



Santa Barbara Maritime Museum



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EXECUTIVE SUMMARY: SANTA BARBARA MARITIME MUSEUM

Santa Barbara Maritime Museum (SBMM) engaged in a focused strategic planning process to better pursue stability, growth, and excellence. Reaching new audiences is seen as a key goal, especially during this time of uncertainty for museums everywhere due to COVID-19. At the same time, this Strategic Plan will be used to support accreditation and “Best Practices” with the American Alliance of Museums.

Antenore & Associates (A&A) worked with the SBMM Strategic Plan Steering Committee (SPSC), made up of Board and staff leadership, to explore what tools stakeholders thought would support the Museum. Areas identified included enhancement of programs and offerings and the resources needed to pursue these priorities. The strategic planning process consisted of research, materials design, meetings, interviews, focus groups with key stakeholders (including but not limited to the SBMM Board of Directors, major donors, volunteers, and staff), and coordination and facilitation of an online survey.

This work was guided by the Strategic Plan Steering Committee:

- ◆ Don Barthelmess, President, Board of Directors
 - ◆ Sigrid Toye, Vice-President, Board of Directors & SPSC Chair
 - ◆ Gail Anikouchine, Treasurer, Board of Directors & Finance Committee Chair
 - ◆ Linda Stirling, Board of Directors and Education Committee Chair
 - ◆ Greg Gorga, Executive Director
 - ◆ Emily Falke, Director of Collections & Exhibits / Curator
1. Additional SBMM staff members: Jane Lindsey, Director of Development; Lis Perry, Director of Education; and Rita Serotkin, Marketing and PR Coordinator- contributed to the development of this plan
 2. Consultant team: Angela Antenore and Hanna Ashcraft, Antenore & Associates

The **SBMM Mission and Vision Statements** were used to guide this work:

- ◆ **MISSION:** Creating quality exhibits and educational experiences that celebrate the Santa Barbara Channel and illuminate our rich connections with the sea.
- ◆ **VISION:** To be the recognized flagship institution for information on the Santa Barbara Channel by showcasing our rich maritime history, presenting inspirational programs, and prompting insightful discussions about the future of our coastal community.

The input provided by key stakeholders participating in focus groups and the community survey with approximately 150 responses can be summarized into the following six key goals and areas for focus:

1. MUSEUM VISIBILITY
2. FISCAL SUSTAINABILITY
3. EDUCATIONAL
4. EXHIBITS AND COLLECTIONS
5. PUBLIC TRUST & ACCOUNTABILITY
6. LEADERSHIP & ORGANIZATIONAL STRUCTURE

GOALS, OBJECTIVES, & STRATEGIES

GOAL 1: VISITOR EXPERIENCE AND SBMM VISIBILITY

Increase membership by expanding the visibility of SBMM through advertising, media exposure, collaboration with other institutions, and expanded presence on social media.

Objective A: Develop a comprehensive marketing plan.

Strategies/Activities:

1. Resume Board Marketing Committee meetings to assist Marketing & PR staff to work with a consultant in developing and executing the Marketing Plan **(Year 1)**
2. Secure funding and hire a consultant to develop a comprehensive Marketing Plan **(Year 1)**
3. Further develop staff skills and identify **(Year 1)** and secure (Year 2) funding to hire additional professional resources to support efforts (Year 2)
 - a. Prioritize advertising in the budget for media coverage as well as relationship building and outreach with diverse business entities (Year 2-5)
 - b. Include utilizing community partnerships in the Marketing Plan **(Ongoing)**

Objective B: Expand and diversify the Museum's audience/membership

Strategies/Activities:

1. Identify communities for outreach **(Year 1)**
2. Identify tools and programs needed to reach target audiences **(Year 1-2)**
3. Outreach to broader, more diverse audiences including **(Ongoing)**
 - a. Through Spanish language media outlets
 - b. Young adults and families
 - c. Staff and students at universities and colleges
 - d. Seniors
4. Investigate multi-lingual tools
5. Convert new visitors to members

Objective C: Promote exhibits (in collaboration with Curatorial Department)

Strategies/Activities:

1. Publicity (print, media, social media, promo videos) **(Ongoing)**
 - a. Exhibit-specific PR (a "hook" for focus & engagement)
 - b. Include experts, artists, and lecturers in media coverage, radio, or TV
 - c. Add to and develop media contacts to increase coverage
2. Increase marketing budget (Year 2-5)
3. Increase paid advertisements (Year 2-5)
 - a. Target proper publication, media outlets

- b. Expand advertising throughout California / nationally.
- 4. Enhance physical visibility of the Museum itself **(Ongoing)**
 - a. Includes signage, banners, outdoor exhibits
 - b. Exterior enhancement working in partnership with:
 - i. Neighboring businesses
 - ii. City of Santa Barbara
 - iii. Waterfront Department
 - iv. Architectural & Historical Review

Objective D: Market and promote education-related activities and efforts (In collaboration with Education Department).

Strategies/Activities:

- 1. Promote Lectures and other adult programming **(Ongoing)**
 - a. Expand on popularity by leveraging:
 - i. Print and electronic media coverage
 - ii. Invitations to associated communities including state and nation-wide audiences (e.g., seniors and newcomers)
 - iii. Active promotion of events and lectures by Board Members
- 2. Promote school-based educational programs (Year 2-5), K thru 8 +, and After-school programs
 - a. Engage local schools (public and private), churches, and temples
 - b. Engage and involve area educators
 - c. Pursue cultural sensibilities, inclusion and strategies to engage community-wide populations
 - i. Send press releases, promotional materials, program information, and other educational offerings to a wider range of entities: local schools (public and private), faith communities, educators, and after-school groups
 - ii. Provide Spanish language materials, dual language docents, Chumash representation, and resources for other cultural entities

GOAL 2: FISCAL SUSTAINABILITY

Solidify funding and the financial future to ensure the sustainability of the Museum.

