more livable, creative and inclusive community.



3. Waterloo's cultural heritage assets have a direct and indirect positive impact on the city's economic vitality.
4. Alignment between the City's Museum and Collections Strategy, the Built Heritage Strategy and the Culture Plan is required to successfully achieve the community's goals for culture and heritage.

1.3 Purposes and Functions of a Community Museum

Museums are institutions that care for (conserve) a collection of artifacts and other objects of artistic, cultural, historical, or scientific importance and makes them available for public viewing through exhibits that may be permanent or temporary¹. At the outset of this strategy, it is important to distinguish a 'community' museum from a special interest museum – such as one devoted to art, dinosaurs, shoes, etc. The distinction is that community museums tell the human history of how a particular community or region came to be: the integrated story of how the community started, grew, developed and evolved over time. And possibly what might lie in its future.

The purpose of community museums is to provide residents, as well as visitors, some context in terms of the environment and society that they are immersed in. Accordingly, community museums attempt to explain the physical environment of the community; its economic base; the built history and heritage of streets and buildings; the social traditions and customs of the community; the community's role in history – how it influenced and was influenced by national and world events; and the story of key individuals who have helped shape the life of the area. Successful community museums do this in a compelling and memorable way.

Secondarily, successful community museums can have the additional benefits of acting as 'economic engines' in their communities. This occurs by attracting visitors as well as being visible demonstrations of community pride and quality of life that can attract potential new residents and investors into the community².

When a museum contributes to creating a strong sense of place, it also contributes to a higher quality of life and a more vibrant social and cultural scene. More talented and creative people may wish to live in the vicinity, and more knowledge-economy firms may relocate there to benefit from the creative environment.

¹ Edward Porter Alexander, Mary Alexander; (September 2007). *Museums in motion: an introduction to the history and functions of museums*. Rowman & Littlefield, 2008.

² See [American Alliance for Museums](#), section "*Museums as Economic Engines*"



A visible museum nurtures the collective imagination such that people are likely to associate a prominent museum with the impression they have of the entire city. There may also be an element of pride and prestige in this city-museum relationship. Residents can have an almost patriotic feeling towards their museums, especially if these play a decisive role in the community.³

Museum planning experts define ‘successful’ vs. ‘not successful’ community museums along a spectrum of dimensions which are summarized overleaf:

Dimension	Characteristics of ‘Successful’ Community Museums	Characteristics of ‘Unsuccessful’ Community Museums
Storytelling	<ul style="list-style-type: none"> • they tell stories and narratives about the community 	<ul style="list-style-type: none"> • they just show objects
Uniqueness	<ul style="list-style-type: none"> • they portray unique or particular aspects of the community that are different from anywhere else, and that may relate to a common theme or identity 	<ul style="list-style-type: none"> • they show essentially the ‘same as can be seen everywhere else’
Experience	<ul style="list-style-type: none"> • they provide a memorable, and often multi-dimensional, experience 	<ul style="list-style-type: none"> • the experience is uniform throughout the museum and not particularly memorable
Risk-Taking	<ul style="list-style-type: none"> • they take occasional risks in engaging the community and challenging the audience (which may engage the community in a discussion of the role and relevance of a museum in society) 	<ul style="list-style-type: none"> • they play it safe
Community Building	<ul style="list-style-type: none"> • by giving citizens a better sense of their history, values and community, they help to promote pride in the community, engagement and a better sense of being connected to and a value contributor to the local community 	<ul style="list-style-type: none"> • because stories and artifacts are fragmented, community members may not feel attached to their history or a sense of belonging

³ Gail Dexter Lord, Ngaire Blankenberg; (2015). *Cities, Museums and Soft Power*. The AAM Press, (2015).



Dimension	Characteristics of 'Successful' Community Museums	Characteristics of 'Unsuccessful' Community Museums
Economic Development	<ul style="list-style-type: none"> • are seen to be expressions of community pride and quality of life • reinforce the identity and 'brand' of the municipality 	<ul style="list-style-type: none"> • are disconnected from the community itself; not seen to be actively endorsed by the municipality

Another perspective on what constitutes a 'successful' community museum is the list of '10 reasons to visit a museum', published on the web site *'Know Your Own Bone – a resource for creative engagement in museums and cultural centres'*.⁴ These are:

1. museums make you feel good
2. museums make you smarter
3. museum provide an effective way of learning
4. museums are community centres
5. museum inspire
6. museums help bring change and development to communities
7. museums are a great way to spend time with friends and family
8. a museum may be your next community endeavor or business partner
9. museums may be free sometimes but they all need your support to keep the doors open
10. there is a museum close to you

'Successful' community museums would embrace all of these dimensions.

In developing this strategic plan, the aspiration of positioning the City of Waterloo Museum so that it is a 'successful' community museum has been foremost in the planning.

In addition, the Province of Ontario, through the Ministry of Tourism, Culture and Sport, maintains standards for community museums that are considered as key benchmarks governing the governance, management and operation of museums including conservation of artifacts.⁵ Like the above, these standards outline what is considered a 'successful' community museum.

⁴ See: [10 Reasons to Visit a Museum](#)

⁵ The 10 standards represent the minimum requirements for the operation of a good community museum. Regardless of a museum's size or scope, whether it is in a new building or a heritage structure, or whether it is a seasonal or year-round operation, there are certain functions, responsibilities, and activities common to all. These are the areas highlighted by the standards. To assist museums in meeting the revised standards, the Ontario Ministry of Tourism, Culture and Sports provides advisory services, resource materials and museological information pertinent to the standards. Museum standards must continue to evolve as museums find new ways to serve their communities and fulfill their mandate. In due course, revision of this edition of standards will be necessary to reflect these changes. The province has a fundamental commitment to the preservation and presentation of the material culture of Ontario, through the community museums of the province. In achieving these new standards, Ontario's museums will continue along the path to excellence and remain an asset to the communities they serve.



These standards specifically apply to museum management and technical operations. These do not speak to successful community museums from the perspective of stories and content. This strategy aims to provide additional direction in this regard, based on public consultation findings.

1.4 Description of Current Operations

To understand where the City of Waterloo's Museum can go in the future, an understanding of its current operations is needed.

Key metrics relating to the museum's current operations are:

- operating expenditures of \$244,000 (in 2014) of which 98% comes from the municipality; the general operating costs such as exhibition development and maintaining the collection amount to \$39,000
- 3 full-time staff positions are in place as of March 2015 (previous to this there was one full-time position and two part-time positions)
- the total size of the facility at Conestoga Mall is 4,000 sq. ft., of which 1,500 sq. ft. is exhibit area – additional off-site storage facilities are maintained
- the museum attracts approximately 6,000 visitors per year
- the collection consists of some 10,000 artifacts (The majority of which relate to the history of the Seagram enterprise and the distilling industry. The City of Waterloo acquired this collection to ensure this significant piece of Waterloo's past remained in the public domain thereby enriching the community's ability to understand the local cultural context.

1.5 Developing the Strategy - Activities Undertaken

In developing this strategy, four areas of focus were outlined. These were:

1. a review and analysis of museum operations;
2. an assessment of existing tools and approaches for museum management;
3. a needs analysis and analysis of strengths, weaknesses, opportunities and threats; and
4. development of strategic recommendations and setting priorities for action.

The specific activities undertaken to inform the strategy included:

- site visits to the museum, Elam Martin Farmstead, and the collection storage areas by the project consultants;
- consultation with key stakeholders: museum staff, other municipal staff, council members, and others in the heritage, academic and culture communities;



- review of background documents and policies of the city that are relevant to the museum operation;
- benchmarking of other community museums to identify key performance metrics and best practices in terms of community engagement;
- a community survey (which received over 300 responses);
- a 'museum workshop day' (February 18, 2015) consisting of two focus group sessions;
- preparation of a Situation Analysis report and presentation to Council on April 20, 2015 (COM2015-12);
- preparation of this Draft Museum and Collections Strategy;
- presentation of the draft strategy to Council on August 10, 2015 (COM2015-21)
- second community survey to allow an opportunity for resident feedback on the draft strategy
- development of the final strategy and presentation to Council on October 26, 2015

1.6 Context and Assumptions

To ensure the strategy was developed considering the broader context of operations, several influencing factors and assumptions were identified. These should be kept in mind when reviewing the strategy. These are:

- **Rich historical/museum offering provided by the Region of Waterloo:** Unlike many other communities in Ontario, the City of Waterloo operates in a unique cultural environment where the upper-tier level of government (Region of Waterloo) offers a wide range of historical and cultural services to the larger community. The Region of Waterloo operates the Waterloo Region Museum, Doon Heritage Crossroads, Joseph Schneider Haus, and McDougall Cottage to portray various aspects of the history and culture of the Region. No other upper tier or single tier government in Ontario offers as complex a 'museum offering' to its community. It should be noted that none of these regional facilities are actually located in the City of Waterloo, and none tell exclusively the story of the City of Waterloo.

In addition to the sites operated by the Region of Waterloo, the Region, along with the City of Kitchener and City of Waterloo, provide funding to THEMUSEUM located in Kitchener. It should be noted, however, that despite its branding, THEMUSEUM does not fit the conventional definition of a heritage museum: the collection, stewardship, conservation, preservation, interpretation and exhibition of physical artifacts of historical or other significance to its jurisdiction or stakeholders. Rather, THEMUSEUM primarily presents exhibitions that are curated or produced by other galleries, museums, science centres, institutes or private entities, and these exhibitions do not necessarily



tell the stories of Waterloo Region.

- **Rich history of innovation in the City of Waterloo:** Waterloo has a rich history of innovation and being on the leading edge of technological development: from its industrial beginnings, the impact of the Seagram family and the distilling industry along with the insurance industry; to the development of the post-secondary institutions (largest in Canada in terms of the ratio of student to resident population); the story of research, science and technology (exemplified by BlackBerry, the Perimeter Institute, etc.) – even the location of the museum in Conestoga Mall is something of an innovation. In 2007, the City of Waterloo was recognized as the Top Intelligent Community worldwide. This unique positioning of the city is something that the City of Waterloo Museum should reflect and reinforce, as existing and potential new citizens increasingly expect the city to exemplify this positioning.
- **Tradition of community collaboration and co-operation:** Another rich tradition that characterizes the city and the surrounding region is that of co-operation and collaboration. Exemplified by the tradition of ‘barn-raising’, this spirit lives on to the present time in the form of community cooperation on a wide range of fronts. The museum’s partnership effort with a number of community organizations is further evidence of this contextual element.
- **City support for the museum function:** The City of Waterloo clearly supports its community museum function. Recently, the city’s museum unit was augmented by moving two part-time positions into full-time ones, in part recognizing the positive impact that the museum is having upon the community. The City’s Culture Plan clearly recognized and endorsed the importance of the community museum to the cultural life and vitality of the community.
- **Greater accessibility through the LRT:** The light-rail transit (LRT) development for the Region of Waterloo will make the Conestoga Mall location even more accessible, as one of the stops in the new system will be located at the mall (albeit at the far end of the mall from the museum location). Note that the Conestoga Mall location will be the northern hub of the LRT, and thus a nodal concentration point. As well, for those proponents of an eventual location for the museum in the uptown area (discussed later in this strategy), the LRT will have multiple stops serving this location. Either way, the LRT will bring greater connectivity to the entire region, which should be factored into the short and long-term visioning for a museum location.



- **Simultaneous development of Built Heritage Strategy:** Simultaneously with the development of this Museum and Collections Strategy, the City is preparing a Built Heritage Strategy, which will provide a long-term plan for the conservation and management of the city's built heritage resources. These two strategies working collaboratively will provide staff and council direction to managing our city's heritage resources.
- **City of Waterloo 2015-2018 Strategic Plan:** The City of Waterloo has recently approved an overarching strategic plan. This plan can provide further reinforcement (in addition to the already-approved Culture Plan) for the important and strategic role of the museum in building a strong community and supporting economic development.
- **Positive nature of the input received over the course of this review:** It is important to note that when undertaking a project involving public consultation, the input received is generally polarized, either from those who are strong advocates or adversaries of the institution, organization or issue being reviewed. In the case of a museum, generally the input received is positive and supportive, as the institution is perceived to be a positive and beneficial influence in the community. It should be noted that in this project, the degree of positive support from those aware of the museum was higher than we expected, even given this 'positive bias', indicating a particularly high regard for the City of Waterloo Museum function.

2. Strategic Framework: Vision, Mission, and Goals

For this project a Vision, Mission and Goals for the City of Waterloo Museum was developed. These, in turn, drive the strategic recommendations contained in this plan.

