

Make Space

The Fort Museum

Business Plan 2021–2023

**F^{the}
FORT** 
Museum of the NWMP and
First Nations Interpretive Centre



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Strategic Focus

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Make Space for Change

This Business Plan is based on the research completed through a Sustainability Project that The Fort Museum embarked on in 2021. The project included an Operations Review, a Governance Review, and a Strategy Development process. Presented here are the Museum's **Strategic Framework** and a **Business Canvas** to aid in the implementation of the Museum's Strategy. A **Final Report** detailing the work completed, as well as the tools and research findings to aid in the implementation of this plan, is a companion to this document.

The Fort Museum Business Plan is formulated around the unique value proposition to **Make Space**. This happens through strategic change in three areas:

COMMUNITY & VISITORS

Make space for life, experiences, and learning

by enhancing the exhibit attraction and marketing the unique visitor experiences that The Fort Museum offers, and the special events and rentals that support community life and make space for the big events and everyday joys for the people of Fort Macleod and the region.

OPERATIONS & GOVERNANCE

Make space for strategic thinking and focus on The Fort Museum's most effective work by building capacity so that staff schedules can accommodate the critical leadership and development work that the Museum needs and by transitioning governance practice to oversight on that strategic level.

INCLUSION & RECONCILIATION

Make space for the community to explore the important ideas and issues The Fort Museum grapples with in telling the story of the NWMP and the Indigenous Peoples in the region. From colonialism to policing, community belonging, intercultural learning and relationships, the Museum has the opportunity in its exhibits and programming, as well as by providing a gathering space, to build relationships with Indigenous communities and to explore big questions and ideas that are grounded in reconciliation.

The Fort Museum of the NWMP and First Nations Interpretive Centre acknowledges that we are on Treaty 7 territory, the traditional territories of the Blackfoot Nation, including Siksika, Piikani, Kainai, the Tsuut'ina Nation and the Stoney Nakoda First Nations. We acknowledge all the many First Nations, Métis and Inuit who have made these lands their home.



The Fort Museum Strategic Framework

VALUES

- ⊙ We are committed to **amplifying truth** through storytelling.
- ⊙ Our strength and resilience are based in **inclusive relationships**.
- ⊙ Our **adaptability** heightens our effectiveness and efficiency when faced with change.

VISION

Making space to meaningfully connect with living history and culture.

MISSION

The Fort Museum of the NWMP and First Nations Interpretive Centre captivates and inspires its audiences through authentic storytelling, engaging experiences, and dynamic community connections.

IMPACT STATEMENTS

Health

- ⊙ The Fort visitors, staff, and volunteers feel safe and at ease.

Social

- ⊙ Community involvement in The Fort and by The Fort in the community contributes to mutually beneficial and positive social change.

Environment

- ⊙ Consistency and well-informed decisions at The Fort result in a positive public perception.

Culture

- ⊙ The Fort's relationships, programs and activities contribute to empathy and compassion, eliminating racism and cultural appropriation.

Financial

- ⊙ The Fort is a trusted institution directly contributing to the economic health of our community.

Approved by the Fort Macleod Historical Association's
Board of Directors June 10, 2021

The Fort Museum

Governance Focus

The Museum's Board of Directors is responsible for the governance of the Museum. Governance is the way in which an organization organizes its authority, decision-making, and accountability. The Board of Directors is responsible for the legal and financial oversight of the organization, and this work is accomplished through systems, policies, and processes. In support of its governance practice, The Fort Museum's Board of Directors needs to shift its focus to a strategy-level perspective, with an emphasis on providing clear direction to the Executive Director, guiding decision-making through policy and the **Strategic Framework**, and building and maintaining relationships within the community.

To implement the Strategic Framework and Business Plan at the governance level, the Sustainability Project developed several tools to support this work:

FORT MUSEUM
GOVERNANCE POLICY MANUAL

AGENDA TEMPLATE

MEETING MINUTES TEMPLATE

COMMITTEE TERMS OF REFERENCE
TEMPLATE

BOARD MOTION LOG

GOVERNANCE ACTION LOG

AGENDA BUILDING AND POLICY
MONITORING SCHEDULE

DECISION MATRIX



The Fort Museum Operational Focus

The Fort Museum runs with a small core staff and a strong complement of seasonal and temporary summer and internship positions. This provides key staffing support during the high season and fills rider, gift shop and maintenance roles — often with youth from the community. In normal operating conditions, the staff complement swells from 4 to 6 during the low season to nearly 30 in the summer.

This operating model works due to the commitment and hard work of the Museum's core staff, but the stretch on each individual position's capacity required to keep the Museum going is not sustainable in the long term. In order to address that issue, the operations structure should transition to a team-based model with a few targeted hires to free up the Executive Director and other core staffers' time to pursue the strategic shifts required to implement the Business Plan. A team-based model with additional capacity will result in more time for relationship building, partnerships, and program development, as well as for securing the revenue needed to advance the Museum's Strategic Framework.



STRATEGIC LEADERSHIP

GOVERNANCE

Board of Directors

OPERATIONS

Executive Director

FACILITIES & LIVESTOCK

Maintenance & Livestock Manager
Maintenance Summer Staff

MUSICAL RIDE

NWMP Ride Sergeant
Corporal, Constable, Sub-Constable
Troopers

PROGRAMMING

Programs & Events Coordinator
Seasonal Interpreters

COLLECTIONS & CURATORIAL

Collections Manager
Collections Internships
Research & Exhibits Outreach

ENTERPRISES

Administrative Assistant
Marketing Coordinator
Gift Shop Supervisor
Gift Shop Staff





Museums, Tourism, and the COVID-19 Factor

Museums in Alberta are operating in a truncated summer season, and further closures are not yet out of the question. When the Museum opens, the building and site capacity limitations may continue to have an adverse impact on the Museum's potential to generate earned revenue from admissions, the musical ride add-ons, and related income from gift shop purchases and on-site donations. On the other side of the equation, an anticipated domestic tourism boom may counteract or mitigate some of the negative revenue impact as restrictions ease.