Objective A: Adapt and innovate to meet fundraising goals given the changing environment in which we do our work as a museum.

Strategies/Activities:

1. Build Grant Portfolio (Ongoing)
 - a. Pursue professional grant writing expertise **(Years 1-2)**
 - b. Maintain good standing with existing grant funders (especially with COVID) **(Ongoing)**
 - c. Secure additional local, regional, and state-wide grants (Year 2-5)
 - d. Pursue Federal grants based on AAM accreditation (Year 3-5)
 - e. Continue to secure exhibit and educational program funding and sponsorships **(Ongoing)**
2. Enhance and Re-Brand Navigators Circle Program
 - a. Finalize the new Navigators Circle Business Plan **(Year 1)**
 - b. Create plans, evaluate costs, and acquire funding and permits for Navigators facility upgrades **(Years 1-3)**
 - c. Create new Navigators events and programs linked collaboratively with exhibits and educational programs **(Year 1 - Ongoing)**
 - d. Create opportunities for Corporate partners to participate in Navigators Membership benefits (Sponsorships, presentations, excursions) (Year 2-5)
3. Develop Planned Giving & Endowment Campaign
 - a. Maintain Flagship Society Plan and pursue one-on-one asks to add members **(Ongoing)**
 - b. Host one social/educational planned giving event annually
 - c. Evaluate readiness, budget, and staff resources to implement planned giving software (Year 2)
 - d. Determine timing and staff/consultant needs to initiate Endowment feasibility study and Campaign (Year 3)
 - e. Begin Endowment Campaign and secure initial gifts (Year 3-5)
 - f. Create and adopt Investment Policy **(Year 1)**

Objective B: Pursue targeted fundraising efforts to promote the Museum and its offerings.

Strategies/Activities:

1. Create quality events tied to mission **(Ongoing)**
 - a. Off-site (Private homes, yachts, harbor)
 - b. Exhibit- and Education-related
2. Re-imagine high-profile events (e.g., Annual Fundraiser and other fund-raising events) **(Ongoing)**
3. Board Involvement **(Ongoing)**
 - a. Hold one-on-one or small group meetings w/Board members and Navigators Committee to approach potential donors
4. Increase general membership
 - a. Review Membership benefits and opportunities **(Years 1-2)**
 - b. Explore digital membership (Year 3-5)
5. Increase sponsorships / partnerships **(Ongoing)**
 - a. Review sponsorship opportunities for Museum events, programs, activities, and exhibits

"Museums support 726,000 direct and indirect jobs and contribute \$50 billion each year to the economy. Of the museums able to reopen, over 40% plan to do so with reduced staff and will need to spend additional funds to ensure their ability to reopen safely," AAM said in a statement.
- NPR

GOAL 3: EDUCATION

Operate educational programs to the highest standards and best practices for U.S. museums.

Objective A: To become the recognized regional center for maritime education by enhancing and further developing existing and new community educational programs.

Strategies/Activities:

1. Continue to expand educational programs beyond the walls of the museum (e.g., Maritime on the Move) and strive to encompass all aspects of maritime education (history, diversity of careers, environment, nature)
 - a. Maintain and expand digital offerings (MotM, Virtual Lessons, Monthly Lecture Series, and SBMM at Home) **(Year 1 - Ongoing)**
 - b. Further develop community partnerships (Year 2 – 5)
 - c. Identify resources and hire additional education staff **(Years 1-2)**
 - d. Create age-appropriate materials, activities, and specialized training based on exhibits (Year 2- 5)

Objective B: Increase the role and reach of the docent program.

Strategies/Activities:

1. Docent Recruitment: Reach out to local community for recruitment of docents with diverse skills and backgrounds
 - a. Outreach to regional high schools, colleges, senior living facilities, senior groups, local clubs, parent groups/organizations (Year 2 – 5)
 - b. Use social media and advertising to generate interest in SBMM as an outlet for community service. **(Year 1 + Ongoing)**
2. Docent Training Program
 - a. Offer virtual live training sessions based on docent manual, with individual virtual sessions for those unable to attend a scheduled training. **(Year 1)**
 - b. Encourage all Board Members, committee members, other volunteers, and staff to take a tour of SBMM with the Executive Director or docent **(Ongoing)**
 - c. Identify and train a Board member as liaison to the Docent Program **(Year 1)**
3. Expand Docent Involvement
 - a. Expand docent involvement with more SBMM visitors and programs, (e.g., Docent on Deck, School Tours, Adult Group Tours, Science Nights, Community Events.) **(Ongoing)**
 - b. Plan and implement categories of Docents to allow for specialization in specific areas of interest (Year 3 – 5)
 - c. Review training manual and practices regarding Docent/Volunteer acknowledgement and recognition **(Year 1 + ongoing)**

Objective C: Be adaptable and responsive to the changing environment as a museum through its educational programming and exhibits.

Strategies/Activities:

1. Build a diverse digital-based education plan that coincides with exhibits
 - a. Maintain interactive digital learning (i.e., webinars, SBMM at Home, virtual tours, Deeper Dive, and Curator's Log) **(Year 1)**
 - b. Collaborate with Curator to support building more educational components for existing, traveling and new exhibits **(Ongoing)**
 - c. Prioritize and implement new technology as needed **(Ongoing)**
 - d. Create curated tours with multimedia content and accessibility for mobile device engagement (Year 2 – 5)
2. Expand multilingual materials to adapt to changing demographics **(Ongoing)**

GOAL 4: EXHIBITS

Develop and present exhibits to the highest standards and best practices for U.S. museums.

Objective A: Create new ways for visitors to access and interact with exhibits.