There were five major themes emerging from the Situation Analysis report that influenced the Vision, Mission and Goals that follow. These are:

1. **Telling a more complete story:** The museum should be the place where the 'integrated' story of the growth, development and evolution of the city is told. Beyond just the history of the Seagram operation, which is what the current collection largely represents, the museum should tell stories that represent a more complete history of the city, and the interplay of development between Waterloo and Kitchener, and the rest of the Region. This is a story unique to Waterloo, and that should be told from a Waterloo (not a Regional) viewpoint.



2. **The themes of innovation, entrepreneurship, and collaboration:** While there are a number of possible story-lines and narratives that emerged through the consultation process as being desirable for the museum, there was one point of consensus in terms of ‘meta-themes’ that underlay most of them. These were the linked themes of ‘innovation’, ‘entrepreneurship’ and ‘collaboration’. Innovation and entrepreneurship is present in many of the stories of the city - from the establishment of Seagram’s, to the founding of the Universities, the development of the BlackBerry, the work of the Perimeter Institute – all of these and many other stories of the city reflect the ‘innovation’ and ‘entrepreneurship’ theme. Closely related to this is the idea of collaboration, building on the Mennonite barn-building traditions of the area and many other collaborative ventures. The foundational idea of innovation and entrepreneurship, followed by collaboration, to create new institutions and industries, is “what Waterloo is” and should be reflected in the museum’s exhibitions and programs.
3. **Being future-oriented as well as celebrating the past:** Another key idea emerging from the consultation process was that the museum should look ahead to the future of the city as well as interpret its past. This dual focus on what lies ahead for the city given where it has come from and where it is today (*‘the trajectory of our future informed by our past’* as one respondent put it) is a perspective that would inform all or most of the programs and exhibitions at the museum. In many respects, it would answer the ‘so what?’ question that is posed by most museum exhibitions. (Note that this perspective by itself could be another example of the ‘innovation, entrepreneurship and collaboration’ themes identified above.)
4. **Being a community hub:** The consultation process also validated the ideal that the museum should be a community hub, bringing residents of, and well as visitors to, the city together for a variety of activities. This idea holds regardless of where the museum would be located. At its current home in the Conestoga Mall, it was felt that there was significant potential to increase utilization through improved signage, adjusted hours of operation and the development of programs and exhibits that reflected to a greater degree the themes mentioned above. In the longer term, were the museum to become part of a larger community cultural complex somewhere else in the city, the potential for its operation to be even more of a central gathering place would be even greater.
5. **Being part of a cultural complex:** A strong longer-term vision for the museum was that it would be relocated in a more central area of the city, as part of a larger cultural complex. Many favoured an UpTown location, which would be more reflective of the overall history of the Waterloo, as this was where most of the oldest businesses and commercial establishments were located. This, however, is a longer-term ideal and in no way precludes the museum from pursuing the other points of vision as stated above.



2.1 Vision and Mission

Given the five themes articulated above, a Vision and Mission for the City of Waterloo Museum has been developed. In terms of differentiating between the two, the Vision Statement expresses a desired future state for the museum, once the strategy developed here has unfolded. (One way to think of this is that it will describe the museum as it will be in (say) 5+ years' time, once the various initiatives outlined in this plan have come to fruition.) The Mission Statement, on the other hand, describes the core purpose and focus of the organization which normally remains unchanged over time.

The Vision Statement for the City of Waterloo Museum is:

VISION: The City of Waterloo Museum is a vibrant heritage portal where residents and visitors personally connect with Waterloo's past, building shared experiences and enhancing culture in our community.

Similarly, the Mission Statement which guides the activities of the museum on a daily basis is:

MISSION: The City of Waterloo Museum serves as a community gathering place where residents and visitors celebrate stories, both local and global, which are unique to the City's growth and evolution. Through its collections, exhibitions, programs, volunteers and staff, the Museum interprets the fabric of our past and points the way to our future.

The Vision and Mission Statements ultimately outline several of the dimensions of the desired current operation and future state of the Museum, as expressed through the consultation process. Note as well that they are in some sense 'location-independent' – that is, they could equally describe a small-scale operation located at Conestoga Mall, just as they could a larger operation located somewhere else. (Of course, a larger facility in a different location might enable the Vision to be achieved to a much greater degree than the existing location.)

2.2 Goals

The Vision and Mission developed above in turn generates several goals (broad statements of general intent) and objectives (more specific deliverables that can include projects, processes, target accomplishments, etc.).



The five goals for the Museum and Collections Strategy are:

1. To tell the unique and compelling stories of the growth and evolution of the city.
2. To have a Collections Plan that reinforces and reflects the stories identified.
3. To ensure broad community awareness of the value of the museum and its offering.
4. To ensure that the museum operation is easily accessible to the public.
5. To ensure proper compliance and accountability in all museum operations.

The strategic recommendations that follow speak to tactics and actions that will help achieve these goals.

3. Strategic Recommendations

3.1 Intent Underlying Recommendations

Drawing from the consultation with the community, there are several key intentions underlying the recommendations made here. These are:

- **The importance of a long-term vision for the museum to support success:** Waterloo is a unique community for at least three reasons: 1) its unique demographic of highly educated, creative and curious residents; 2) its large annual influx of students and new Canadians keen to learn about their new home; and 3) the number of compelling stories of innovation, entrepreneurship and community-building that are characteristic of the city. A city such as this needs a proper museum to tell these stories and serve these audiences. The current museum facility at Conestoga Mall is inadequate for the needs of the community in this regard. A reinvented vision for a larger and more complex City of Waterloo Museum is required. A starting point for this process should be the vision and mission as described in the previous section.
- **Need for a central location:** To fully achieve the vision, in the longer-term, the museum will need to expand beyond its current space and facilities in order to properly accommodate and exhibit collections that relate more completely to the integrated history and future possibilities of the City of Waterloo. Practically, this expansion could not occur at the museum's current site in Conestoga Mall. A central location, close to (or possibly co-located with) other cultural service sector facilities, and near to the LRT is preferable.
- **Continuing short-term use of Conestoga Mall location:** The City of Waterloo has a very attractive arrangement with Ivanhoe Cambridge Real Estate (owners of Conestoga Mall)



that provides low cost access to space for public cultural programming purposes⁶. The space has several additional compelling advantages including free parking, public accessibility (with the LRT), proximity of food services, and a 'built-in' audience of mall patrons (according to the mall's website it generates 6 million visits each year). Until the parameters of the longer-term vision are worked out in detail, the City should continue to use this space for museum purposes. Even after a longer-term plan is developed, the City could continue to utilize this space for cultural programming as a possible satellite location for other cultural/community programming.

- **Short-term and a longer-term timeframe for planning:** Given the above, this strategy should adopt both a short-term and long-term focus. The short-term strategy will focus upon ways and means to optimize the current operation at the current location, while the longer term vision should be to examine opportunities to create cultural capital with the vision of expanding the museum's operation, with sufficient exhibit, program, storage and conservation space to satisfy long-term needs.
- **Consider non-heritage programming options for the Elam Martin Farmstead:** At the moment, while there has been some push to see the farmstead programmed as heritage site, it is unclear what the museum's responsibility might be regarding developing programming for the Martin Farmstead. There is some risk, however, that as it is seen to be an 'historical asset' there will be an expectation that the museum function take over responsibility for its operation. However, the site's lack of particular unique relevance for historical or museum purposes, and the cost of bringing it up to a point where it is safe and useable for public purposes, it is recommended consideration of the site for heritage programming telling the Mennonite story be reconsidered.

There are several other examples of Mennonite history in the area, including Brubacher House on the University of Waterloo campus; the Steckle Heritage Farm in Kitchener; the Visitor Centre in St. Jacobs (where the 'Mennonite Story' can be experienced); and living history sites Joseph Schneider Haus in Kitchener and Doon Heritage Crossroads in Kitchener. These are all established attractions that tell various aspects of the Mennonite story in the region and arguably feature better examples of that culture's buildings and traditions than at the Elam Martin Farmstead.

Alternatively, the Farmstead should be considered an important municipal built asset and thought should be given to other ways in which the site could be used to meet community needs, while conserving some of the heritage features of the site.

⁶ The City pays only the utilities costs.



3.2 Short-Term Recommendations (1-2 Year Timeframe)

Part of the logic underpinning the short-term strategic thrust is to develop and build the museum’s audience in order to further justify a longer-term expansion of the museum’s operation. Increased visitor numbers are necessary and desirable for a number of reasons: they expose more people to the stories and artifacts at the museum and thus educate them more fully about their history and context; increasing actual visitor numbers are a signal or proxy for higher levels of awareness in the community of the museum’s existence (again, a good thing); and finally, increasing visitor numbers tell the community, stakeholders, potential partners, and politicians that there is growing interest and participation and there is desire in the community to support the museum operation.

At present the museum attracts only about 6,000 visitors annually. As a result of the short-term initiatives here, target levels of attendance should be 10,000+ - double the current levels within five years. This success will provide greater impetus and aid the momentum for a larger and more functional facility.

1. Update the Collections Plan:

There is a clear signal from the community that while the signature collection of Seagram artifacts (which currently comprise an estimated 85% of the roughly 10,000 artifacts in the collection) tell an important part of the history of the City of Waterloo, people would like to see the collections broadened to incorporate more of the other histories and stories of the community. There is a general feeling that the museum should represent stories and collections that are unique or particular to the city. Common suggestions reflected both specific and unique aspects of the history of the city, as well as broader narratives or ‘themes’ that might run through several of the specific types of stories. These stories and larger narratives included:

Suggested broader narratives and themes	Waterloo specific stories
<ul style="list-style-type: none"> • stories of geology, geography, early settlers e.g. Mennonite, First Nations • the story of innovation and invention • migration to the area and the creation of community • Waterloo as an ‘intelligent’ community • the development and evolution of the City (many would like to see a permanent exhibition to this effect) 	<ul style="list-style-type: none"> • early settlement • technology • insurance industry • early industry • universities • musical talents and organizations • local sports • agriculture • multicultural diversity



A collecting plan gap analysis needs to be developed to reflect and support these stories and themes.

2. Undertake an audit of the collections database

The collections database of the museum needs attention. There is a backlog of data entry and some records need to be cleaned up. This initiative would benefit from the City making an application to obtain grant funding for 1-2 additional temporary positions dedicated to addressing the backlog.

3. Transfer responsibility for the fine art collection to the museum

At present, responsibility for the city's collection of fine art rests with the Arts and Culture unit, not in the Museums and Collections unit. However, as this collection is part of the artifact holdings and relevant to the city's history, it more appropriately belongs under the museum's guidance. This transfer should be made and the collection incorporated into the museum collection. The storage and exhibition requirements of the fine art collection should be taken into account in all of the deliberations relating to the needs of the larger collection. Finally, when the city is considering acquisitions of art in the future, museum staff should be consulted regarding the historical significance of the potential acquisition.

4. Identify appropriate offsite storage options for current collection overflow

Some of the larger items in the collection are stored at a local moving company. A key short-term initiative would be to review the status of these artifacts, determine if any could be de-accessioned, and identify more appropriate storage facilities for those to be retained so that they are safe and well preserved over the long term. Also, part of this initiative could involve developing a plan for consolidation and reorganization in order to make items more accessible. This may include construction of additional storage space as part of an upcoming facility development.

5. Develop a plan for exhibition content at the former Seagram Museum (CIGI owned building)

There is a need to develop a plan for numerous artifacts currently exhibited at the old Seagram Museum [currently owned by CIGI who recently entered into a third party lease to a technology company]. This includes a range of small and medium sized artifacts on



display. While the current owner and new tenant are agreeable to keeping the smaller artifacts on site for the time being, this could change in the future. If the building were to be sold or leased again in the future for another purpose, the artifacts may need to be relocated, possibly at short notice and significant expense. This possibility necessitates the development of a contingency plan for available suitable storage space in the short term for storage of these artifacts. In the longer term, the desirability of having purpose-built storage should be considered.

6. Improved way finding signage

In the short-term while the museum stays in Conestoga Mall location, there is a critical need for improved internal signage in order to: a) increase awareness for users that there is in fact the City's Museum in the mall; and b) provide clear and easy directions as to where the museum is located. There are also opportunities for improved external signage within the mall property. The museum should work with mall management to identify means of effecting improvement in this regard.