It remains too early to know how long or strong the summer season will be for Alberta museums in 2021.

The Fort Museum Operational Structure

Key additions can be implemented — ideally in the order delineated below — beginning after the Museum opens for the summer of 2021, acknowledging that the Museum may need grant support and several months of operating revenue in order to provide both the capital required to add staff and the certainty needed to know that revenue predictions made in the 2021 budget are accurate and can be relied upon to make staffing commitments in a pandemic environment.

MAINTENANCE & LIVESTOCK MANAGER:

- ⊙ Building maintenance, facility and grounds set-up as event support, main provider of care for livestock

PROGRAMMING & EVENTS COORDINATOR:

- ⊙ Grow the programming for schools and clubs, organize community events, facilitate rentals

RESEARCH & EXHIBITS OUTREACH:

- ⊙ Community liaison with Indigenous Nations, facilitate the development of Indigenous-led exhibitions, organize community-based exhibitions, and participate in community events (possible shared position with partners)

MARKETING COORDINATOR:

- ⊙ Work with tourism providers to partner on regional promotion, promote museum events and experiences, provide grant-writing support (possible shared position with partners)

These additions would increase the core staff complement, reinstating positions the Museum used to have, with some modest growth. Some of these may be best-suited to contract rather than staff positions and can be part-time or even shared positions with other organizations. For example, the marketing position could also be an asset to the Cultural Heritage Tourism Alliance partnership or the Research and Exhibits Outreach position could be jointly supported by the Museum and a partner Indigenous cultural group, Nation, or Nations if shared goals are established. Staffing and operations support may remain available as the pandemic recovery occurs and staffing grants can also be used.

The Fort Museum

Financial Focus

The Museum's financial sustainability coming out of the pandemic environment is front of mind for the Museum's leadership and stakeholders. The Business Model presented in the Canvas included in this plan is designed to drive revenue to fund the Museum's operating expenses and mission-based activities. A sample budget, aligned to the strategy presented here, is included, with considerations to the following changes in approach:

- ⦿ Staffing increases are included to **increase capacity of core staff** to carry out the strategy and implementation of the Business Plan.
- ⦿ Adding marketing support also includes the addition of grant-writing experience to **augment the capacity of core staff**, who have an excellent record in securing public support but who could spend more time on the Museum's program and service offering.
- ⦿ **Financial information is arranged to tell a more strategic story** about the organization's financial condition and to support decision-making and priority-setting.
- ⦿ Existing programs are reviewed to **determine revenue generation** potential beyond covering costs.
- ⦿ The **potential to generate revenue** has to be a key factor in the approval of any new program, event, or activity over the next several years.
- ⦿ **Fund development, specifically including philanthropy and sponsorships, needs to be a focus over the next two years.** From identifying existing programs and events for sponsorship potential to development of a fund development plan that stewards donor contributions on an ongoing basis to the Museum, community support is key to the viability of the Fort Museum.



Applying the Strategy to the Operations Budget

REVENUE		2022	Notes
GRANTS AND PUBLIC SUPPORT	Town of Fort Macleod Grant	\$ 125,000	
	Canada Summer Jobs Grant	\$ 100,000	
	Alberta Museums Association	\$ 35,000	Operational Staffing and Professional Development Grants
	Government of Alberta	\$ 15,600	Support for the Barracks site
	CIP (Alberta) and/or Department of Canadian Heritage	\$ 50,000	Development of Indigenous heritage programs with local communities
	Wage Subsidies	—	Not anticipated in 2022
	Casino Funds	\$ 5,000	Estimated 2022 allocation
	Other Grants (MD and Government of Canada)	\$ 3,000	Canada Day
	FCSS Grant	\$ 5,000	Red Coat Program
	Young Canada Works Grant	\$ 6,000	Summer Programming Staff
	Foundation Support	\$ 20,000	Program Coordinator
EARNED REVENUE	Admissions	\$ 25,000	
	Admissions: Musical Ride	\$ 5,000	
	Admissions: Red Coat Program	\$ 4,500	
	Rent from the Barracks	\$ 2,500	
	Collections Revenue – Archives and Research	\$ 1,000	
	Facility Rental	\$ 1,000	
	Gift Shop Sales	\$ 20,000	
	Groom a Horse Program	\$ 2,000	
	Memberships	\$ 1,000	
COMMUNITY SUPPORT AND PHILANTHROPY	Donations and Fundraising	\$ 15,000	
	Sponsorship	\$ 5,000	
	Partnerships	\$ 5,000	
	Annual Campaign	\$ 5,000	
	GROSS REVENUE	\$ 456,600	
COST OF GOODS SOLD	Gift Shop Stock Purchases	\$ 10,000	
	TOTAL NET REVENUE	\$ 446,600	

EXPENSES		2022	Notes
OPERATIONS			
Administration	Bookkeeping	\$ 9,800	
	Memberships and Registrations	\$ 1,500	
	Office Expenses	\$ 3,000	
	Telephone	\$ 3,350	
	Travel Expenses	—	
	Vehicle Expenses (Off-Season)	\$ 600	
Human Resources	Salaries and Employment Costs	\$ 340,690	
Marketing and Communications	Advertising and Promotion	\$ 3,000	
	Conventions, Trade Shows, and Meetings	\$ 500	
Bank	Interest, POS Fees, and Exchange	\$ 1,750	
Facility Maintenance	Building Repairs and Maintenance	\$ 6,500	
	Grounds Maintenance and Development	\$ 5,000	
	Janitorial Supplies	\$ 2,500	
	Security and Alarm Monitoring	\$ 1,160	
	Snow Removal / Groundskeeper: the Barracks	\$ 4,500	
	Storage Bunker Rental	—	
Utilities	Utilities	\$ 21,500	
GOVERNANCE			
Governance Activity	Accounting (Year-End)	\$ 4,750	
	Insurance	\$ 9,800	
MUSEUM FUNCTIONS			
Collections Management	Collections Supplies and Materials	\$ 1,000	
Exhibitions	Exhibit Supplies and Materials	\$ 1,500	
	Travelling Exhibit Hosting Fees	\$ 1,000	
Education Programming	Education Programming Supplies and Materials	\$ 500	
Public Programming	Public Program Supplies and Materials	\$ 3,000	
	Musical Ride Supplies and Maintenance	\$ 19,700	
TOTAL GROSS EXPENSES		\$ 446,600	
NET SURPLUS / (DEFICIT)		\$ 0	