Strategies/Activities:

1. Create/develop outdoor exhibits
 - a. Research and leverage *Ranger* and *Sea Mew* (**Research Year 1, Exhibit development ongoing**)
 - b. Curate pop-up displays (1-2 days or over a weekend / est. bi-monthly 5-6 a year) on the patio (**Research Year 1, Exhibit development ongoing**)
 - c. Collaborate with other maritime-related organizations for traveling exhibits and vessel visits (**Research Year 1, Exhibit development ongoing**)
 - d. Work with the Education Department to build more educational components into existing, traveling, and new exhibits (2-5years)
2. Mobile Engagement
 - a. Recruit and hire assistant Curator with a background in technology (Year 3- 5)
 - b. Work with the Education Dept. to develop digital and other educational components tied to the exhibits (3-5 years)

Objective B: Achieve AAM Accreditation.

Strategies/Activities:

1. Prepare Museum and Kieding Collections Chandlery to meet “Best Practices” Standards
 - a. Accession and deaccession items for/in collection (**Year 1**)
 - b. Catalog, identify, and categorize collection in PastPerfect (**Year 1**)
 - c. Digitize specific exhibits/collections (Year 2 – 5)

Objective C: Further Develop Community Collaborations.

Strategies/Activities:

1. Showcase shared and traveling exhibits
 - a. Create, research and develop traveling and shared exhibits (Year 2 – 5)
2. Work with regional partners to develop issue/theme-based exhibitions
3. Work with other Museum partners to develop and/or share traveling exhibits
 - a. Research and develop on-going traveling and shared exhibits from other institutions (**Year 1- Ongoing**)
 - i. Research, develop, install “Collective Impact on Climate and Our Natural Future” in conjunction with local partners (**Year 1 -2**)
4. Continue to develop and share SBMM’s Traveling Exhibits to other Museums (Year 2-5)
 - a. Continue to travel and share exhibits SBMM owns
 - i. Measure: Attendance and engagement at institutions (Year 2 - Ongoing)
 - b. Research and secure on-going traveling and shared exhibits from other institutions

GOAL 5: PUBLIC TRUST AND ACCOUNTABILITY

Be transparent, considerate, and responsive to the diverse interests and cultures that we serve.

Objective A: Be an active participant in our local community and make informed decisions while serving different populations.

Strategies/Activities:

1. Pursue further collaborations with other organizations
 - a. Participate in collaborative exhibits, advertising, and programs **(Annually)**
2. Leverage regional issues into programs, exhibits, and offerings
 - a. Showcase our rich maritime history, presenting inspirational programs and providing a forum that prompts insightful discussions about the future of our coastal community. (Year 2)
 - b. Host community nonprofits, associations, clubs, and groups, especially maritime-related organizations, and events **(Ongoing)**

Objective B: Continue to strive to practice inclusion and offer opportunities for participation and access at all levels from our diverse populations.

Strategies/Activities:

1. Develop an access, inclusion, diversity and equity Action Plan for volunteers, staff and board **(Year 1)**
2. Analyze the communities the Museum serves to develop programming to engage them appropriately **(Ongoing)**
3. Actively seek to partner with and/or host diverse after-school groups and organizations for educational programs, exhibits, and events (Year 2-5)
4. Facilitate a welcoming environment where diverse and provocative issues can be discussed in constructive ways **(Ongoing)**
5. Develop partnerships with Spanish-language media and organizations (Year 2-3)
6. Recruit and engage members, donors, partners, docents, and volunteers from diverse backgrounds and experiences (Year 3)
7. Practice strategic outreach so that all members of the community can participate in relevant Museum programs **(Ongoing)**

Objective C: Prioritize the Museum's public service role as an educational center.

Strategies/Activities:

1. Continue and further develop ways the Museum can serve as a community resource for maritime-related news and issues **(Ongoing)**
2. Participate in or host ocean environment-related events **(Ongoing)**
3. Serve as a model for the community by maintaining and improving Green Business standards **(Ongoing)**

GOAL 6: LEADERSHIP & ORGANIZATIONAL STRUCTURE

Operate SBMM consistent with AAM and 501(C)3 nonprofit Best Practices with an effective, dynamic, and diverse Board of Directors, Staff, and Volunteers.

Objective A: Ensure the Board, staff and volunteers have a clear and shared understanding of their respective roles and responsibilities.

Strategies/Activities:

1. Identify Board development opportunities to enhance the strength of SBMM **(Annually)**
 - a. Convene the Board Development committee in January of each year
 - b. Confirm Board members are clear about how to execute their roles effectively

Objective B: Utilize best practices in leadership and organizational structures and processes.

Strategies/Activities:

1. Board **(Annually – Starting Year 1)**
 - a. Develop BOD self-evaluation criteria including service, attendance, and participation **(Year 1)**
 - b. Review Board-staff protocols and procedures annually at Board meeting
 - c. Perform self-evaluation and assessments to identify training and skills development goals needed for Board Member success **(Year 1)**
 - d. Provide on-going Board training
 - e. Review/revise and update Board Responsibilities document
 - f. Board Development Committee will identify capable potential BOD members **(Ongoing)**
 - g. Assess Board members' skill set and evaluate for missing skills.
 - h. Determine recruitment plan based on missing skills
 - i. Evaluate current board member performance including attendance, committee participation, fund raising efforts and service
2. Staff **(Annually – Starting Year 1)**
 - a. Analyze and review staff roles, responsibilities, skills and needs
 - b. Revise staffing, roles, and job descriptions based on the analysis and implement changes accordingly
 - c. Review and revise personnel handbook and other compliance forms
 - d. Develop a comprehensive Succession Plan for key staff (Directors) (Year 2-4)
3. Volunteers **(Annually – Starting Year 1)**
 - a. Volunteer Coordinator reviews and updates Training Manual
 - b. Volunteer Coordinator reviews training manual with volunteers **(Annually)**
 - c. Volunteer Coordinator develops recruitment plan for docents and volunteers with the Education Department

Objective C: Utilize diverse skills, backgrounds, and experiences to better pursue the Museum's mission, to survive and thrive into the future.