7. Expand hours of operation

One of the most common opportunities raised through the public survey was to adjust or expand the hours of operation to make the museum operation more conveniently available to mall users and members of the public. (At present the museum is open Tuesday through Friday, from 9:30 a.m. to 4:00 p.m., as well as weekends in July and August.) Three possibilities were raised: later in the afternoon (until 5 or 6); one or more weekday evenings; and weekends in non-summer periods. Since the initiation of this study, the museum has taken steps to align hours more in line with demand, and is testing more weekends and evening hours on a pilot basis.

8. Explore greater orientation to in-mall markets

There is some opportunity to boost attendance numbers by providing specific programming to 'in mall' markets - i.e. the types of people who are in the mall at specific times of day: for example, seniors [who may be there for an early morning walk around the mall], families, children and (possibly) teens. This would need to be coupled with adjusted hours of operation (as per the previous recommendation) to ensure that this kind of programming might be available at times when these particular markets are available in the mall. Opportunities to provide this kind of programming, and using volunteers to assist, should be explored. Possibilities include 'pop-up' exhibits, banners, portable display cases within the mall corridors, etc.



9. Complete the development of the ten standards for Community Museums in Ontario

The Province requires minimum requirements for the operation of a good community museum. Regardless of a museum's size or scope, there are certain function, responsibilities and activities common to the preservation and presentation of material culture and are required to be in place before provincial museum funding can be accessed (through what is known as CMOG [Community Museum Operating Grant] funding). Attention and resources should be focused on completing the policies as soon as possible to enable access to additional grant funding, which would support a portion of the implementation of this strategy.

10. Continue to build new strategic partnerships

Strategic partnerships with other organizations in the community can greatly benefit the museum. Forms of partnerships could include: sponsorship agreements with the private sector, content partnerships with community organizations where the partners would assist in the development of the narrative and content of exhibits and events; and marketing partnerships, where the potential partner would help to promote the museum and its events to their membership, employee, base, etc. Such initiatives have several benefits:

- a) they give the museum credibility;
- b) they can help leverage the museum's resources enabling it to do more; and
- c) they help market and promote the museum to new audiences that are associated with the strategic partner.

11. Resolve branding confusion

A present there is tremendous confusion between the City of Waterloo Museum, 'THEMUSEUM' in downtown Kitchener, and the Waterloo Region Museum. It is recommended that the City re-brand to get away from the word 'museum' (in a sense this term has been pre-empted by others, and leads only to confusion and misunderstanding). Suggestions for an alternative identity arose through the interview process included: "*City of Waterloo Heritage Centre*"; "*Waterloo Discovery Place*"; "*City of Waterloo Trajectory*"; "*Waterloo History Exploration Centre*"; and "*Waterloo's Story*". These examples are only intended to give a flavor of the kind of identity envisaged. A fulsome branding exercise should occur to develop the appropriate brand identity to support success of the museum.



3.3 Medium-Term Recommendations (3 – 5 Year Timeframe)

Medium-term recommendations are planned for the period 2017 to 2019, roughly corresponding to years 3, 4 and 5 of the plan. They build on the accomplishments and milestones of the short-term planning period. In reality, some short-term items are on-going and will carry on throughout the medium term and even into the longer term. Equally, museum staff may decide that some medium-term recommendations can be implemented sooner rather than later, and initiate them in the short-term. The timeframe of short, medium and longer-term is simply meant to be a general guide to the sequencing and phasing of activities, but much of the specific decisions as to when and how to implement will be made by staff, at what they judge to be the appropriate time.

12. Develop a marketing strategy

The interviews and to some extent the community survey showed very low levels of awareness of the museum operation. There was widespread agreement that the museum operation needs to be better promoted and marketed to city residents. It should undertake a more concerted marketing strategy in order to ensure wider awareness of the facility and its programs. This should embrace traditional as well as 'social' media. This is considered to be a medium-term activity as it requires, to a large extent, that some of the earlier short term activities, such as resolving branding confusion and improved signage, to be underway in order to have the maximum chances of success.

13. Develop dedicated web site and related social media materials

Many community museums have dedicated stand-alone web sites that are more than merely web pages appended to the municipal web site. This approach demonstrates the significance of the museum as well as being more convenient and direct for users. It also enables more content, such as more detailed information related to specific exhibits, on-line access to the collections, and ticketing, etc. to be conveniently provided. This will also enable increased awareness and interest to be generated. Of course a link to the museum web site should always be present as well on the municipal web site.

There is also a need for more museum-focused social media. Current city social media channels must portion out coverage to the full range of municipal issues, which means the museum is only featured from time to time. Additionally, potential subscribers may be lost as individuals who are interested in the museum may not be interested in content on other city issues. Stand-alone social media for the museum would allow a



more in-depth, ongoing dialogue with the community. There may also be opportunity for a collaborative approach to social media for the museum with the Arts and Culture and Built Heritage staff as audiences are more likely to be similar across municipal cultural assets.

14. Consider expansion of the museum’s mandate to include relevant archival materials that support historical research about the city and its residents

Many other city and community museums, including several of those examined in the benchmarking assessment, combine an archival function with the city museum. There is some logic to this as the strategic intent of ‘museums’ and ‘archives’ is essentially the same (collecting relevant materials for present and future generations); the types of expertise required are similar; and both seek to enable public access to the materials in the collection, at least to some extent.

The city should consider the advantages and disadvantages of formally incorporating an archives function into the museum operations. It would not be appropriate for the museum to take on responsibility for overall records management at the City, which is currently handled by the Office of the Clerk with a focus on meeting legislative requirements, facilitating access to information for the public, and supporting corporate memory. There may, however, be opportunity for the museum to take an expanded role in collecting and archiving documents of particular historical value. While Museum and Clerks staffs have already been doing this informally for some time, there would be value in formalizing this process. This could involve a thorough review of existing records to document items that should be transfer at present or in the future to the Museum. It could also involve staff from both areas developing an agreed upon set of criteria and process that would specify the type and nature of material that could have future historic value and thus be worthy of retention by the Museum when they can be released from corporate records management. This approach may also help to ensure that these items are prioritized for storage in an appropriate environment to support long term preservation. In future, using these criteria would facilitate a process to alert Clerks staff when such materials become available for transfer.

This activity could also involve investigating what municipal material rests at the Archives of Ontario and Library and Archives Canada with consideration being given to repatriating some key documents. Consideration should also be given to how an archive function would fit with the Waterloo Public Library’s local history collection and Regional archives. A focus on retaining municipal materials works in a cooperative method with other collecting institutions and should consider facilitating access for researchers. Of



course, an expanded role for the museum would impact storage capacity and staffing resources.

15. Develop greater orientation to programming and education

Once the specific 'Waterloo stories' have been identified and developed through the updated collecting plan referred to above, there is an opportunity to work with local schools and groups to encourage them to come to the museum and learn about the community. (This would likely be of interest only to local, and possibly regional, schools.) While this would certainly be an opportunity for the expanded longer-term museum vision, there may be some scope to test the market within the context of the museum's existing location, recognizing that the current size of the exhibition space poses significant challenges. Consider integrating some new permanent displays in public spaces as a means of encouraging learning. As well, in the longer-term, there may be some opportunity for outreach: to take some of these stories into the classroom. This would likely require additional staff, and would need to be assessed further.

3.4 Longer-Term Recommendations (5+ Year Timeframe 2020 and beyond)

The same comments as were made above regarding the medium-term timeframe also hold for the longer term. Some of the initiatives described below may, in the judgment of staff, be better brought forward earlier than the definition of 'longer-term' time period would suggest.

16. Address need for more collections storage space

At present, the museum has approximately 3,500 square feet of storage space: 1,500 sq. ft. located at the Mall and 3,000 sq. ft. off-site. In the future, however, to accommodate the needs of a more diversified and growing collection as indicated above, it is recommended that proper and dedicated storage facilities be identified or developed. Ideally, as part of the longer-term strategy, this would be a component of an expanded Museum facility. As a preliminary estimate of the amount of storage space required for a more comprehensive collections plan, 7,500 sq. ft. is suggested as a preliminary planning figure. Ideally, this space would be consolidated at one location.

17. Address need for more exhibitions space

At present, the museum has approximately 1,200 square feet of exhibition space, located at the Mall. As well, the museum does maintain some showcases and display facilities in public buildings through the City (e.g. Visitor & Heritage Information Centre, City Hall and the former Seagram Museum, now CIGI). Additional display space to profile the stories and themes reflected by the collection, ***as well as some sort of permanent exhibition devoted to the growth and evolution of the City*** (a strong theme emerging



from the interviews), will be required. A preliminary planning figure suggests need for four times the existing display area, or 6,000 sq. ft. Of this amount, approximately one quarter (1,500 sq. ft.) would be dedicated to an orientation function; half (3,000 sq. ft.) would be devoted to permanent exhibitions; and the remainder (1,500 sq. ft.) given to temporary exhibits.

18. Address the need for dedicated programming space

The expanded collections focus and wider range of stories told at the City of Waterloo Museum would provide an opportunity to mount a greater range and variety of community and cultural programs. The space-related implications of offering public programming in or very near to the museum should be considered. A preliminary planning estimate of the amount of space required in this regard would be 1,300 sq. ft. Should the route of an expanded museum operation be investigated, synergies for space use as a result of possibly co-locating with other cultural facilities could be negotiated. This space would not need to be solely dedicated to a museum programming function. It could be a multi-use space serving other cultural and community functions.

Note: the total space requirements for a new museum facility would be:

Type of Space	Space Required (sq. ft.)
Exhibition Space*	
- orientation	1,500
- permanent	3,000
- temporary	1,500
Programming Space (community room, classroom)	1,300
Collections (storage, curatorial workrooms)	7,500
Public Support (lobby, washrooms)	1,200
Back-of-House Support	1,500
Administration**	2,000
Net Area	19,500
<i>Gross-up Factor (30%)</i>	<i>5,900</i>
Gross Floor Area	25,400

* Note: Exhibition space about 30% of the net floor area

** This amount of space would be sufficient to accommodate 6-8 staff persons (which may be required by the time of the move into larger premises)

19. Undertake feasibility study for a new facility

Given the feedback for a long-term vision as outlined above, a key activity in the medium-term would be to undertake a feasibility study for the repositioning of the museum into a larger space in a culture centric area of Waterloo, where the needs for exhibition,



programming, storage and conservation could be taken into account. As outlined in the situational analysis, ideally the museum operation could be co-located with other cultural facilities in the central area.

Several possibilities have been suggested through the public consultation process (including the CIGI facility [old Seagram Museum] and the Carnegie Library building) and there may be other possibilities available when this feasibility study takes place. Such a feasibility study should consider the following:

- *specification of the collection-related space needs of the facility (following the general guidelines outlined here, but also within the context of the Collections standard developed)*
- *specification of the exhibits and programming-related space needs of the facility (following the general guidelines outlined here, but also within the context of the Exhibition standard developed)*
- *identification of all other space needs*
- *detailed review of potential site possibilities, with specific consideration of co-location possibilities with other cultural and related operations*
- *preliminary capital cost estimation*
- *projection of staffing and related needs*
- *governance considerations*
- *development of attendance and utilization projections*
- *projections of operating costs and revenues*
- *projections of economic impact of construction and operation upon the community*
- *preliminary fundraising feasibility assessment*

20. Consider the role for a 'Friends of the Museum' Group to provide support and guidance on the future of the museum

The City of Waterloo currently has an Advisory Committee of Culture, which advises Council and staff on cultural matters across the city. The scope of this committee covers arts, culture and heritage, which includes the museum operations. In the future, however, when the museum pursues its longer-term vision and becomes a larger entity with a broader range of collections, exhibits, programs and events, it would likely warrant consideration to create a specific 'Friends of the Museum' group for the Museum. The mandate of this group could include general community advocacy, fundraising projects, an advisory role, and various other volunteer assistance projects within the museum. The terms of reference for and composition of this group should be considered carefully. This is considered to be a longer-term activity as there will likely be more community interest in supporting such a group (and thus its chances of success will be greater) after some of the short and medium term phases of the strategy have developed some traction and increased community awareness and engagement with the Museum.



4. Strategy Implementation Plan

This section of the report develops an implementation plan for the Museum and Collections Strategy. First, the overall framework for implementation is presented. Next, the detailed implementation plan itself is developed, using the implementation plan framework outlined. Finally, monitoring and evaluation considerations are discussed.