Strategic Focus

The Fort Museum Business Model Canvas

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Key Partnerships

Community & Civic Partners

- Town of Fort Macleod
- Chamber of Commerce
- Cultural Heritage Tourism Alliance
- RCMP
- Schools
- Museums (travelling exhibits, tourism, collaborations)
- Library
- Visitor Information Centre (Travel Alberta)
- Indigenous Nations and communities: Kainai, Piikani, and Siksika
- Elders
- Heritage and livestock contractors (wheelwright, veterinarian, farrier)
- Feed suppliers
- Horsesitter
- Scougall Motors
- Local grocery stores
- Fort Macleod Gazette
- Family members (helping out)
- Volunteers

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Key Activities

Living, Artifact & Archival Collections

- Caring for horses and goats
- Archives
- Preservation
- Collections management
- Storage
- Artifact-based programming (online and on-site)

Exhibitions

- Permanent exhibit updates
- Temporary and travelling exhibits
- Research
- Research requests
- Exhibit development research

Programs

- Musical Ride
- March of the Red Coats
- Groom a Horse
- Travelling exhibits
- Guided museum tours
- Bus tours and tourism industry partnerships
- Virtual field trip
- Virtual walking tour of Fort Macleod and The Fort Museum

Events

- Canada Day
- Halloween Haunted House
- Heritage Days
- Ride through the Ages
- Santa Claus Parade
- Taste of Fort Macleod
- Antique Show
- Visitor event rentals
- Antique Show booth

Marketing & Advancement

- Online presence
- Cultural Heritage Tourism Alliance (CHTA) partnership
- CHTA Ambassador Program
- Teachers' Conventions
- Adopt an Artifact fundraiser
- FAM tours
- Rendez-vous Canada and Canada West Marketplace Conventions
- Grant writing and relationships
- Sponsorship activities
- Fundraisers and draws
- Visitor Information Centre
- Gift Shop

2

Unique Value Proposition

Make Space...

The Fort Museum makes space for everyone...

... for learning

... for truth

... for spending time with friends and family

... to experience history

... to be inspired

... to meet

... to celebrate life's big events and everyday joys

... to have fun

... to be a community

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Key Resources

Human Resources

- Hard-working and qualified staff
- Volunteer Board of Directors
- Volunteers and specialty donated services
- Contractors and seasonal staff

Funders & In-kind Support

- Town of Fort Macleod
- Alberta Museums Association
- Community Foundation of Lethbridge and Southern Alberta
- Government of Alberta: CIP, CFEP

- Community Foundations of Canada
- Government of Canada: CSJ, YCW, MAP
- Documentary Heritage Community Program
- Travel Alberta
- Local businesses
- Donors
- Sponsors
- Chamber of Commerce
- Family and Community Support Services
- Alberta Culture, Multiculturalism, and Status of Women

Assets: Heritage, Tangible & Intangible

- Artifact and archival collections
- Elder and Knowledge Keeper sharing
- Fort site and the Barracks
- Location in Southern Alberta tourist corridor
- Unique story and experience
- Research and history resources
- Strong local supporters
- Recognized Museum designation
- Access to professional and industry expertise (museums, archives, tourism, agriculture)

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Cost Structure

Fixed Costs

- Core staffing
- Facility maintenance
- Livestock care
- Administration (office, technology, banking, insurance)
- Governance (audit, legal, insurance)
- Utilities
- Core Museum functions (exhibit, collection costs)

Variable Costs

- Project-based and seasonal staffing
- Marketing and communications
- Projects
- Program materials and supplies
- Events
- Gift Shop inventory

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- ... to be a community

4 Customer Relationships

Community Champions & Connectors

A LOVE FOR THE LOCAL

- ⊙ Foster a feeling that The Fort Museum is a space where life happens: events, meetings, community and family celebrations, youth employer
- ⊙ Deepen a love for hometown experiences and pride in the community
- ⊙ Become the space residents of Fort Macleod and the surrounding region take out-of-town guests for a special day out
- ⊙ Build personal relationships with the history of the area – with all its layers
- ⊙ Partner in the local economy: tourism driver; attraction for shoppers, diners, and hospitality and service customers; youth employer; and trusted partner

Destination Seekers

OUT OF THE ORDINARY EXPERIENCES

- ⊙ Sharing unique personal experiences
- ⊙ Nurturing opportunities to learn more about the people of Treaty 7 and Southern Alberta
- ⊙ Creating fun and interesting heritage experiences
- ⊙ Providing a chance to do, see, or participate in something different

Co-creators & Learners

SPACE TO EXPLORE IMPORTANT IDEAS

- ⊙ Co-created and truth-based
- ⊙ Grounded in traditional knowledge and careful research
- ⊙ Safe space to talk and learn about what matters in the community
- ⊙ Sharing of Indigenous history and culture in Indigenous voices, under Indigenous leadership, and approached in the spirit of reconciliation

3 Channels

- ⊙ Presence on social media and news platforms where locals get their information
- ⊙ Presence at local events and gatherings
- ⊙ Strong sponsor and corporate partner package and strategy
- ⊙ Effective communication strategies that support programs and improve event attendance
- ⊙ Active online presence: user-friendly website, partnerships with tourism drivers and influencers
- ⊙ Strong rankings on crowdsourced traveller platforms
- ⊙ Networks with other museums, attractions, and tourism industry partners
- ⊙ Online resources for teachers and learners
- ⊙ Participation in important community conversations
- ⊙ Relationships with reconciliation partners