Desired Outcomes:

1. Generate a museum culture of belonging and inclusion for all stakeholders, including staff, Board Members, volunteers, participants, and museum goers
2. Create stronger teams at the Board, staff, and volunteer levels that promote mutual respect and successful collaboration between all parties we serve and encounter

3. Prioritize and cultivate an organizational culture that values diversity, equity, and inclusion at all levels throughout the organization

SECTION III: OVEVIEW OF FOCUS GROUPS AND INTERVIEW INPUT

FOCUS GROUP ATTENDEES

1. Board Members: 16
2. Community Members: 8
3. Staff: 9
4. Total Focus Group Participants: 33
5. Interviews: 7

RESPONSE THEMES

The following ideas, suggestions, topics, and responses were raised multiple times in these processes.



I. SBMM Visibility:

- a. Acknowledgement that more people need to know about the Museum (Too many do not know it exists).
- b. Many ideas to increase signage around the harbor front, on the patio or building, on *Ranger* (consider finding ways to have it included on the freeway).
- c. Most people saw social media as an opportunity for the Museum with the caveat that a strategy needs to be in place to ensure effort is put toward the most effective options.
 - i. And if using traditional media, consider strategically where is it best to put advertising dollars.
- d. Participants expressed a need to get people walking by the Museum to come in.
 - i. Better utilize the patio, *Ranger*, and interactive items outside the museum to draw people in.
- e. Place docents on *Ranger* and on the patio with an interesting item to entice people to want to know more / eventually go inside.
- f. Target different audiences: travelers, families, elementary school-aged children, retired community, students at SBCC, UCSB, Westmont, etc.
- g. There have been improvements in the awareness of SBMM, and there is more work that needs to be done.
- h. Consider bring in techies to support regular social media
- i. Better use of the outdoor space around the museum to draw people in.
 - i. Using the wall for banners like other museums in the areas
 - ii. Include highlighting the museum at the patio area to create a clearer entrance and invitation to come to the museum (not only about the restaurants)
- j. Create a “passport” for Ocean Days (June), Earth Day and other museums; may include sharing volunteers
- k. Develop partnerships with area restaurants and hotels – especially those in the harbor

II. Visitor Experience:

- a. There was an overwhelming desire for the Museum to offer experiences outside the Museum building. This includes both online and outdoor activities.
 - i. Could adapt some of the current programming to be outside (ex. Museum on the Move, Geocache – a curated Scavenger Hunt in the Harbor and waterfront, etc.)
- b. Participants would like to see *Ranger* utilized.
- c. Potential to partner with other organizations. (*see below education and docents*)
- d. Provide a daily or at least regularly scheduled docent tour. (*see below docents*)

III. Fiscal Sustainability:

- a. Expanding planned giving efforts including pursuing an endowment campaign
- b. Grant writing should be a focus and is important to support with the goal to expand grant writing and expand the team bandwidth
- c. The Navigator's Circle is seen as a success. Should be expanded and done in coordination with other "asks."
- d. Day or multi-day trips came up with much excitement in the focus groups as an education opportunity and income generator.
- e. Events were acknowledged as a revenue generator to be planned for post-COVID
- f. Make sure the stock transfer process is developed and smooth for donors
- g. Expand and continue to support the Navigators Circle and Flagship Society
- h. Charitable Remainder Trusts could be marketed and highlighted more
- i. The "club" concept for the patio was supported in interviews
- j. Develop a focus on the audience by analyzing the "why" for an activity – determine if a Fund-raiser or Friend-raiser

IV. Education:

- a. Goals for education could include "to preserve nature and our cultural history."
- b. There were many ideas for new education opportunities, but with the understanding that there needs to be coordinated and experienced staff support to execute the ideas.
- c. Generate a more intentional approach with a future focus to be more inclusive and have more outreach to diverse visitors, including:
 - i. Age (ages 5 – 15 was mentioned several times)
 - ii. College students (interns)
 - iii. Girls (STEAM/STEM)
 - iv. Chumash
 - v. Spanish-speaking docents and visitors
 - vi. Families
- d. Partnerships with youth-serving organizations, schools, and colleges are important opportunities.
 - i. This item was mentioned numerous times to consider the diversity and inclusion goals for the museum
 - ii. Girls, Inc., students from throughout the region, more diverse communities (Chumash, Spanish speaking, etc.)
 - iii. Family programming
- e. Relationships with teachers deserve to be more developed
- f. Topics for consideration included Maritime history, including the lumber business
- g. Pursue interactivity
 - i. More museum sponsored outdoor activities
 - 1. Link to the history of boats and vessels and propelling against the forces of nature:

- a. Paddling
 - b. Wind
 - c. Power
 - d. Evolutionary sequence of boat hulls and ship design: Raft, Canoe, Oars, Sails, Motor
 - e. Maritime Communication
 - f. Lighthouses
 - g. Radio / Radio Satellite
 - h. Navigation: How did people figure out how to navigate? Latitude is easy, longitude is a huge challenge
 - i. Smuggling/Piracy/Crime – history and today
 - j. Evolution of prop system method
2. Get youth out on the water, knot tying, team building, *Ranger*

V. Exhibits:

- a. Appreciation for the exhibits was highlighted.
- b. Strong desire for the exhibits to have more interactive elements.
- c. Some exhibits may be a puzzle for the visitor to find or do not rotate often enough.
- d. Consider videos to play at exhibits so visitors can learn and hear about highlighted elements
- e. The current exhibits are difficult to read – too many words in small print. The exhibits could be more enticing or accessible and would like to see that in the future.
- f. Consider topics such as the harbor being an essential part of the local economy.
- g. Pursue using the outdoor patio.