4.1 Implementation Framework

The implementation plan framework considers, for each of the recommended actions in the strategy, the following dimensions:

- **Roles and responsibilities of those in charge of implementing the activity:** Here, the main consideration is to identify the organization(s) and agencies responsible for ensuring that a specific strategic action is implemented. Main actors that are the focus of this implementation plan will be museum staff, city council, other municipal staff, etc. Responsibility for seeing the actions through are seen to be **primary** (having the main responsibility for initiating and delivering the final product or result) or **secondary** (where the organization or agency named is not the primary one responsible for delivering on the action, but has some responsibility to help see it through). Finally, an **advisory** responsibility would be where the organization may simply be called upon for advice and options.
- **Timing and Critical Path:** This aspect of implementation addresses the time period in which the actions are thought to take place. Thinking that this strategy will set out a road map for the next 5 years and beyond, the following time periods are suggested:
 - short-term (2016 and 2017)
 - medium-term (2018 to 2020)
 - longer-term (2021 and beyond)

Part of the consideration of the timeframe will involve the assessment of actions that may be on a 'critical path' – that is, they must be undertaken before other recommendations can be implemented.

- **Financial implications:** Another key aspect of implementation will be the financial resources required, which is the dollar cost outlay of implementation. Some recommendations can be implemented within existing resources, while others will require operating budget increased, or one time funding for specific projects.



A possible source of one-time, project funding to support implementation of this strategy is the Heritage Reserve. The Heritage Reserve was established with a one-time contribution made in 2002 when several pieces from the acquisition of the Seagram Collection could not be accommodated and were sold. The reserve enables staff to acquire artifacts and specimens of

significance to the understanding of the history of the City of Waterloo, as they become available. The Heritage Reserve provides funding to projects related to program delivery and studies to further the Museum’s development. It also allows for any donations received to be used to invest in the museum’s collection, or towards another specific objective as per the donor’s intent, rather than contributing to operating costs. The Heritage Reserve is also intended to support built heritage conservation efforts.

Revenue sources of the Heritage Reserve include cash donations made with or without a specified purpose, monies received from fundraising activities, budgeted contributions, grants or subsidies for the benefit of the collection, insurance payments received for historical property loss, damage, or theft, and proceeds from the sale of historical properties and de-accessioning of artifacts.

In 2009, this reserve balance was depleted to assist with the costs associated with the move to the museum space at Conestoga Mall, as approved in report R&L09-13. Contributions from year-end surplus were made in 2009 and 2010 to rebuild the reserve. In 2011, proceeds from the sale of the City of Waterloo Train Station, approximately \$640,000 were allocated to this reserve (CORP2013-042). Funding from this reserve was used to develop this strategy and the built heritage strategy.

4.2 Implementation Plan

The charts below and overleaf outline implementation considerations according to the framework outlined above.

City of Waterloo Museum and Collections Strategy – Detailed Implementation Plan

Recommendation	Responsibility	Timeframe	Financial Implications
1) Update the Collections Plan	Museum staff (primary)	Short-term	Within existing resources
2) Undertake an audit of the collections database	Museum staff (primary)	Short-term	Within existing resources
3) Transfer responsibility for the fine art collection to the museum	Museum staff (primary)	Short-term	Within existing resources
4) Identify appropriate offsite storage options for current collection overflow	Museum staff (primary)	Short-term	Possibly up to \$10,000 / yr. in additional space rental costs in short / medium term
5) Develop a plan for exhibition content at	Museum staff (primary);	Short-term	Financial implications



Recommendation	Responsibility	Timeframe	Financial Implications
the former Seagram Museum (CIGI owned building)	CIGI (secondary)		will be identified once plan has been developed
6) Improved way finding signage	Museum staff (primary); Conestoga Mall management (secondary)	Short-term	On the order of \$5,000 for expertise, and \$5,000 for way-finding signs and placement (one time funding)
7) Expand hours of operation	Museum staff (primary)	Short-term	Within existing resources
8) Explore greater orientation to in-mall markets	Museum staff (primary); Conestoga Mall management (secondary)	Short-term	Within existing resources
9) Complete development the ten standards for Community Museums in Ontario	Museum staff (primary); Policy and Performance Analyst (secondary)	Short-term	Within existing resources
10) Continue to build new strategic partnerships	Museum staff (primary); community organizations and enterprises (secondary)	Short-term, and on-going	Some small budget implications: up to \$5,000 operational increased
11) Resolve branding confusion	Museum staff (primary); community organizations and enterprises (secondary)	Short-term	Possible retain branding consultants to assist with brand / name identification – allocate \$20,000 - \$30,000 (one time funding)
12) Develop a marketing strategy	Museum staff (primary); other municipal departments	Medium-term	Possibly retain marketing consultants to assist with marketing – allocate \$20,000 - \$30,000 note: could be some economies of scale if undertaken with #19 (one time funding)
13) Develop dedicated web site and related social media materials	Museum staff (primary); other municipal departments; possibly external expertise	Medium-term	External assistance required to develop website - \$10,000 - \$20,000 (one time funding, ongoing staff support)
14) Consider expansion of the museum’s mandate to include relevant archival materials that support historical research about the city and its residents	Museum staff; other municipal staff; Council (primary)	Medium-term	Financial implications would be identified based any recommended changes in role/scope
15) Develop greater orientation to programming and education	Museum staff (primary); Boards of Education (secondary)	Medium-term	Could involve re-alignment of existing customer service position to programmer



Recommendation	Responsibility	Timeframe	Financial Implications
			position: would involve approximately \$15,000 additional cost annually
16) Address need for more collections storage space	Museum staff (primary)	Longer-term	Additional planning/analysis required
17) Address need for more exhibitions space	Museum staff (primary)	Longer-term	Additional planning/analysis required
18) Address the need for dedicated programming space	Museum staff (primary); community organizations and enterprises (secondary)	Longer-term	Additional planning/analysis required
19) Undertake feasibility study for a new facility	Museum staff (primary); other municipal departments	Longer-term	\$50 - \$75,000 budget for feasibility and planning study
20) Consider the role for a 'Friends of the Museum' Group to provide support and guidance on the future of the museum	Museum staff; other municipal staff; community partners; Council	Longer-term	Additional planning/analysis required

4.3 Evaluation Considerations

Reporting Frequency

The City of Waterloo Museum should report annually to Council on the progress it is making on the implementation of this strategic plan. This would consist of a short presentation on major achievements and challenges. Also, some key metrics in terms of attendance, collections, etc., should figure in the presentation; these are discussed further in the section below.

In addition to a council presentation, the museum may wish to put some of the information up on its website as a report back to the general public. It may also wish to encapsulate this information into an email for those on its email list, and possibly a short handout that could be distributed to visitors and the general public.

Evaluation Metrics

There are several metrics that will be significant and important as the strategy moves forward. These will be the key dimensions through which the success of the strategy will be measured, and include:

- Attendance:** The number of people from the community who are exposed to the museum will be an important dimension showing interest and relevance. Right now, attendance levels are hovering at about 6,000, which is very low for a community museum, according to the benchmark work undertaken as part of this project (and especially considering the high volumes of traffic generated by the Conestoga Mall). A



reasonable target for the end of the 5-year period should be at least double this number. In the longer term, if the museum is relocated into new, larger facilities, attendance projections and targets would presumably be considerably higher even than this.

- **Target market segments:** Another metric to consider would be to track the audience to demonstrate usage by specific target sectors: for example, school groups, new residents to Waterloo, multicultural organizations, etc. Here audience percentage targets would be most appropriate.
- **Collections:** The number of relevant items in the collection is often another measurable dimension of importance to museum operations. It is reasonable to expect that as the City of Waterloo Museum begins to expand its 'repertoire' of stories told, the artifacts in the collection that will support those stories will grow also. However, rather than have a specific target number for the size of the collection, which would be unrealistic and arbitrary, the report back to Council and the public should show simply that the collection is growing in size and is becoming increasingly diverse.
- **Web site hits:** At present, the museum's web site is fairly basic, but as awareness of the museum and the stories it tells grows, so too should hits on the web site. It is probably most appropriate to show increasing growth year after year, as opposed to having any sort of specific target in place.
- **Cataloguing:** As discussed in the report, there is a backlog of items in the collection that have not yet been adequately catalogued. A reasonable target would be to ensure that the entire backlog was removed by the end of the 5 year period. This, of course, means that not only artifacts currently existing in the collection would need to be cataloged, but also any new items acquired over the next five years be catalogued. At the end of this period, only the most recently-acquired items should need proper cataloging, and there should be no significant backlog extant. Moreover, there should be an expected and reasonable turnaround time for cataloguing, to ensure that a backup does not accumulate in future.
- **On-line access:** As earlier outlined, one of the recommendations had to do with making some portion of the collection available on-line. Again, it is probably not appropriate to set a specific target, but rather to show on-going progress on this dimension each year, in terms of the total numbers of items available electronically.
- **Partners:** The development of community partners is another strategic direction espoused in the plan. Here again, rather than have a specific target number, it is most



appropriate to show increasing involvement of the community in the museum operations through partnership development.



Appendix B
To COM2015-025

Museum and Collections Research,
Consultation & Situation Analysis Report



Museum and Collections Research, Consultation & Situation Analysis Report

October 7, 2015

TCI Management Consultants

in association with

Reich + Petch Design International and
Maltby & Associates Inc.

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1. Introduction

This report presents the comprehensive program of research, data collection and public consultations conducted, and the situation analysis developed, to inform the development of the Museum and Collections Strategy for the City of Waterloo Museum.

This report starts by describing the research undertaken to identify the operational and strategic issues that exist, to which the strategy developed must ultimately respond (see the City of Waterloo Museum and Collections Strategy report for the final strategy).

First, the key background documents reviewed are listed and summarized. Next, the primary themes and perspectives resulting from the interviews and workshop sessions held are reviewed. This is followed by the key findings emerging from the community survey. Finally, the results of the benchmarking assessment comparing the City of Waterloo Museum with other community museum operations are presented.

These results then provide the basis for the findings and conclusions found in the Situation Analysis in the next section.

2. Research and Consultation Findings

2.1 Background Materials Reviewed

There are several key documents that provide context for the Museum and Collections Strategy. These are briefly discussed below.

City of Waterloo Culture Plan (2013)

The main policy document of the City of Waterloo that touches on the operation of the museum is the Culture Plan: ***A Catalyst for Culture 2014 – 2024***, prepared in 2013. The purpose of this plan was to define the community’s vision for culture over the next 10 years; identify the city’s role in supporting local cultural development to achieve the community’s vision; and to establish strategic goals and recommended actions for the City to pursue to support the community’s vision. The community vision for culture in Waterloo was identified to be: ***“Remaining true to our past, building on present strengths, and making the most of opportunities, Waterloo is a culturally transforming city – vibrant and resilient”***.

There are three strategic goals and associated recommended actions in the plan where the museum is seen as playing a significant role. These are:

Goal# 2 of the plan is to ‘**strengthen the community’s cultural heritage identity by uniting Waterloo’s past with its present and future through management and education**’. Several strategies under this goal are directly relevant to the operation of the museum:

- 2.2 Develop a strategy that encompasses growth and long-term management for the City of Waterloo Museum and archival collections (i.e. the present study)
- 2.3 Increase programming capacity to recognize heritage as a strong educational component of culture
- 2.4 Digitize the city's heritage collections to provide online access
- 2.5 Continue development of the series of provincial standards for community museums to support the City of Waterloo Museum

Goal #4: Enhance engagement of community diversity to build a stronger, shared sense of belonging

- 4.6 Work with Aboriginal stakeholders to share Aboriginal culture and heritage with the broader community – Here the museum was seen to be able to play a role in an exhibit recognizing the significant contributions that Aboriginal residents have made to the growth and development of the community

Goal #5: Expand community awareness and appreciation of culture

- 5.1 Promote local culture to residents – Here the museum was seen to be one key delivery agent (along with others in the community) to promote local culture to residents

Recreation and Leisure Services Master Plan (2008)

This policy document sets the stage for the development of the current museum facility at Conestoga Mall:

“Despite the development of a new regional history museum in Kitchener, city residents value the City’s collection for its distinctive Waterloo industrial heritage profile related to the Seagram family business. Many continue to mourn the loss of the former Seagram Museum (now the Canadian Institute for Governance Innovation) as a cultural anchor in the downtown core. As well, the City lacks a retention method and dedicated archival space for the conservation and management of historically significant documents generated by the City and other sources.” (p. 7-12).

Elam Martin Farmstead Preservation Master Plan (2003)

The Elam Martin Farmstead was purchased by the City of Waterloo in 1999.