1 Customer Segments

Community Champions & Connectors

- ⊙ Local families
- ⊙ Day-out activity planners
- ⊙ Preschools and daycares
- ⊙ Newcomers
- ⊙ Clubs and community groups
- ⊙ Venue for community and family events
- ⊙ Venue seekers for local events and meetings
- ⊙ Fort Macleod community organizers
- ⊙ NWMP Commemorative Association
- ⊙ RCMP veterans and current members

Destination Seekers

- ⊙ Tour operators and groups
- ⊙ Regional and local explorers
- ⊙ Alberta and BC tourists
- ⊙ Canadian and US tourists
- ⊙ International tourists
- ⊙ Seniors groups
- ⊙ Learners about Indigenous history and culture
- ⊙ Horse enthusiasts
- ⊙ NWMP and RCMP enthusiasts
- ⊙ Hospitality industry value-adds
- ⊙ Celebrities and film and movie industry

Co-creators & Learners

- ⊙ Deep learners and change-makers
- ⊙ Reconciliation partners
- ⊙ Indigenous Nations and communities
- ⊙ School field trips and in-class lessons
- ⊙ Homeschool families
- ⊙ Researchers
- ⊙ Postsecondary institutions: University of Lethbridge, University of Calgary, Simon Fraser University

5 Revenue Streams

Grants & Public Support

- ⊙ Town of Fort Macleod operating funds
- ⊙ Young Canada Works, Canada Summer Jobs grants, and other student funding programs
- ⊙ Department of Canadian Heritage grants
- ⊙ Alberta Museums Association grants
- ⊙ Community Foundation of Lethbridge and Southern Alberta
- ⊙ Casino and gaming funds
- ⊙ Family and Community Support Services
- ⊙ Local and specialty grants

Earned Revenue Streams

- ⊙ Gift Shop and online store sales
- ⊙ Musical Ride and Museum admissions
- ⊙ Program and event fees
- ⊙ Event hospitality and food sales
- ⊙ Research fees
- ⊙ Facility rentals
- ⊙ Add-on experience fees

Community Support & Philanthropy

- ⊙ Sponsorships
- ⊙ In-kind business community support
- ⊙ Membership sales
- ⊙ Donations (at Museum and online)
- ⊙ Fundraising event profits
- ⊙ Philanthropy, including annual giving campaign, bequests, and planned giving

Business Model Narrative: Unpacking the Canvas

1 Customer Segments

Community Champions & Connectors

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The Museum's visitors, community, and partners all use the Museum differently. Grouping those users into customer segments that have similarities in what they need and expect from the Museum helps the Museum to understand how its activities create value for those users and how that impacts the revenue generated for the Museum. In the museum world, we think about these groupings as *audiences* rather than customer segments, and we know there are many other factors at play when it comes to meeting audience needs and serving community. Applying this knowledge makes the user's interaction with the Museum that much richer and deepens and grows the Museum's relationship with each and every individual with whom the Museum engages.

When looking at the Museum's operations from the perspective of how the Museum leverages its assets to create value and generate revenue, thinking about these groupings as customer segments is helpful.

COMMUNITY CHAMPIONS & CONNECTORS are the locals who are building their lives and livelihoods in Fort Macleod. They are the community organizers who plan events and activities, who volunteer for clubs, sports, and service organizations, and who make decisions for their families — especially around spending and schedules. They are business owners and employees who work for companies locally that benefit from a strong tourism sector, a thriving local economy, and the quality of life boost that industry benefits from when recruiting and retaining workers. Maybe their family has been in the area for generations or maybe they just arrived for work; either way, they are looking for a space in which to spend time with family and friends, to try something new or partake of an old tradition, and they show up for community events. They will invest in their community either for the benefit it brings for them personally or professionally or because they see it as part of building community.

Community Champions & Connectors use the Museum as a vector for community life.

DESTINATION SEEKERS include tourists to Fort Macleod and the Southern Alberta region from Alberta, Canada, the US, and the rest of the world. They want to see the sites and experience the local culture and history, and the Museum is probably not their only stop on their adventure. Destination seekers will go home with a souvenir, they need food and beverage to be either a part of the experience or easy to fit into their travel schedule, and they probably want to share their experience with friends and family back home, so social media friendly opportunities are important. There are some unique characteristics for this customer segment that differentiate them from tourists to other areas: they may be particularly interested in learning about Indigenous history and culture, and they may have been drawn to the area by one of the bigger cultural experiences — especially Head-Smashed-In Buffalo Jump UNESCO World Heritage Site. Additionally, the movie and film industry in the region draws celebrities and movie industry workers and fans.

Destination seekers use the Museum for a memorable experience.

CO-CREATORS & LEARNERS are a distinct audience grouping, defined by a desire to learn or teach or to understand a big idea. This group includes the schools that visit the Museum for field trips and those that do not yet do so but who are in the region, as well as homeschool families and groups. University and independent researchers access the archives and collections to advance their studies or projects. The Fort Museum collects and shares the history of the NWMP, the Indigenous Peoples of the region, and the town of Fort Macleod. Exploring this history is the reason that schools and researchers visit the Museum. Sharing complex histories, as The Fort Museum does, takes a continuous investment in the research and relationships that ensure truth, authenticity, and depth in the Museum's exhibits and programming. This is grounded in nurturing strong relationships with the region's Indigenous Nations. It also means staying engaged in the issues and ideas that define Fort Macleod, especially as it relates to history, culture, and belonging. Co-creating learning opportunities with Indigenous communities and individuals, and those working to strengthen the social fabric of Fort Macleod, is key to meeting the needs of the learners who visit the Museum.

Co-creators & Learners use the Museum to dig deeper into history and culture.



2 Unique Value Proposition

Make Space...

The Fort Museum makes space for everyone...