VI. Staff and Board:

- a. Staff:
 - i. Concern that there will be a difference between what they want to do vs. what they can get done.
 - ii. Some are looking for clarification of who does what because so many people are wearing multiple hats.
 - iii. Succession planning was identified as an important and timely consideration in this strategic plan
 - 1. Executive Director and Exhibits roles highlighted as needing targeted succession planning to provide support and be well-timed for inevitable transitions. Want to assure the support of next and new leadership can be cultivated.
- b. Board:
 - i. Acknowledges that its size can make decisions difficult, but do not want to lose institutional knowledge of those who have been involved for a long time.
 - 1. Suggestions to build an advisory committee and define clearly how to respect and utilize their expertise and experience.

VII. Docents:

- a. An overall theme from the focus groups was that the docent training program has improved a lot and is much appreciated.
- b. Idea that (all) board members and staff should take the docent training program was suggested.
- c. Limitations to docent recruitment and participation included hesitation regarding people who have full-time commitments or work full-time. The current schedule and the training process generate limitations.

- d. There is opportunity for the docent program to increase diversity through partnerships and recruitment. This will require an examination and update of how the docent training and responsibilities are structured and communicated.
 - i. Some flexibility and new ideas are needed to update the docent program to increase diversity of approaches and the docent pool.
 - 1. This could include:
 - a. Those who are versatile in virtual skills and tools
 - b. Target populations the SBMM would like to pursue being more engaged – (Chumash, youth, girls, Spanish-speaking.)
- e. Develop, collaborate, and engage additional partnerships with subject matter experts and organizations such as:
 - i. Naturalist Crops, Channel Islands Park, National Marine Sanctuary, “From Sea to Shore” Lecture like the SBMM, Audubon Society, UCSB, SBCC, Westmont
 - ii. Others
- f. Have levels of Docents, so one can specialize in smaller chunks of information
- g. Create a new format to the schedule for docents so they can plan on their service and training to support their participation

VIII. Diversity & Inclusion:

- a. Acknowledgement that the Board needs to think strategically about diversifying across many characteristics and experience – succession planning as well as pursuing diversity to expand the awareness of and engagement with SBMM throughout the region.
- b. Several ideas were shared about how to showcase the diverse history of the people in the Santa Barbara area.
- c. Would like to have more of the educational and exhibit information in Spanish.
- d. Recruitment of docents should include pursuing a more diverse docent pool.
 - i. This will likely require some new / different ideas for how they serve and scheduling.

IX. Year One

- a. Consider: Given COVID, what would we be willing to let go of, if needed?
- b. Relationship with the City – especially on outdoor space usage, seek out and develop relationship with new Planning Director.
- c. Leverage the changes occurring throughout the City with outdoor dining, signage, and patio/entrance usage.

X. Other notes for consideration:

- a. Leverage the relationship with the City during these COVID-related changes.
- b. Continue to strengthen relationships with:
 - i. The Yacht Club
 - ii. Chamber
 - iii. Other museums (Natural History, SB Botanic Garden regarding the channel and Channel Islands, in particular)
 - iv. The City of Santa Barbara

CONSIDERATIONS FROM THE SURVEY

With an impressive 153 respondents, it is possible to better understand how stakeholders view the Santa Barbara Maritime Museum. The survey sought the respondents' input and expectations about how to enhance services and their specific suggestions for the current business environment.

When asked about the Museum as a whole, the response was very positive:

- 95% of respondents agreed or strongly agreed to seeing and experiencing the Museum's pursuit of its Mission.
- 89% agreed or strongly agreed to seeing and experiencing the Museum's pursuit of its Vision.
- 97% had an excellent or good perception of the Museum

The survey responses tended to mirror what was said in the focus groups including these themes:

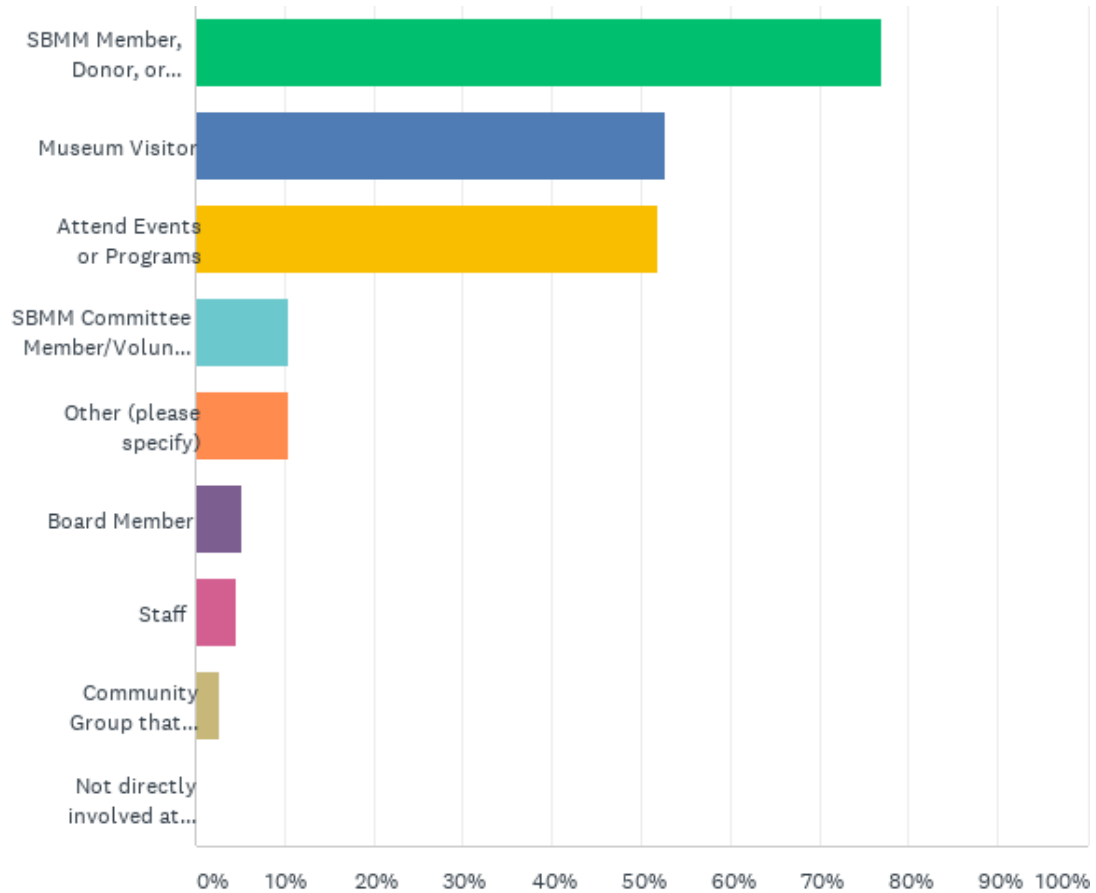
- **Museum Visibility:** Most respondents received or accessed information about SBMM via the weekly emails, website, or Currents newsletter. Fewer people received or accessed information from local newspapers or social media.
- **Docents:** About 50% of respondents engaged with a SBMM docent. When they did engage with a docent, respondents found the docent very helpful.
- **Fiscal Sustainability:** 57% of respondents had participated in a fundraising event. They had new ideas such as smaller fundraising events or smaller giving drives to specific programs. Respondents also wrote in responses about going out on *Ranger* or having other boat activities as a potential fundraiser.
- **Educational Programs:** The overall response to the Educational Programming at the Museum was very positive. When asked about specific programs, most respondents had only participated in the Monthly Lecture Series or the Spirit of Dana Point Tall Ship Program. Respondents rated the programs that were attended as excellent. Other ideas that participants wrote about included:
 - Getting outside the Museum
 - Partnerships with other businesses and organizations in the community
 - Educational opportunities for adults
- **Exhibits:** We asked respondents to prioritize and give ideas for the Museum's exhibits. When prioritizing, they selected the following as the top three: (1) Provide more interactive opportunities utilizing outdoor spaces, (2) Have exhibits at/with partner institutions, (3) Focus exhibits on the diverse history of the SB region. Additional ideas included, but are not limited to:

- Bringing exhibits outside to the patio
- Focus on the impacts of climate change
- Utilize video for online engagement



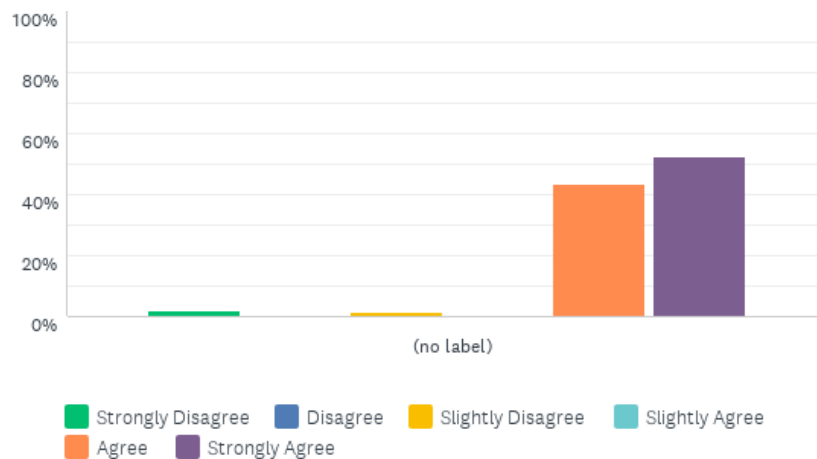
SECTION V: SBMM SURVEY DATA

QUESTION 1: SBMM is seeking input from people with diverse experiences and backgrounds with the Museum. What is your relationship with SBMM?



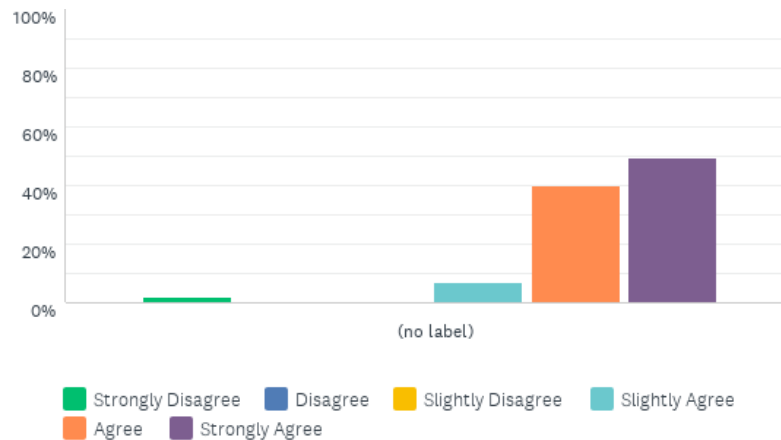
ANSWER CHOICES	RESPONSES	
SBMM Member, Donor, or Funder	76.97%	117
Museum Visitor	52.63%	80
Attend Events or Programs	51.97%	79
SBMM Committee Member/Volunteer	10.53%	16
Other (please specify)	10.53%	16
Board Member	5.26%	8
Staff	4.61%	7
Community Group that Collaborates with SBMM or Utilizes the SBMM Facility	2.63%	4
Not directly involved at this point	0.00%	0
Total Respondents: 152		

QUESTION 2: Consider the Mission of SBMM. Mission Statement: Creating quality exhibits and educational experiences that celebrate the Santa Barbara Channel and illuminate our rich connections with the sea. What is your level of agreement in seeing and experiencing the Museum’s pursuit of its Mission?