In 2003, the firms of Goldsmith, Borgal and Company, and Landplan developed a plan for the preservation and interpretation of the Elam Martin Farmstead. The report evaluated several options, from ‘do nothing’ to an extensive redevelopment option. Costs were not considered in this assessment. The recommended option, adopted by the city, was:

“Based on the options evaluated, the recommended option is that the site remains occupied by the current tenant until such time as it is mutually suitable for his and his family’s relocation. In the absence of a clear use for the site and due to lack of substantial operating resources for major upgrading and development, such an option is the right decision for the interim to allow the development of the site to meet future needs while ensuring its current preservation.”

As a heritage asset, the idea that this site could be used by the museum for programming purposes has come forward from residents and council members over the years, necessitating further exploration of the opportunities for the Elam Martin Farmstead and its connection to the museum in this strategy.

2.2 Interviews and Workshop Session

In late November 2014, a two-day intensive series of individual and group interviews was held with several community members including members of the City of Waterloo Advisory Committee on Culture (ACC), the Municipal Heritage Committee, the ad hoc Museum advisory committee, museum staff and volunteers, community and academic representatives who have an on-going and informed knowledge of the City of Waterloo Museum's role and opportunity in the community, and key staff from across city departments. A standardized interview guide was developed.

In mid-February, two half-day workshops were conducted with a cross section of those interviewed in November, along with city staff and managers, with the full consulting team. The format included a series of presentations on the current trends and directions that museums such as the City of Waterloo Museum are taking relative to facilities, programming, collections, as well as a report on the preliminary results of the public survey results.

Following the workshop, participants enjoyed a lively facilitated discussion of a series of 'Big Questions' that the consultants, with city project staff, jointly developed around some of the major issue areas that had been identified but for which directions forward were not readily apparent. The 'Big Questions' and the order of the questions varied between the two sessions based on initial reaction and the opportunity for the attendees to put forward their own 'Big Questions'. The list included:

- How can the museum collections, exhibits and programming (education and public) better serve the Waterloo community?
- Where does the present mall site fit in our future plans today and tomorrow?
- If there is a future new museum site where should it be and should other community facilities be part of the concept?
- What about the farm (Elam Martin Farmstead)?

Key Consultation Themes

Both the interviews and the workshops provided similar observations and conclusions for the future directions of the City of Waterloo Museum. Three key baseline themes were apparent to all these being:

- Museum Operations
 - Short Term
 - Longer Term/Future

- The Elam Martin Farmstead
- Collections

A summary of both the interview and workshops principal themes follows:

Museum Operations

Short Term:

- **Hours and days of operation¹:** Times that the museum is open to the public need to be harmonized with overall mall operation: open into evenings on weekdays – e.g. open until 8 p.m., open Saturdays (year round, not just summer).
- **Diversify the collection to be more representative of overall Waterloo history:** Reflect technology; financial services; universities; possible overall themes of innovation, entrepreneurship; creativity; idea: undertake a public consultation program to identify what stories / themes are meaningful and relevant to the citizens and then build the collection around these.
- **Better signage to museum:** a) from the community to the mall; b) on the outside of the mall; c) within the walkable spaces in the mall
- **Branding:** tremendous confusion between ‘THEMUSEUM’ in downtown Kitchener and the Waterloo Region Museum – re-brand to think about moving away from the word museum (pre-empted by others) - also related, need to identify / clarify the unique role of the City of Waterloo Museum in the mix of other museum and cultural activities in the region
- **Awareness:** low levels of awareness – the museum needs to be better promoted and marketed to city residents – current visitation has high proportion of ‘accidental’ visitors (i.e. those not originally intending to visit the museum but find themselves in the vicinity and who decide to drop in)
- **More strategic partnerships:** partnerships with a variety of community organizations is useful from a variety of perspectives: a) gives museum credibility; b) leverages museums resources; c) helps market & promote
- **Greater programming orientation to school groups:** take programming to the schools

¹ Current situation: The museum is open Tuesday to Friday from 9:30 a.m. to 4 p.m. Additional hours in July and August - Saturday: 9:30 a.m. to 4 p.m. Sunday: 12 to 5 p.m.

Long Term/Future:

- **UpTown location:** There is aspiration and interest for a more central site that can accommodate additional exhibitions, programming and storage space that would enhance the profile of the current museum.
- **Co-location possibilities:** Should investigate possibility of co-location with other complementary activities: library, artist space, tourist information, business incubation – use of heritage building as part of a cultural hub.
- **Permanent display on history of growth, development, evolution of the city:** should be a key part of the permanent collection.

Elam Martin Farmstead

No consensus was seen here, other than:

- a) the Farmstead has potential to consume considerable resources (and will increasingly do so if it is to be used for public programming);
- b) the Farmstead is not an outstanding historical asset, despite its local designation as a historically significant site;
- c) similarly there is much room for improvement if it were to be an interpretive asset. There are also many greater examples within the region telling the Mennonite story, including Brubacher House on the University of Waterloo campus; the Steckle Heritage Farm in Kitchener; the Visitor Centre in St. Jacobs (where the ‘Mennonite Story’ can be experienced); and living history sites Joseph Schneider Haus in Kitchener and Doon Heritage Crossroads in Kitchener. These are all established attractions that tell various aspects of the Mennonite story in the region and arguably feature better examples of that culture’s buildings and traditions than at the Elam Martin Farmstead.

Many thought that regardless of the future of the farmstead, it should not be seen as tied to the City of Waterloo Museum as a programming site or part of the museum’s collection. Following clarification that future use of the site should not be seen connected to the museum, other options for use of the site to meet community needs and interests should be explored.

2.3 Community Survey

An on-line survey was promoted on the City’s website, and notifications were sent out by city staff to those on the arts/culture and museum mailing lists, as well as through social media and

newspaper ads. The survey ran from mid-December to mid-March 2015. Some 301 responses were received, which is impressive for a survey of this type.

Key findings from the survey were:

Question 1: Location of Residence

While most respondents were from the City of Waterloo (61%), there was good representation as well from the City of Kitchener (24%), elsewhere in Waterloo Region (9%) and some even from outside the Region (6%)

Question 2: Age

All ages were represented, from under 20 to 81 and above – the bulk of responses (60%) were in the 31 to 60 age brackets

Question 3: Employment Status

Most respondents were employed full-time (62%), with retirees being the largest next group (20%); students, part-time and homemakers constituted the remaining 18%

Question 4: Cultural venues visited in the last year by respondents were:

Cultural Venue	% indicating they had visited in last year
THEMUSEUM	58%
Waterloo Region Museum	57%
Doon Heritage Crossroads	43%
City of Waterloo Museum	36%
Joseph Schneider Haus	34%
McDougall Cottage	13%

Question 5: An information question, asking respondents if they would like further information about the collection: 68% replied 'yes'

Question 6: Should the Seagram collection remain the dominant focus of the museum?

Answer Choices	Percentage
Yes, it should remain the dominant focus of the collection	13%
No, but it should remain as one of the collections maintained by the museum	81%
No, it is a minor part of our history and should be phased out	1%
Not sure	5%

Question 7: Are there other aspects of the city's history that should be included in our collecting activities?

Answer Choices	Number of Responses
History of manufacturing beyond just Seagram's	42 responses *
Early settlement, Mennonite and German history	31 responses
History of the growth of the Universities	30 responses

Answer Choices	Number of Responses
Research and technology (inc. RIM and BlackBerry)	30 responses
Histories of individuals (Erb, Lazaridis, etc.)	21 responses
Urban growth and development including architectural history	20 responses
Social and sports life of the community	14 responses
History of First Nations	10 responses
History of insurance and financial services industry	10 responses
Military contributions of Waterloo residents	5 responses
Arts and culture in the community	5 responses
Multicultural history of the community	5 responses
Brewery history	4 responses
Ecological / natural history of the city	3 responses
History of the button industry	3 responses
History of relationship with Berlin / Kitchener	2 responses
Musical history	2 responses
History of photography in Waterloo	2 responses

** of 162 who answered this open-ended question*

Question 8: Should more information about the collection be made available on-line?

Answer Choices	Percentages
Yes	69%
No	6%
Don't Know	25%

Question 9: Ways to more effectively promote the museum (note that this was an open-ended question):

Answer Choices	Number of Responses
- more effective use of social media	44 responses *
- change the hours of operation	20 responses
- improved signage within the mall	14 responses
- through greater use of print media	13 responses
- co promote with other cultural organizations	11 responses
- move to a more central location	10 responses
- more effective partnerships with the schools	10 responses
- through more radio promotion	6 responses
- more partnerships with the library	5 responses
- through television advertising	5 responses
- dedicated website	4 responses
- kiosks and pop-up museums throughout the city	4 responses
- hold more events	3 responses
- more affordable entry fees (!)	3 responses
- advertise on bus shelters	2 responses
- more ads	2 responses

** of 160 who answered this open-ended question*

Question 10: At present the museum changes its exhibition themes every 3-4 months. In your view, is this the right frequency of changeover for exhibits?

Answer Choices	Percentages
Yes, it's about right	73%
No: too long between exhibitions	9%
No: too short between exhibitions	5%
Don't Know / Can't Say	13%

Question 11: Should there be some sort of permanent exhibit on the history of the growth and development of the City of Waterloo?

Answer Choices	Percentages
Yes	74%
No	3%
Uncertain – there are pros and cons	21%
No idea	3%

Question 12: Is there value in bringing in temporary exhibitions from other institutions to the museum?

Answer Choices	Percentages
Yes	82%
No	8%
Uncertain	10%

Question

13: Do you have any other ideas for exhibitions, programs or events that could be mounted or hosted at the museum?

Answer Choices	Number of Responses
History of the growth and development of Waterloo	12 responses *
Make the hours of operation more convenient	5 responses
Feature local artists and artisans more prominently	5 responses
More interactive / participatory / hands-on exhibits	5 responses
More exhibits on the history of local manufacturing	5 responses
Local bands and music	3 responses
Research and technology (including RIM and BlackBerry)	3 responses
More touring exhibits	3 responses
Should tackle tough social justice and environmental issues	2 responses
History of prohibition in the community	2 responses
More talks, presentations, discussion around specific exhibits	2 responses
More high-tech stories	2 responses

* of 103 who answered this open-ended question

Question 14: Since 2009 the City of Waterloo Museum has been located at Conestoga Mall. Prior to this survey, did you know where the City of Waterloo Museum was located?

Answer Choices	Percentages
Yes	62%
No	35%
Uncertain	3%

Question 15: What would you say are the major advantages of the current location?

Free Parking	93%
Ability to combine trip to the Museum with other activities (e.g. shopping, dining)	65%
Good highway access	46%
Proximity to crowds	39%
Two entrances – one from outside, one from Food Court	36%

Question 16: What would you say are the major disadvantages of the current location?

Answer Choices	Percentages
Poor signage	66%
Days and hours of operation not consistent with Mall hours	65%
Not in the centre of town	51%
Location is not in the main part of the Mall – off to the side	43%
Noise and crowds not conducive to museum visit	27%

Question 17: The City's Culture Plan identifies that the museum needs to look at 'new innovative models of collaboration with other community organizations to enable growth'. In your view is the museum's current location an advantage or a disadvantage when considering this direction? (Question 18 allowed for further commentary)

Answer Choices	Percentages
An advantage	18%
A disadvantage	35%
Some of both	40%
I have no idea	7%

Question 19: The museum does not currently offer education or programming activities on-site due to the lack of space and staff. Should this be an area of focus in future? (note that these are open-ended comments)

Answer Choices	Number of Responses
Response generally indicating 'yes' (of 222 responses)	158 responses
Response generally indicating 'no'	22 responses
Response generally indicating 'unsure', 'don't know', 'possibly'	30 responses

Answer Choices	Number of Responses
Other comments	7 responses

Question 20: The museum has presented a number of exhibitions in partnership with other organizations. Should further partnerships be pursued as a strategic priority? (note that these are open-ended comments)

Answer Choices	Number of Responses
Response generally indicating 'strongly yes' (of 214 responses)	191 responses
Response generally indicating 'yes, but not a strategic priority'	7 responses
Response generally indicating 'no'	3 responses
Response generally indicating 'unsure', 'don't know', 'possibly'	32 responses
Other comments	4 responses

Question 21: The museum also partners with the private sector to place artifacts and exhibits in public spaces. Should more of this type of activity be considered a priority? (note that these are open-ended comments)

Answer Choices	Number of Responses
Response generally indicating 'strongly yes' (of 214 responses)	163 responses
Response generally indicating 'yes, but not a strategic priority'	20 responses
Response generally indicating 'no'	7 responses
Response generally indicating 'unsure', 'don't know', 'possibly'	16 responses
Other comments	5 responses

Question 22: Preferred hours of operation:

Answer Choices	Percentages
They are fine the way they are	19%
They should be changed	72%
No idea / don't know	10%

Question 23: Specific comments relating to hours of operation:

Answer Choices	Number of Responses
Should be open all weekends – both days	83 responses*
Should be open all Saturdays	25 responses
Should be open all Sundays	6 responses
Should be open evenings	49 responses
Hours should be consistent with Mall hours	20 responses
Open Friday Nights	2 responses
Should only be closed 1 day a week (some specific suggestions for Monday, Wednesday)	8 responses
<i>Suggestions for specific hours</i>	
- 10 to 6	1 – 2 responses each
- 10 to 8	
- 11 to 5	
- 12 to 9	
- 1 or 2 to 8	

** of 174 open-ended responses received*

Question 24: An information question, asking respondents if they would like further information about the Elam Martin Farmstead: 63% replied 'yes'

Question 25: Before this survey, had you known about the Elam Martin Farmstead?