- ... for learning
- ... for truth
- ... for spending time with friends and family
- ... to experience history
- ... to be inspired
- ... to meet
- ... to celebrate life's big events and everyday joys
- ... to have fun
- ... to be a community

A Unique Value Proposition (UVP) defines a museum's promise of value to be delivered to its customers. Understanding a museum's UVP as it relates to each of the customer segments helps a museum to make good decisions about what programs, events, and activities will be successful and how to position and market them to make it clear to each customer segment what the Museum can do for them.

The Fort Museum can offer each of its customer segments space — both physically and symbolically. For the **COMMUNITY CHAMPIONS & CONNECTORS**, the Museum is an opportunity to make space for family and friends, for traditions and celebrations, and for attracting others to the community who will also visit local businesses and support jobs and livelihoods. The Museum is also a physical space that can be rented for community meetings and events, and for clubs and groups to use or visit in support of their own objectives.

DESTINATION SEEKERS are making space for fun, experiences, and learning in their travel schedules and leisure time, and the Museum is just the space for them. A great day out or a fun and unique stop on a larger adventure is the offer for these visitors, whether they are from a nearby community or the other side of the globe.

CO-CREATORS & LEARNERS find space at the Museum to explore important ideas and issues — safe space, inclusive space, ethical space. Again, the Museum's physical space is part of the value proposition: there is room to explore, to meet with others, and to experience a living history in a way that a display case, book, or website won't allow.

Ethical space is formed when two societies, with disparate worldviews, are poised to engage each other. It is the thought about diverse societies and the space in between them that contributes to the development of a framework for dialogue between human communities.

— Summarized from Elder Willie Ermine, "The Ethical Space of Engagement," *Indigenous Law Journal*, 6:1 (2007): 193–203.



Building and maintaining ethical space, and safe and inclusive spaces for critical conversations and deep learning and listening, is a journey. It is based in relationships and takes intentional and thoughtful action to build. Because the Museum is a keeper and communicator of Indigenous history, approaching this work in the spirit of reconciliation is not only the ethical imperative of historians and heritage workers, it is also an opportunity to positively impact the community by tackling racism and building an inclusive community. The Museum has identified bold goals and a leadership role for themselves in the community. They have also started the conversation by acknowledging that there is a long way to go and that they have learning to do. This work begins with building on relationships with the region's Indigenous Nations, listening to and learning from Elders, and making space for Indigenous voices to tell their own stories.



3

Channels

- ⊙ Presence on social media and news platforms where locals get their information
- ⊙ Presence at local events and gatherings
- ⊙ Strong sponsor and corporate partner package and strategy
- ⊙ Effective communication strategies that support programs and improve event attendance
- ⊙ Active online presence: user-friendly website, partnerships with tourism drivers and influencers
- ⊙ Strong rankings on crowdsourced traveller platforms
- ⊙ Networks with other museums, attractions, and tourism industry partners
- ⊙ Online resources for teachers and learners
- ⊙ Participation in important community conversations
- ⊙ Relationships with reconciliation partners

Channels are the tactics and strategies the Museum uses to reach each customer segment from first contact, to booking a visit or ticket, to turning that transaction into a repeat event or one shared with others. The Museum has a strong online presence and key relationships that bring visitors to their doorstep. Intentionally and strategically building on the Museum's existing networks, to add depth and reach, is key to expanding the Museum's connection with its target customer segments. Tourism industry influencers and partners, local business partners and employers, cultural and heritage attractions and workers, and educators are all key facilitators for strengthening the Museum's channels.



Several of the staffing changes suggested for the Museum are meant to make space for the Museum's team to build networks and invest in opportunities to increase the Museum's profile locally, with tourism partners and with communities and organizations who have a shared mission goal to facilitate learning and community development. Being a part of the community life in Fort MacLeod and the region, including attending public events at neighbouring Nations, shows the larger community that the Museum is a partner. The Museum can and should invest in keeping its online profile strong, its communication networks current and active, and its customer service activities top quality. All of these important building blocks can be leveraged for wider reach if they are added to those of tourism industry partners, other museums and attractions, local traditional and social media and communication networks, and the professional and special interest networks of others. These take time and legwork to establish and maintain; adding capacity through a marketing coordinator would have a direct impact here and adding other supports to free the Executive Director to focus on advancing the Business Plan, strategic relationships, and mutually beneficial partnerships is also key.

4 Customer Relationships

Community Champions & Connectors

A LOVE FOR THE LOCAL

- ⊙ Foster a feeling that The Fort Museum is a space where life happens: events, meetings, community and family celebrations, youth employer
- ⊙ Deepen a love for hometown experiences and pride in the community
- ⊙ Become *the* space residents of Fort Macleod and the surrounding region take out-of-town guests for a special day out
- ⊙ Build personal relationships with the history of the area – with all its layers
- ⊙ Partner in the local economy: tourism driver; attraction for shoppers, diners, and hospitality and service customers; youth employer; and trusted partner

Destination Seekers

OUT OF THE ORDINARY EXPERIENCES

- ⊙ Sharing unique personal experiences
- ⊙ Nurturing opportunities to learn more about the people of Treaty 7 and Southern Alberta
- ⊙ Creating fun and interesting heritage experiences
- ⊙ Providing a chance to do, see, or participate in something different

Co-creators & Learners

SPACE TO EXPLORE IMPORTANT IDEAS

- ⊙ Co-created and truth-based
- ⊙ Grounded in traditional knowledge and careful research
- ⊙ Safe space to talk and learn about what matters in the community
- ⊙ Sharing of Indigenous history and culture in Indigenous voices, under Indigenous leadership, and approached in the spirit of reconciliation

Positive customer relations are the key for turning a one-time visitor encounter with the Museum into a loyal visitor, champion, word-spreader, member, follower, donor, volunteer, influencer, and/or connector. They are value-based — an alignment around a shared mission or goal, a shared audience, or a commercial interest that has a mutual revenue advantage for the Museum — and they are reinforced through customer service, communications and marketing, and reliable, quality delivery on the value proposition the Museum is offering.