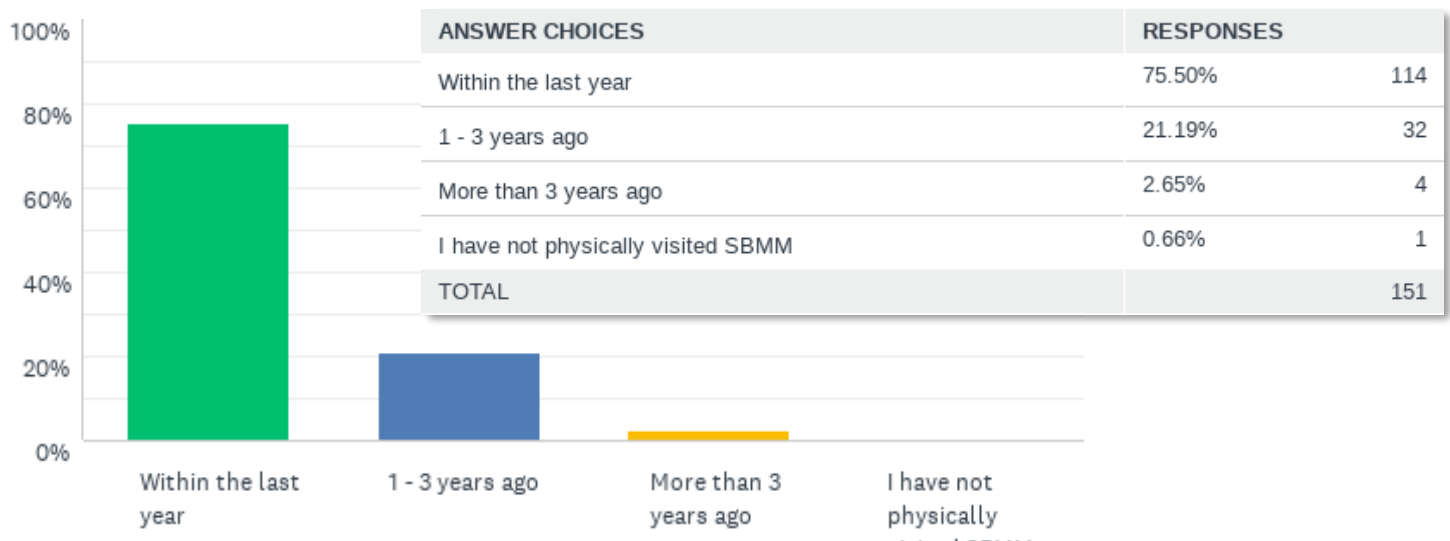
	STRONGLY DISAGREE	DISAGREE	SLIGHTLY DISAGREE	SLIGHTLY AGREE	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
(no label)	1.97% 3	0.00% 0	1.32% 2	0.66% 1	43.42% 66	52.63% 80	152	5.41

QUESTION 3: Consider the Vision of SBMM. Vision Statement: To be the recognized flagship institution for information on the Santa Barbara Channel by showcasing our rich maritime history, presenting inspirational programs, and prompting insightful discussions about the future of our coastal community. What is your level of agreement in seeing and experiencing the Museum’s pursuit of its Mission?

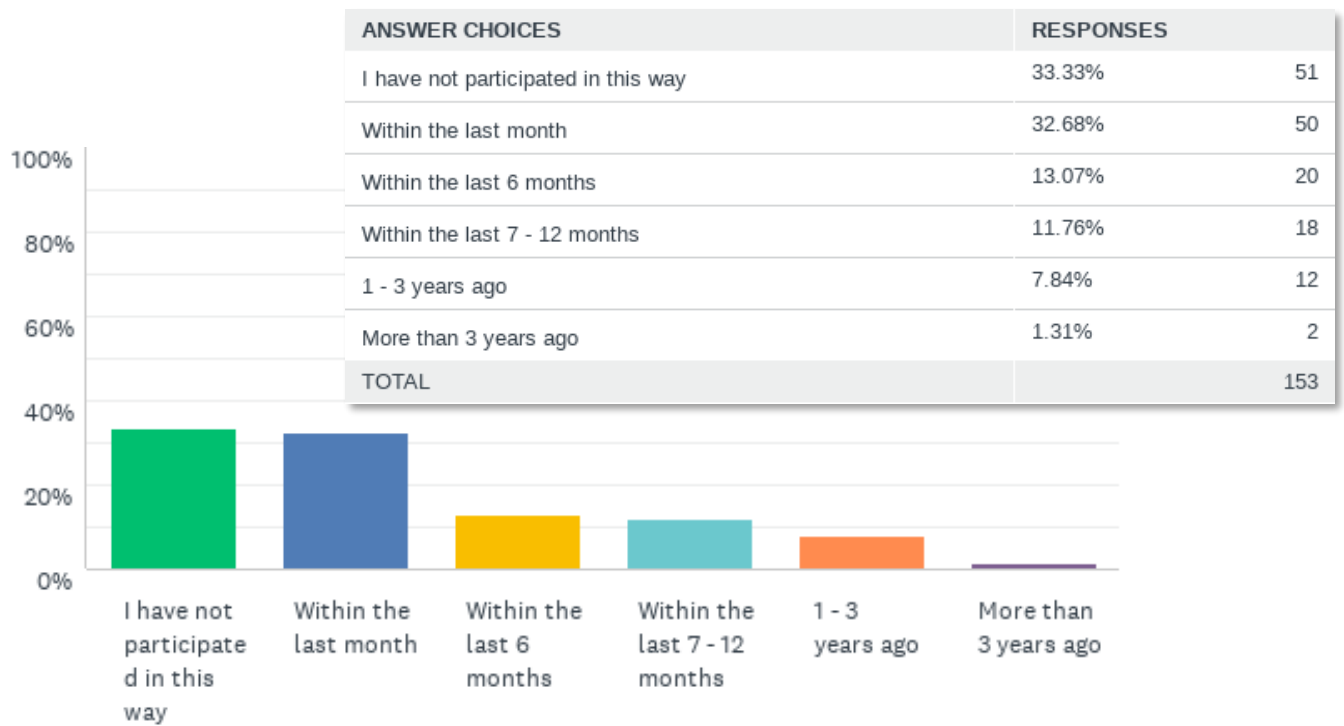


	STRONGLY DISAGREE	DISAGREE	SLIGHTLY DISAGREE	SLIGHTLY AGREE	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
(no label)	2.04% 3	0.68% 1	0.68% 1	6.80% 10	40.14% 59	49.66% 73	147	5.31

QUESTION 4: When was the last time you physically visited SBMM, attended a lecture or event, or participated in a program?