Answer Choices	Percentages
Yes	41%
No	55%
Not sure	4%

Question 26: Should the City consider the Elam Martin Farmstead as a potential location for cultural programming?

Answer Choices	Percentages
Yes	69%
No	8%
Not sure	23%

Question 27: Do you have any thoughts or suggestions as to how the Farmstead might be best used in the pursuit of Waterloo’s museum program?

Answer Choices	Number of Responses
teach about the agricultural and Mennonite history of the city	46 responses *
concern about duplication with Doon, Steckley, Joseph Schneider Haus	11 responses
would make a better location for the Museum than the current location at Conestoga Mall	8 responses
venue for events and workshops	8 responses
no idea what to do with it	7 responses
good venue for school groups	6 responses
venue for community gardening / market garden	3 responses
teach about nature and environmental themes	3 responses
Make sure it generates revenue to offset operating costs	2 responses

** of 97 who answered this open-ended question*

Question 28: At the conclusion of the survey was an open-ended question of the ‘Any Other Comments?’ variety. (100 respondents commented on this question.) Below is a summary of common responses:

General Appreciation: Many respondents commented on their appreciation of the heritage and culture of Waterloo and the value of the museum in preserving and displaying the city’s heritage and culture. Respondents were complementary of the staff and volunteers at the museum.

Lack of Awareness: Many responses that focused on how little of the Waterloo population and visitors were aware of the museum. The most common reason for lack of awareness was the location and hours of the museum. The majority of respondents believed that the current location of the museum in Conestoga Mall is a poor choice because of its low profile, poor signage, and many do not want to have to go to the busy mall to visit the museum. As well, the current hours of the museum do not attract business. For example, several responded that they cannot visit the museum because they are at work during the hours that the museum is open. Many respondents suggested new museum sites located in the Uptown core of the city. It is believed that Uptown sites would better support heritage and culture and museum visitors could walk or bike to these sites.

Need for Increased Promotion: Apart from a new location and hours, respondents believed that increased promotion and marketing of the museum, as well as a larger variety of interactive exhibits that focused on current social issues rather than just history, would attract more residents and visitors to the museum.

Funding Options: here were mixed responses in terms of funding the museum. Some respondents were glad to see more attention being paid to the museum and indicated

an interest in seeing it grow and become more prominent in the community. Other respondents want the museum to change for the better, but are concerned about the cost to residents in light of many competing priorities.

2.4 Benchmarking

Selection of Benchmark Comparables

An important part of the development of the Museum and Collection Strategy was to benchmark or to compare the City of Waterloo Museum to select other community museums in Ontario. Nine Southwestern Ontario community museums were identified based on knowledge, relationships, previous experience and relevancy to the City of Waterloo Museum's situation. A summary table showing the results of this benchmarking task can be found in Appendix B.

Several criteria were considered in the selection of the potential candidate institutions including,

- Situations where there is both a local and regional (or county level) municipal museum operating within a geographic and market area e.g. the Guelph Civic Museum and the Wellington County Museum & Archives
- Municipal museums from communities with a similar population size to the City of Waterloo (not too big and not too small)
- Inclusion of some museums with a joint role as both a museum and archives
- Museums that are well regarded in Southwestern and Central Ontario by museum peers for their programs and contributions to the community

Based on these criteria, the selected museums that agreed to participate included:

- Waterloo Region Museum (regarded as the best and largest regional level museum in Ontario)
- Guelph Civic Museum and the Wellington County Museum and Archives (municipal and regional context)
- Niagara Falls History Museum - a relatively new facility that has a lot of competition for attracting audiences
- St. Catharines Museum – an interesting shared space facility
- Leading county level museums that have the prime role as museums and archives (3 of the 4) and are well regarded for their community based programming, including Dufferin County, Grey Roots Museum, Bruce County, and Chatham-Kent.

The categories of information sought were focused on some of the principal metrics of any museum's operations and designed not to be too time intensive for the participating museum directors and at the same time to provide relevant comparisons to assist the City of Waterloo. The information is presented in several category areas including:

- Context (population served, size of the county or city budget, the physical site of the museum (downtown, suburban or rural))
- Municipal financial data for museums including: annual operating budgets, municipal share or contribution of the museum's budget and the per capita cost per person for the operation of the museum

Museum metrics including: average number of visitors of the past five years, staffing levels, physical size, allocation of space between the front and back of the house (administration, storage, etc.) and collection size.

The findings from this benchmarking exercise must be considered as directional as they may not account for differences in the accounting practices between municipalities, the fact that some of the institutions share facilities with other functions, and different methodologies between museums in reporting and the breakdown of visitors. The information presented is generally accurate and indicative of the situation for each of the participating museums. The museum information was provided by the participating museum directors. The municipal data was taken from the most recent budget documents and verified as being correct by most of the participating museum directors.

Inclusion of the Waterloo Region Museum in this study warrants some discussion. While the Waterloo Region Museum is intended to be a community museum like the others included in this study, its much larger size and its success lead to a slight upwards skewing in the overall comparative metrics given its particularly larger footprint, budget and number of visitors for a community museum. For this reason, in the analysis below data from the Waterloo Region Museum was removed to provide a more accurate reflection of the situation of the City of Waterloo Museum compared to the other more similar institutions in the sample. The Waterloo Region Museum data can be found in Appendix A to provide comparison between this institution and other community museums.

For the 'Municipal Contribution' row in the table, the percentage reflects the municipal portion of the budget as a percentage of the **total** operating budget in the last fiscal year of operation. Other sources of revenue would be earned revenues such as admissions, gift shop sales, grants, endowment income, etc. A very high percentage of municipal contribution could indicate an unhealthy reliance upon just one source of funding.

Note that the in-kind provision of resources is another dimension of support, but was not measured here due to wide variation in practice, and the fact that such support is never quantified and thus is very difficult to measure. It should be noted that all municipalities support their local museums with some level of in-kind support to some extent, but this is not reflected in the chart.

This data is consolidated in the table below. An overview of all participating municipally operated museums is contained in Appendix A.

Key Findings and Conclusions

Category	City of Waterloo Museum (2014)	Average Among the Other Participating Museums*
Museum Operating Budget	\$244,000 (including salaries)	\$1,180,000 (including salaries)
Municipal Contribution As Percent of the Museum Total Operating Budget	98%	82%
Per Capita Cost of the Museum to all Residents of the Community	\$2.45	\$15.20
Size of Museum in Square Feet	4,000 SF	33,500 SF
Average Number of Annual Visitors Last Five Years	6,000	29,600
Staffing Levels Full Time & Part Time	1 FT 2 PT	12 FT 3 PT

• *Guelph Civic Museum, Wellington County Museum & Archives, Niagara Falls History Museum, St. Catharines Museum, Dufferin County Museum, Grey Roots, Bruce County Museum & Cultural Centre, and Chatham-Kent Museum. The Waterloo Region Museum was specifically excluded.*

Implications

The information obtained and presented shows that the City of Waterloo, among the sample of nine other municipal museums in Southwestern and Central Ontario, is sub-optimal compared to the performance measures for most of the other museums and the municipal governments. This is summarized in the following table that considers the facts and the implications for the City of Waterloo and its museum. It should be noted that the City of Waterloo Museum's current mandate is to service a smaller niche market than many of these other museums, as the Waterloo Region Museum is intended to serve the regional market and tourist populations. It would not be reasonable to expect the City of Waterloo Museum to compete with the larger Waterloo Region Museum. Rather the City of Waterloo Museum should play a complementary but distinct role in telling the unique stories of Waterloo.

Comparisons and Implications for City of Waterloo Museum from Benchmarking Data (2014)

Area	Facts	Possible Implications
Visitor Levels	<p>Taking out the large attendance (80,000 in 2014) at the Waterloo Region Museum leaves an average annual attendance of 22,000 among the eight other museums in the sample</p> <p>The City of Waterloo Museum has an annual average of 6,000 visitors, approximately one-quarter of the average of other community museums.</p> <p>The present City of Waterloo Museum mall location reportedly has over 6 million annual visitors (mall website) passing through its doors</p> <p>The mall will be a major public transit hub with an LRT station</p> <p>The space is rent free with only utility maintenance costs</p>	<p>Measures should be taken to increase attendance at the museum</p> <p>Museum operating hours could be adjusted to match traffic volumes by time of day</p> <p>Programming designed for a mall situation/clientele undertaken</p> <p>Better external and internal signage at the mall</p>
Size of Museum Operating Budget	<p>The City of Waterloo has the smallest operating budget (\$244k) for a museum in the benchmarking sample</p> <p>The City of Waterloo compared to all the other institutions in the survey provides one-fifth of the sample average funding</p>	<p>When strategic and operating plans for the museum are completed and aligned with the City priorities and resources, consideration could be given to provision of additional levels of funding for the museum</p> <p>the extent to which this strategy can be implemented and goals achieved will be influenced by available resources</p>
Staffing Levels	<p>The sample average full time staffing level was 12 including the 24 FT employees at the Waterloo Region Museum</p> <p>Eliminating the Waterloo Region Museum FT staff from the sample provides an average of 8 FT employees</p> <p>The City of Waterloo Museum had 1 FT and 2PT employees in 2015 (3FT in 2015)</p> <p>The City of Waterloo Museum's staffing is approximately one-third of the adjusted average from the survey</p>	<p>The recent move to enhance staffing will allow some extension of operating hours</p> <p>The museum may require additional levels of staffing to fully implement this strategy</p>

Area	Facts	Possible Implications
Size of the Museum	<p>The present City of Waterloo Museum location has 4,000 SF of which 1,500 SF is front-of-house (public access areas) and 2,500 SF is for back-of-house activities (administration, storage etc.)</p> <p>The average total museum space in the sample without the Waterloo Region Museum (94,000 SF) for the other 8 institutions is 23,000 SF.</p> <p>The present City of Waterloo space is just under one-fifth of the average for the other participating museums. It should be noted that the City of Waterloo Museum does not pay any rental fees.</p>	<p>The present museum space is relatively small and is not large enough to facilitate an active exhibit and programming effort</p>
Per Capita Museum Investment	<p>In 2014 the per capita investment in the museum by the City of Waterloo was \$2.45.</p> <p>The sample per capita investment in museums included in the survey was \$15.20.</p> <p>The City's museum per capita investment is less than one-fifth of the sample average.</p>	<p>The City of Waterloo among the 10 municipal jurisdictions included in the benchmarking sample was the lowest apparent investor of taxpayer funds towards museum related activities.</p>

A Note on Museums in Shopping Malls

There are only a small number of museums located in shopping malls world-wide. In Canada, the New Brunswick Museum (note that this is a provincial, not a community, museum) has been located in a shopping mall that is a renovated historical warehouse area (Market Square) in the harbour area of Saint John since 1999. This however, is not a standard 'suburban shopping mall situation'. It is very different from Conestoga Mall, as it is part of an interconnected mall complex formed by linking several heritage and commercial structures together by means of overhead bridges, and is in the heart of the downtown. Moreover, the New Brunswick museum acts as part of a larger cultural complex with the library, and other cultural facilities such as the Imperial Theatre. Conestoga Mall, on the other hand, is a purpose built facility in a suburban area, without links to other tourist-oriented or cultural sites.

There is a more extensive record of public art galleries located in shopping malls often to maintain public access during temporary periods of construction or renovation. Aquariums located in mega shopping malls are a growing trend in the United States and Europe. A few specialized museum collections are located in certain U.S. malls (ethnic heritage or automobile collections dominate). Recent major new shopping mall developments with dedicated museums have opened in Barcelona, Spain (Rock and Roll) and in Isfahan, Iran (7,000 years of Iran's history).