For COMMUNITY CHAMPIONS & CONNECTORS

that value is a **love for the local**. The Museum can build these customer relationships by positioning events and activities to this audience around that shared value and the mutual benefit they bring for the community. Additionally, developing a communications strategy around building profile for Museum events and rental spaces geared to a local audience will keep the Museum front of mind. Delivering great events and providing a strong and responsive customer service offering around rentals fosters loyal supporters in the community.

If **DESTINATION SEEKERS** have an **out-of-the-ordinary experience** at the Museum, they may be back to visit again, but if they are from far away, the relationship with the tourism market is built through tourism operators and partners who make The Fort Museum a must-see in their promotional and booking activities. With the tourists themselves, the relationship is built through creating memorable and sharable experiences that bring friends and acquaintances to the Museum through social media presence and word of mouth. The logistics of the visitor experience matter more for this crowd; clean washrooms, a place to change children in all washrooms, picnic tables, a safe experience following pandemic or pandemic-recovery protocols, places to get food, drinks and emergency snacks, and flexible or predictable timing for programming can make or break an otherwise great heritage experience.

CO-CREATORS & LEARNERS are looking for a **space to explore important ideas** that is anchored with depth and credibility in their relationship with the Museum. A Museum field trip should be fun, the customer service offered to researchers should be strong, and the meeting spaces should be professionally managed. But what this segment really wants are opportunities to engage with history that are truth-based, well-researched, grounded in traditional knowledge, shared from all relevant perspectives, and shared in a way that learners can contend with and dig deeper to understand ideas. Links to curriculum are key with school and homeschool visitors so that teacher objectives are met.

5 Revenue Streams

Grants & Public Support

- ⊙ Town of Fort Macleod operating funds
- ⊙ Young Canada Works, Canada Summer Jobs grants, and other student funding programs
- ⊙ Department of Canadian Heritage grants
- ⊙ Alberta Museums Association grants
- ⊙ Community Foundation of Lethbridge and Southern Alberta
- ⊙ Casino and gaming funds
- ⊙ Family and Community Support Services
- ⊙ Local and speciality grants

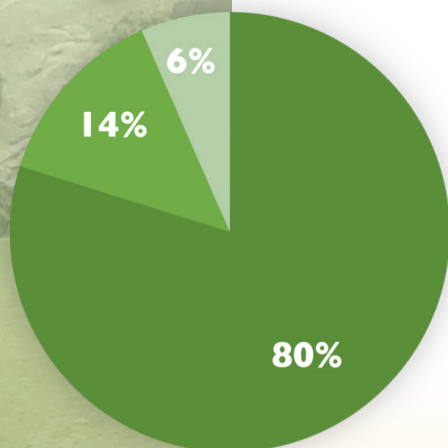
Earned Revenue Streams

- ⊙ Gift Shop and online store sales
- ⊙ Musical Ride and Museum admissions
- ⊙ Program and event fees
- ⊙ Event hospitality and food sales
- ⊙ Research fees
- ⊙ Facility rentals
- ⊙ Add-on experience fees

Community Support & Philanthropy

- ⊙ Sponsorships
- ⊙ In-kind business community support
- ⊙ Membership sales
- ⊙ Donations (at Museum and online)
- ⊙ Fundraising event profits
- ⊙ Philanthropy, including annual giving campaign, bequests, and planned giving

The Museum has very strong public support and room to grow earned revenues and community and philanthropic support. These revenue streams have been difficult in the pandemic environment but will rebound in time after pandemic conditions lift. The domestic tourism boom expected in 2021 and 2022 will be an opportunity that The Fort Museum should be prepared to capitalize on and use as an opportunity to build lasting relationships, strengthening revenue streams resulting from the tourist audience in the long term. **Diversified revenue streams are critical to non-profit sustainability to support navigation of volatile economic and political conditions.**



THE FORT MUSEUM REVENUE SUMMARY PROPOSED

80%	GRANTS & PUBLIC SUPPORT
14%	EARNED REVENUE
6%	COMMUNITY SUPPORT & PHILANTHROPY



The staffing additions and shifts suggested in the Plan are intended to grow the earned revenue and community and philanthropic support streams through strengthened relationships with community and partnerships and marketing to grow the Museum's tourism-driven revenue. The additional capacity will also help the Museum to maintain the public support they receive from all levels of government and community foundations. The goal is that the Museum grows the pie, rather than redistributing efforts from generating one type of revenue to another.

6 Key Resources

Human Resources

- Hard-working and qualified staff
- Volunteer Board of Directors
- Volunteers and specialty donated services
- Contractors and seasonal staff

Funders & In-kind Support

- Town of Fort Macleod
- Alberta Museums Association
- Community Foundation of Lethbridge and Southern Alberta
- Government of Alberta: CIP, CFEP

- Community Foundations of Canada
- Government of Canada: CSJ, YCW, MAP
- Documentary Heritage Community Program
- Travel Alberta
- Local businesses
- Donors
- Sponsors
- Chamber of Commerce
- Family and Community Support Services
- Alberta Culture, Multiculturalism, and Status of Women

Assets: Heritage, Tangible & Intangible

- Artifact and archival collections
- Elder and Knowledge Keeper sharing
- Fort site and the Barracks
- Location in Southern Alberta tourist corridor
- Unique story and experience
- Research and history resources
- Strong local supporters
- Recognized Museum designation
- Access to professional and industry expertise (museums, archives, tourism, agriculture)

Resources are the **tangible and intangible assets, the relationships and knowledge that the Museum has, or has access to, that allow the Museum to deliver on its value proposition and achieve its goals.** Some of these resources show up in the Museum's financial statements. Others are the social capital within the Museum and in the community that allows the work to happen. When the Museum makes decisions about how to leverage its resources, it is important to look at more than the bank balance. Resources include money, time, people, knowledge, material assets and supplies, and infrastructure and technology. Each of these is needed for the Museum to be successful, and each of them should be critically applied to the Museum's activities, acknowledging the value and cost they each hold. Time in particular is often undervalued in non-profits, and The Fort Museum is no exception. Making intentional decisions about the best use of human resources — paid and unpaid — bolsters not only the bottom line but also the Museum's ability to be effective in achieving its mission.