There are advantages and disadvantages to a museum in a shopping mall. These tend to be:

Advantages	Disadvantages
<ul style="list-style-type: none"> • free parking (in most cases) • public transit access (again, in most cases) • “built in” audience of pass-by traffic 	<ul style="list-style-type: none"> • difficulty of attracting patrons into the museum when they are busy on other errands or focused on other interests (shopping, etc.) • high rental obligations (not a factor for the City of Waterloo Museum) • often lack of proximity to other cultural attractions • lack of distinct image and identity of the museum • questionable long-term future of many mid-sized suburban shopping malls as a result of competition from stand-alone big box specialty stores, on-line shopping, etc.

3. Situation Analysis

This section of the Report contains a Situation Analysis in the form of a **Strengths, Weaknesses, Opportunities and Threats (SWOT)** assessment. First, the logic of using a SWOT assessment as the basis for a strategic plan is outlined. Next, strengths, weaknesses, opportunities and threats are presented, based upon the data collection activities described in the previous section, as well as upon the consultant and project teams judgment and expertise. Finally, the Situation Analysis section concludes with some comment on existing tools and approaches for museum management.

3.1 SWOT Assessment Approach

A SWOT assessment is a well-recognized foundational framework used to develop a strategic plan for cultural and historical resource management. It ensures that the strategy ultimately developed is grounded in a clear understanding of the advantages possessed by, and challenges and opportunities facing a community. Below we discuss first the underlying logic of a SWOT approach, then the application of this approach to this Museum and Collections Strategy.

A SWOT analysis can provide the basis for a strategic plan. Different elements (strengths, weaknesses, and so on) will logically imply different types of strategic actions and initiatives, as shown in the chart below:

	How Defined Strategically?	Strategic Actions
<i>Strengths</i>	<ul style="list-style-type: none"> unique or very strong factors that provide current advantages or benefits in the provision of services to residents and visitors 	<ul style="list-style-type: none"> protect an advantage further develop or capitalize upon an existing advantage
<i>Weaknesses</i>	<ul style="list-style-type: none"> areas of current disadvantage in the provision of services to residents and visitors 	<ul style="list-style-type: none"> strengthen areas of weakness reposition to eliminate weakness (in reality, or through the creation of alternative perceptions)
<i>Opportunities</i>	<ul style="list-style-type: none"> situations that present opportunities for future advantage or benefit 	<ul style="list-style-type: none"> feasibility testing implementation planning
<i>Threats</i>	<ul style="list-style-type: none"> situations that present dangers of future disadvantage 	<ul style="list-style-type: none"> risk assessment contingency planning

3.2 Strengths

Following are the key strengths articulated through the consultation process, and as revealed by the benchmarking exercise, for the City of Waterloo Museum.

1. **Free and available parking** – The availability of free and ample parking at Conestoga Mall was mentioned by virtually all respondents as a key strength of the museum. There are two aspects to this strength: the first, that it is free of charge (highly unusual for a museum operation) and second, that it is convenient and ample. Most times parking is within easy line-of-sight to the front door.
2. **Available ('built in') market** – Another key strength identified was the availability of patrons already at the Mall for other shopping purposes. While this may be a difficult market to tap into, given that most of those at the mall are intent on making purchases or other business, and many may not be traditional 'museum people' to begin with, a strength of the museum nonetheless is that it is located where potential markets are congregating. A related strength is the positioning of the museum within the mall itself – adjacent to the food court, which itself would draw mall patrons.
3. **Lower costs** – As a result of the arrangement between the City of Waterloo and Ivanhoe Cambridge, the City has access to its space at Conestoga Mall rent-free, the only obligation being to pay its share of utility costs. This is a considerable advantage, as the rental costs for a prime location such as this would be tens of thousands of dollars per year. Of course, as a 'tenant', even at a favorable cost advantage, the Museum does not have complete control over its surroundings and thus there may be some element of risk associated with this location in this regard (relating to image, long-term security, compatibility of surrounding uses, etc.).
4. **High exhibit rotation** – The frequency with which exhibits at the museum are rotated (on average 3 to 4 times per year) is very high relative to other community museums (which may average 1 to 2 rotations per year). This ensures that there is always something new for the public to see. (This 'retail' philosophy of always having something new to cater to a local audience fits very well with the mall location.) For community museums, which tend to rely primarily upon catering to a local market rather than acting as a tourist attraction, the ability to have high exhibit rotation must be considered as a major strength.
5. **Recent staffing increase and demonstrated council support** – The museum currently has three full-time staff, just recently (early 2015) increased from one full-time and two part-time positions. Not only does this recent staff increase recognize the positive impact that the museum has in the community, but it also reflects council's commitment to having a community museum function present in the municipality.

6. **High community regard** – The community survey has demonstrated that, of those who are aware that the City of Waterloo has a museum operation, there is very high regard for the exhibits, programs, and services that it offers.
7. **Signature Seagram collection** – The Museum holds the finest collection of artifacts from the Seagram Distillery, one of the largest distilleries in Canada, that was headquartered in Waterloo. This is a key unique resource.

3.3 Weaknesses

In undertaking a SWOT analysis, the weaknesses quadrant requires identification of the factors that place the City of Waterloo Museum at a comparative disadvantage in the marketplace. This considers other museums or potentially other options of where and what one does with one's leisure or educational time. These time/destination decisions are increasingly complex because of the growing entertainment and technology driven options and alternatives.

1. **Collection Scope** - The number of artifacts in the City of Waterloo Museum's collection is 10,000 of which the largest part (>90%) is the Seagram's collection relating the spirits and distillery story in Waterloo. When the Seagram's museum was closed in 1997, arrangements were made to donate the collection to the City of Waterloo, which at the time of the donation had a modest collection of largely municipal related items. The present collection of the City of Waterloo Museum consists of a comprehensive library of product bottles and glassware together with some distillery manufacturing equipment and related items. This represents only a small portion of the much broader "Waterloo Story" that covers several centuries of human history and a much longer natural history story. The current narrow scope of the collection constrains the ability to develop programming for various audiences. The interviews and workshops provided many suggested possible themes and collection areas to move the collection to more than "mostly bottles".
2. **Constrained Space** – The current free space (4,000 SF) in the Conestoga Mall has several constraints. It is very small for a museum and the front of the house (public space 1,500 SF) means there can only be one exhibition at a time, there is no room for a permanent exhibit, and there are significant constraints on programming and educational opportunities.
3. **Need for Additional Storage Space** – At the present time the City of Waterloo Museum requires off-site storage space for much of the collection (for which they are currently paying approximately \$5,000 per year). The collection will only be able to grow, thereby supporting the ability to tell a broader range of Waterloo stories, if more storage space is acquired. Storage will also become an issue if artifacts located in the Centre for International Governance Innovation (CIGI) owned former Seagram museum space, which is currently up for lease, need to be relocated.

4. **Location** - The location of the museum is not central to most residents of Waterloo and removed from the main urban core and other cultural amenities. The trend of most cities in North America is to concentrate cultural assets in central downtown areas².
5. **Low Awareness of Museum and Location** – It was frequently reported that in the present location the City of Waterloo Museum has a low visibility in the community and there is a limited awareness of the existence of the museum in the Conestoga Mall location.
6. **Poor Internal and External Signage** – The one external sign for the museum on the outside of the Conestoga Mall only says “Museum”. There is no further signage provided such as “City of Waterloo Museum”. Within the internal space of the mall, navigation to the museum location is challenging – the signage is small, up high and visually difficult to locate.
7. **Low Impact of Marketing, Branding and Promotion Efforts** – To address the issue of low awareness it was often stated that the museum must undertake more marketing, brand development and promotion activities including the use of social media and other contemporary techniques to attract larger and younger audiences. Special note is made for the requirement for improved branding development for the museum to provide distinctness to the museum and what it represents, especially given widespread confusion between the City of Waterloo Museum, the Region of Waterloo Museum, and THEMUSEUM.
8. **Hours of Operation** – The museum is not open for most of the time that the mall is open, leading to some frustration on the part of mall patrons who might wish to visit. This is particularly an issue on weekends and in the evenings. It should be noted that recently expanded hours of operation have been implemented.
9. **Low Attendance** – For the past several years the City of Waterloo Museum has annually attracted about 6,000 visitors (admission is free). This is a very modest level of attendance for a municipal museum in a community the size of the City of Waterloo (98,000). Many Ontario municipal museums in communities smaller and slightly larger than the City of Waterloo attract between 20,000 and 30,000 annual visitors. The Conestoga Mall reportedly has about 6 million annual visitors. This means the museum’s visitor penetration rate is less than 0.1% of mall visitors. There are several

² In this context it should be noted that traditional retail models, such as indoor shopping malls, are undergoing change as a result of the dramatic increase in on-line shopping; the rise of highly specialized ‘big box’ stores and large scale general merchandise chains (such as Costco and Walmart); outlet shopping; and retail consolidation (such as the recent closure of Target in Canada, and the Best Buy/ Future Shop consolidation). With ongoing change in the retail sector, indoor shopping malls may also see change in the years to come. This creates a very dynamic environment of change for the Waterloo Museum in its current location at Conestoga Mall.

reasons for this including the museum is not open during major mall visitation periods (evenings and weekends). Additionally, the City of Waterloo Museum is a small museum in a niche market, with other larger cultural institutions nearby.

3.4 Opportunities

Following are some of the opportunities potentially available to the City of Waterloo Museum. These have been segmented into short and long term opportunities. A number of the short-term opportunities identified arise from readdressing weaknesses identified in the previous section.

Short Term Opportunities

1. **Extend hours of operation** - As noted previously, the hours of operation for the museum are Tuesday to Friday 9:30 am to 4 pm. It is also open Saturday (9:30 am to 4 pm) and Sundays (12 to 5 pm) during July and August. Extending weekend hours for additional months throughout the year would clearly provide the community with greater access to the facility.
2. **Expand scope of the collection** - As previously noted, 'successful' museums have to decide, "what is the story or stories that we are going to tell" which in turn defines museum's collection policy that then influences what the facility requirements are going to be.

The museum would benefit by expanding the scope of its collections, through an updated collections plan and policy, to align with the new vision and mandate identified in this strategy. The collection plan should clearly articulate what is within its mandate and scope. The revised collections plan should include the historic Seagram collection and add other Waterloo specific themes and story lines. These story lines could include geological beginnings, interaction between people and the landscape, stories about agriculture and industry, innovation, entrepreneurship, collaboration, universities, culture, sports, technology and diversity. These story lines will help frame the context for permanent and temporary exhibitions. It should be noted that there may be funding requirements to facilitate an accelerated approach to increasing the collection rather than acquisition through donors as is the focus currently.

3. **Improve signage** - The museum is not particularly well signed. The City should work with mall management to improve signage within the mall. There may also be opportunities to add signage at key points on the exterior roadway system within the mall property to help first-time visitors find the museum within the mall's extensive property.
4. **Improve marketing and communications** - Recognizing the museum does not have extensive resources for marketing; the museum should do what it can to raise awareness of itself. This will require enhanced support from corporate communications staff. There may

also be opportunities to work with mall management to raise awareness of the museum on a permanent or temporary basis within the mall itself, thus increasing the number of visitors to the mall who combine shopping with a visit to the museum. This might be done through improved interior signage identified above, temporary promotions or possibly through the creation of an exhibit within the mall's more public interior space that alerts and reminds visitors to the existence of the museum and its current programming.

5. **Over time, improve online access to the collection** - This was an item highlighted in the City's Culture Plan. Improving online access to the collections will help raise the awareness of the museum and its collections both for the local community and for those who are virtual visitors. It will also help give visitors a better sense of what to expect, and if well done, gives a good impression, thus adding to the anticipated quality of the museum visitor experience.
6. **Establish greater engagement with school groups** - Museums offer important educational opportunities for the community and as schools are central places of learning, there are opportunities for schools and the museum to work together. The museum should take steps, such as working with teachers and designing exhibits and programs that can be used to enhance the school curriculum, in order to encourage increased visitation from school groups. In the longer term, and with increased resources, it may be possible to re-align resources to add staffing to work more actively with school groups. It should be noted that the current size of the museum possesses challenges for offering programming to school groups.
7. **Develop more strategic partnerships** - Currently museum staff collaborate regularly with other local museums and cultural institutions, as well as community organizations. These collaborations have contributed to high quality exhibits. The museum should consider developing additional strategic partnerships with organizations that are 'friendly' to the museum and aligned with its objectives. Partnerships could be developed for a wide variety of reasons including mounting permanent or special exhibitions, paying for school programming, hosting special events, paying for advertising and communications, as well as fundraising for capital or operating purposes. At the moment, human resource limitations pose a considerable barrier to effectively moving forward on this opportunity.
8. **Complete development the ten standards for Community Museums in Ontario** - The museum should continue to work on developing the 10 standards for community museums necessary to qualify for provincial funding through Community Museum Operating Grants. The sooner these can be completed the sooner the museum will be eligible for additional grant funding to support its operations. This need was identified in the City's Culture Plan.
9. **Seek alternative opportunities for future use of the Elam Martin Farmstead** - While there has been past exploration of opportunities to program the Elam Martin Farmstead as a heritage site displaying Mennonite farming, current assessment of the site suggests that it

would not be feasible for the city to take on such an initiative given the cost and similar sites in Waterloo Region.

By moving away from the idea that this site should be a programmed heritage site, it becomes possible to contemplate other opportunities to use this site for the benefit of the community. There is an opportunity for the municipality to develop a clear long term plan for the Farmstead as a municipal built asset that does not focus on heritage programming, but could still preserve heritage features of the site, while responding to other community needs. Consideration should also be given to the future of the family living on the site.

Longer Term Opportunities

1. **Relocate to a larger facility located in a cultural hub (or that helps create a cultural hub)** – The longer term opportunity is predicated on sufficient resources to enable a move to a larger facility with consideration given to the UpTown area of Waterloo. The move would provide expanded space and would allow for consolidation of the museum’s functions (e.g., collections, storage, exhibits, programming, administration, visitor services, etc.) into a single purpose-designed facility. Clearly, a feasibility study would need to be undertaken to investigate this opportunity in some detail to establish detailed space, staffing and resource requirements. Also, the possibility of co-locating with one or more other cultural attractions would potentially create a cultural hub and thus add to the appeal of this longer term option.

3.5 Threats

Following are some of the threats that need to be considered. Identifying these threats allows the museum and the city to assess the risks of these events occurring and to undertake contingency planning and mitigation in the event some of these threats materialize.

1. **Uncertainty regarding the Elam Martin Farmstead** – the City of Waterloo purchased the Elam Martin Farmstead property, a sixth generation Mennonite family farm, in 1999 which is on 7.5 hectares of land incorporated into RIM Park. There are 17 buildings on the site. The Martin family still lives in the farm and park visitors are discouraged from interfering with the family or farming operations. The city is responsible for maintenance of the buildings on the site. Capital requirements identified by a city report to address the identified maintenance needs are substantial. There is no clear plan regarding the future of the Elam Martin Farmstead, including the family-living on the site.

A separate assessment of capital repair requirements for the farmstead suggested that on the order of \$3.6 million (in current dollars) would be required to bring it up to a point where it would be useable by the public. Given the uncertainty with respect to

the future of this facility, as well as opportunities for future use of the site, this farmstead remains an open question at this point.

2. **Uncertainly regarding status of artifacts in the former Seagram Museum (CIGI owned building)** – The museum displays a number of small and larger objects related to the distilling industry in the former Seagram Museum. The facility is currently owned by the Centre for International Governance Innovation (CIGI) and has recently been leased to a new tenant. While the building and the interior barrel racking are protected as per the heritage designation, longer term housing of the city’s collection of artifacts is uncertain.
3. **Lack of sufficient consolidated controlled collections storage** – Some of the collection is stored off-site. Easy access is an issue and some items are stored in areas that are not climate controlled. This makes collections management inefficient and may place the artifacts at risk of deterioration in the longer term.

3.6 Assessment of Existing Tools and Approaches for Museum Management

A part of this assessment considers various tools and approaches for museum management, and the extent to which these were being embraced and utilized by the City of Waterloo Museum. The three areas for review are: 1) provincial and municipal policy frameworks; 2) existing City processes; and 3) community involvement in supporting the future direction of the museum. Each of these is addressed in turn.

Provincial Framework

Community museums across the province are strongly encouraged to adhere to the Community Museum Operating Guidelines (CMOG) standards, which the Ontario Ministry of Tourism, Culture and Sport puts forth as the ‘standard of good performance’ for museums. In fact, community museums cannot qualify for funding unless they meet CMOG guidelines, and they are evaluated annually on the basis of performance against them.

CMOG articulates 10 ‘standards’ that cover the full scope of operations for community museums. They are:

1. *Governance Standard*
2. *Finance Standard*
3. *Collections Standard*
4. *Exhibition Standard*
5. *Interpretation and Education Standard*
6. *Research Standard*
7. *Conservation Standard*
8. *Physical Plant Standard*
9. *Community Standard*

10. Human Resources Standard

These provincial standards provide an excellent ‘tool’ or ‘framework’ for community museums to follow in their own development and evolution. The City of Waterloo Museum is currently in the process of developing policies in these areas (several are in development and/or have already been approved) and this momentum should continue both to enable access to additional grant funding, but also to support operation of a high quality institution.

Municipal Framework

Section 2.1 of this Report discussed the **City’s Culture Plan** that provides an inclusive policy and strategic framework for the museum operation. The Plan endorses the important role heritage and culture have in the community, and clearly demonstrates the key role of the museum in being the delivery agency for part of the plan.

In addition, there are three other policy initiatives in the development stages that will reinforce the role of the museum and provide a strong foundation for its operations. These are:

- this plan: the **Museum and Collections Strategy**, outline in detail the vision, mission, and goals of the Museum;
- the **Built Heritage Strategy**, being developed simultaneously with this plan, which while not directed at the museum operation specifically, should reinforce its role as an interpreter of built heritage, and place where built heritage can be understood; and
- the City’s new **Strategic Plan**, approved in June 2015, which underscores the importance of culture and heritage to the life of the community, and indicates the importance of the community museum function to the city (see Section 1.5 of this Report)

In terms of a fundamental tool to guide the museum operations, however, it is clearly the Museum and Collections Strategy that will be the guiding policy; the other documents referred to above simply reinforce and support this direction of this strategy.

Existing City Processes

A number of existing museum practices and processes were reviewed while developing this strategy to identify operational and management successes and areas for improvement.

- 1. Collections data management and tracking:** The city has recently migrated to using the *PastPerfect* museum software to manage and track data on the museum collection (not without some attendant difficulties in the transition). This is a perfectly acceptable tool, and its use should be continued.
- 2. Day-to-day operations:** Our interviews with staff and stakeholders revealed no significant issues with respect to the day-to-day internal operations of the museum.

- 3. Cultural heritage resources co-managed:** As mentioned, the city is also undertaking a Built Heritage Strategy, which will be a ‘companion’ policy to the Museum and Collection Strategy. They will guide staff in taking an aligned approach to the management of all the city’s heritage resources. Another option to be considered is whether the Heritage Planner, currently a contract position, should be made permanent in order to ensure more coordinated and concerted effort on the built heritage front, as well as ensuring that this key resource is in place, enabling museum staff to work most effectively.
- 4. Education and information tools:** The consultation portion of the strategy (both interviews and the survey) revealed the desirability of an increased on-line presence of the museum. This would take the form of providing access to the on-line catalogue, as well as (in future) on-line (or virtual) exhibitions and programs. Our benchmarking review of other museums also revealed that increasingly they are providing information and education tools on-line. Accordingly, this will be a key element of the strategy to be developed.
- 5. Public confusion about the brand/mandate of institutions in the region:** The consultation process also revealed that there is a high degree of confusion between the City of Waterloo Museum, the Waterloo Region Museum, and THEMUSEUM in downtown Kitchener given the similarity in names and general lack of understanding of the different mandates among these organizations. This issue is not totally within the city’s control as contributing players in the misunderstanding are the Region and THEMUSEUM. However, rebranding the City of Waterloo Museum is within the City’s purview and this may be an option worth pursuing.
- 6. Community involvement in supporting the museum and informing future directions:** The City of Waterloo currently has an Advisory Committee on Culture, which advises Council and staff on cultural matters across the city. The scope of this committee covers arts, culture and heritage, which includes the museum operations. The museum staff does engage an ad hoc committee made up of community members and local professionals as a best practice commitment to museum operations. In future, however, when the museum pursues its longer-term vision and becomes a larger entity with a broader range of collections, exhibits, programs and events, it may be useful to consider other models such as formalizing this group into an official ‘Friends of the Museum’ group. Given that there are many models and precedents that exist, the terms of reference for, and composition of, this committee should be considered carefully. A group of community members can be a key tool staff uses on various aspects to do with the management and operation of a community museum. As well, community members can play a key role as promoters of the museum in the community, helping to spread awareness and generating interest.

Appendix A. Benchmark Comparisons 2014 Budget Year

	City of Waterloo Museum	Waterloo Region Museum	Guelph Civic Museum	Wellington County Museum & Archives	City of Niagara Falls Museum	St. Catharines Museum & Welland Canal Centre	Dufferin County Museum and Archives	Grey Roots Museum and Archives	Bruce County Museum & Cultural Centre	Chatham Kent Museum	Average Excluding City of Waterloo
Population	99,000 (permanent residents)	563,000	122,000	87,000	83,000	131,000	57,000	93,000	66,000	104,000	145,000
County or City Budget	\$172 m	\$1,300 m	\$206 m	\$85 m	\$101 m	\$112 m	\$61 m	\$52 m	\$78 m	\$300 m	\$255 m
Museum Setting	Suburban Mall	Suburban	Downtown	Rural	Downtown Commercial	Suburban	Rural	Rural	Downtown	Downtown	na
Museum Operating Budget	\$244 k (2014)	\$2.0 m	\$785 k	\$2.1 m	\$980 k	\$691 k * * Museum only – see Notes	\$1.0 m	\$1.8 m * *(includes construction debt payment)	\$1.3 m	\$351 k * * shared facility charges not included	\$1,180 k
Municipal Contribution	95%	72%	92%	92%	90%	88%	66%	85%	71%	86%	82%
Per Capita Museum Net Cost	\$2.46	\$2.55	\$5:93	\$22.30	\$10.62	\$4.31	\$11.58	\$16.45	\$14.66	\$2.90	\$15.21
Total Size Front Back (includes office and collection storage)	4,000 SF 1,700 SF 2,300 SF	94,000 SF 67,000 SF 27,000 SF	30,000 SF 18,000 SF 12,000 SF	31,000 SF 7,500 SF (Archives)	20,000 SF 10,000 SF 10,000 SF	25,000* 18,000 7100	20,000 SF 15,000 SF 5,000 SF	37,000 SF 32,000 SF 5,000 SF	40,000 25,000 15,000	4,000 SF 2,500 SF 1,500 SF	33,500 SF
5 Year Average Visitors	6,000	56,000 - 80,000	25,000 - 30,000	23,000	12,000 (Lots of local competition)	35,000 - 38,000 (Museum only)	15,000 - 20,000	39,000 - 46,000	30,000 - 35,000	6,000 - 8,000 (museum only)	29,600
Staffing FT PT Seasonal	1.0 2 0	24 1 20	6 10 10	15* 0 0 * Archives 3	7 1 5	15 4 5-7	7 3	13 3	14* (1 vacant) 6 (1 contract) * Archives 3	3 3 3 (contract)	12 FT 3 PT
Collection Size	10,000	na	32,000	19,000	24,000	150,000	na	na	na	100,000	na
Off-site Storage	Yes	No	No	No	No	No	No	No	Yes	No	na

	City of Waterloo Museum	Waterloo Region Museum	Guelph Civic Museum	Wellington County Museum & Archives	City of Niagara Falls Museum	St. Catharines Museum & Welland Canal Centre	Dufferin County Museum and Archives	Grey Roots Museum and Archives	Bruce County Museum & Cultural Centre	Chatham Kent Museum	Average Excluding City of Waterloo
Notes	Annual mall traffic is 6 million - trend ↓	<i>Pioneer village & curatorial - storage centre 35,000 SF on site</i>	<i>Seasonal McCrae House</i>		<i>Operates 3 museum sites – 2 seasonal</i>	<i>* Shared site with Welland Canal Centre - 66k to 70 k site annual site visitors – free</i>	<i>On site seasonal pioneer village</i>	<i>On site seasonal pioneer village</i>	<i>Museum plus archives, theatre and community centre roles</i>	<i>Shared site with gallery, theatre plus 2 heritage homes (seasonal)</i>	

Note: Data in this table was provided by senior staff at each of the museums. The table is intended to provide a snapshot of the context and operation of select community museums in Ontario. The data should be considered estimates and may not be directly comparable.