The Museum's collections, archives, research base, and relationships with Elders and Knowledge Keepers and academic institutions are likewise assets that can be deployed to strengthen a multifaceted heritage experience and to support reconciliation and inclusion work in the community.



Use the Financial Matrix analysis completed during this project to determine if resources — including staff time — are being deployed in a way that supports a holistic balance between mission impact and revenue so that the Museum's resources are being managed in a sustainable way.

Take advantage of your location. The Museum is situated in a tourism corridor and tells an important part of a story that is best shared with stops at Head-Smashed-In Buffalo Jump UNESCO World Heritage Site, The Fort Museum, and Blackfoot Crossing Historical Park, as well as other regional cultural and heritage institutions.



7 Key Activities

Living, Artifact & Archival Collections

- ⊙ Caring for horses and goats
- ⊙ Archives
- ⊙ Preservation
- ⊙ Collections management
- ⊙ Storage
- ⊙ Artifact-based programming (online and on-site)

Exhibitions

- ⊙ Permanent exhibit updates
- ⊙ Temporary and travelling exhibits
- ⊙ Research
- ⊙ Research requests
- ⊙ Exhibit development research

Programs

- ⊙ Musical Ride
- ⊙ March of the Red Coats
- ⊙ Groom a Horse
- ⊙ Travelling exhibits
- ⊙ Guided museum tours
- ⊙ Bus tours and tourism industry partnerships
- ⊙ Virtual field trip
- ⊙ Virtual walking tour of Fort Macleod and The Fort Museum

Events

- ⊙ Canada Day
- ⊙ Halloween Haunted House
- ⊙ Heritage Days
- ⊙ Ride through the Ages
- ⊙ Santa Claus Parade
- ⊙ Taste of Fort Macleod
- ⊙ Antique Show
- ⊙ Visitor event rentals
- ⊙ Antique Show booth

Marketing & Advancement

- ⊙ Online presence
- ⊙ Cultural Heritage Tourism Alliance (CHTA) partnership
- ⊙ CHTA Ambassador Program
- ⊙ Teachers' Conventions
- ⊙ Adopt an Artifact fundraiser
- ⊙ FAM tours
- ⊙ Rendez-vous Canada and Canada West Marketplace Conventions
- ⊙ Grant writing and relationships
- ⊙ Sponsorship activities
- ⊙ Fundraisers and draws
- ⊙ Visitor Information Centre
- ⊙ Gift Shop

The Museum's Key Activities are the work it does on a day-to-day basis. These are the programs and events offered, the care and management of the collection and the livestock, research and development work, and the management of the Museum's strategy and facilities. These activities result in the products and services the Museum can offer its customer segments. The Fort Museum has been diligent about developing a program and event offering that is focused and manageable. **Exhibit development** is a key activity that the Museum has flagged as a priority to strengthen.



Evolving the program, event, and service offering to meet the evolving needs of the Museum's customer segments will be important in the long term. But beyond the routine strategic adjustments, the Museum's short-term priority is not doing more or different activities; it is about promoting and strengthening those activities it already does and making space for community-led initiatives to emerge and be implemented. Ensure that the Destination Seekers know that they can expect a fun and engaging activity. Staying relevant to the Community Champions & Connectors and the Co-creators & Learners is about responsiveness and making sure that these groups know they have the ability to shape the Museum's activities. It is also important that they understand that their support and investments of time and admission and program fees, sponsorships, and philanthropic support directly impact the activities that they benefit from and enjoy.

8

Key Partnerships

Community & Civic Partners

- Town of Fort Macleod
- Chamber of Commerce
- Cultural Heritage Tourism Alliance
- RCMP
- Schools
- Museums (travelling exhibits, tourism, collaborations)
- Library
- Visitor Information Centre (Travel Alberta)
- Indigenous Nations and communities: Kainai, Piikani, and Siksika
- Elders
- Heritage and livestock contractors (wheelwright, veterinarian, farrier)
- Feed suppliers
- Horsesitter
- Scougall Motors
- Local grocery stores
- Fort Macleod Gazette
- Family members (helping out)
- Volunteers

Partnerships are the network that allows the Museum to benefit from the capacity of others and to lend their capacity to the mutual benefit of those same individuals, groups, and organizations. The Museum has a network to support its work, and often when museums struggle with sustainability, it is evidence of the lack of a healthy network of partners. The Fort Museum knows that partnerships and relationships are the backbone of their Business Model. This is part of the organization's DNA. Building on this strength, the organization can move toward strategically deepening the partnerships that are critical to advancing the Strategic Framework and to implementing the Business Plan with each of the customer segments identified.

Partnerships must have a mutual benefit to be effective; this benefit might be in a strategic alliance to access an audience or enhance a program or product offering, it might be a commercial relationship where the Museum pays for services, or it might be a joint project where both organizations can pool their resources to advance their goals. In a non-profit setting, partnerships might generate an intangible benefit such as community development, advancement of values, professional skills acquisition, or personal growth or satisfaction — especially for volunteers and donors. Understand the nature of the relationships with your partners and what the benefits are, and lean into those where that investment provides a key resource or a strategic advantage for the Museum and results in a rewarding experience for your partners.



9 Cost Structure

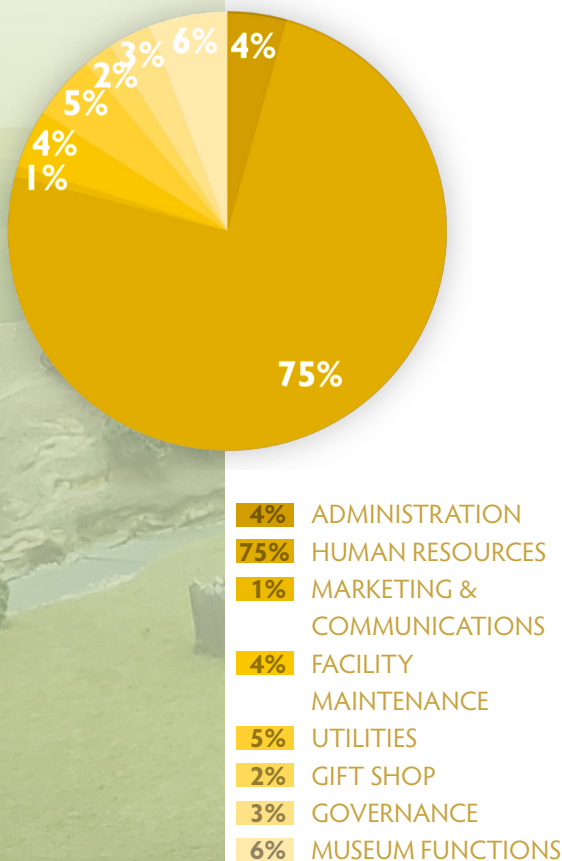
Fixed Costs

- Core staffing
- Facility maintenance
- Livestock care
- Administration (office, technology, banking, insurance)
- Governance (audit, legal, insurance)
- Utilities
- Core Museum functions (exhibit, collection costs)

Variable Costs

- Project-based and seasonal staffing
- Marketing and communications
- Projects
- Program materials and supplies
- Events
- Gift Shop inventory

THE FORT MUSEUM EXPENSES SUMMARY 2022 PROPOSED



The Museum's cost structure is what it pays for all the other pieces of the Business Model. Most non-profits have a cost-driven structure, which means they work hard to ensure the cost of operating the museum and offering programs and services to their community is as low as possible.

A museum's expenses are often disproportionality weighted in the Fixed Costs categories, which is to say that most of the expenses that a museum incurs will not have a direct revenue impact and are the same whether the museum attracts 10 people a weekend or 1,000. This includes core staff, utilities, administration and professional services, facility maintenance, and collection and livestock management costs.

Variable costs change based on the number and size of activities a museum engages in and have a more direct impact on revenue. For example, a museum will spend more on gift shop inventory if the volume of goods sold is high but will also have generated more revenue.

For a museum to generate the revenue it needs to cover its expenses and advance its mission, it takes spending on variable costs to impact the overall financial condition of the museum. The adage that "one needs to spend money to make money" holds true when it is about:

- Strategic investment in marketing and communications to drive visitorship and engagement;
- Offering programs and services with associated fees that are sufficient to cover the costs of providing them and to generate revenue above that;
- Hosting events for which tickets are sold and add-on revenues generated (food and beverage, product sales, fundraising activities, and donations);
- Inventory for the gift shop, concession, or hospitality.

These expenses all carry the potential to improve a museum's overall financial health and can be turned into increased capacity to offer more of what the community needs and wants.



Strategic Impact



FOCUS AREAS

GOVERNANCE

OPERATIONS

FINANCIAL

STRATEGY

FIRST STEPS

To begin implementing this Plan and the Business Model, The Fort Museum can take these recommended first steps:



FOCUS AREAS	FIRST STEPS
Governance	<ul style="list-style-type: none"> ○ Shift the Board of Directors to focus on strategy and monitoring the organization's success in achieving that by using the tools provided. ○ To implement the Fort Museum Governance Policy Manual, review the recommendations and policies with the whole Board, adopt the Manual in principle, and review the policies in detail — making changes as required — using the monitoring schedule and guided by the Governance Committee.
Operations	<ul style="list-style-type: none"> ○ Address capacity in building back staffing levels and in deciding which staff positions to fill first. Focus on freeing up time for core staff. ○ Value staff time in determining the cost of programs and services. ○ Ensure the Marketing Coordinator position includes grant-writing experience. Grant writing can be a shared responsibility of the Executive Director and Marketing Coordinator with other staff support when content expertise is required (i.e., collections management projects). ○ Implement the Strategic Framework using the Decision Matrix tool and the Business Plan, beginning with the First Steps identified here.
Financial	<ul style="list-style-type: none"> ○ Pursue grants and partnerships to add staff to grow the capacity of core staff and the reach of the Museum. ○ Use increased staff capacity to build earned revenues. ○ Evaluate revenue generation for existing public-facing programs and consider the potential for revenue generation in the development of new programs to meet customer segment needs. Prioritize those programs with higher revenue potential while building capacity.
Strategy	<ul style="list-style-type: none"> ○ Build networks and key partnerships, especially in re-imagining the role and relationship of the Cultural Heritage Tourism Alliance, deepening relationships with the Indigenous Nations in the region, looking for mutually beneficial opportunities with Head-Smashed-In Buffalo Jump and other nearby cultural organizations and experiences. ○ Target communication and marketing messages to customer segments. ○ Adjust and adapt program, event, and service offerings to meet customer segment needs. ○ Actively pursue and grow relationships with Indigenous Nations and Elders to support exhibit and program development. ○ Develop exhibits, programming, and other educational resources to more holistically tell the history of the Fort and the settlement of Fort Macleod. ○ Facilitate the development of exhibits and programs told from an Indigenous voice and shared under Indigenous leadership. ○ Explore contemporary issues by partnering with educational institutions and community organizations.



Make Space

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The Fort Museum of the NWMP and First Nations Interpretive Centre Sustainability Project was completed by the Museum's Board and staff under the guidance of the Sustainability Project Committee and Governance Committee together with Hatlie Group.

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**Investment
Readiness**
Program



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Make Space, The Fort Museum 2021–2023 Business Plan, and the companion *The Fort Museum Sustainability Project Final Report* have been prepared by Alexandra Hatcher, Crystal Willie, and Associates from the Hatlie Group.

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