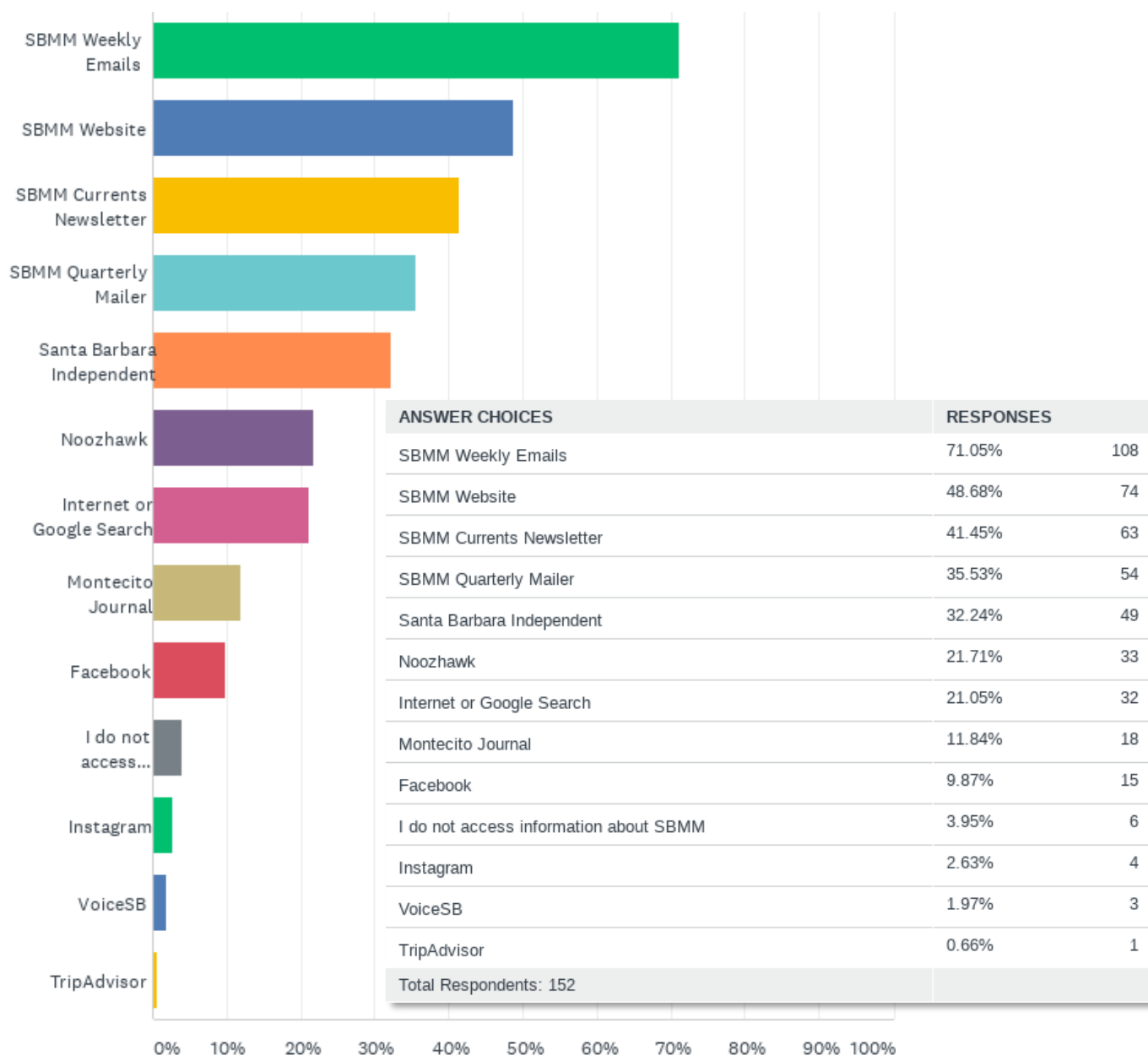


QUESTION 5: When was the last time you accessed any SBMM online/virtual resources, lecture, or event?



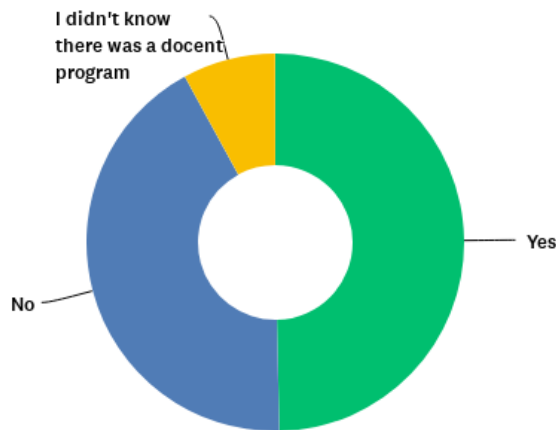
OTHER RESPONSES: There were 47 write-in responses about specific activities respondents accessed online, including lectures, She is the Ocean, education around sharks, and the art auction.

QUESTION 6: One of the goals of SBMM is to continually look for ways to enhance the visitor experience of the Museum while improving visibility and community awareness. How do you currently receive or access information about SBMM, its programs, and resources? Check all that apply.



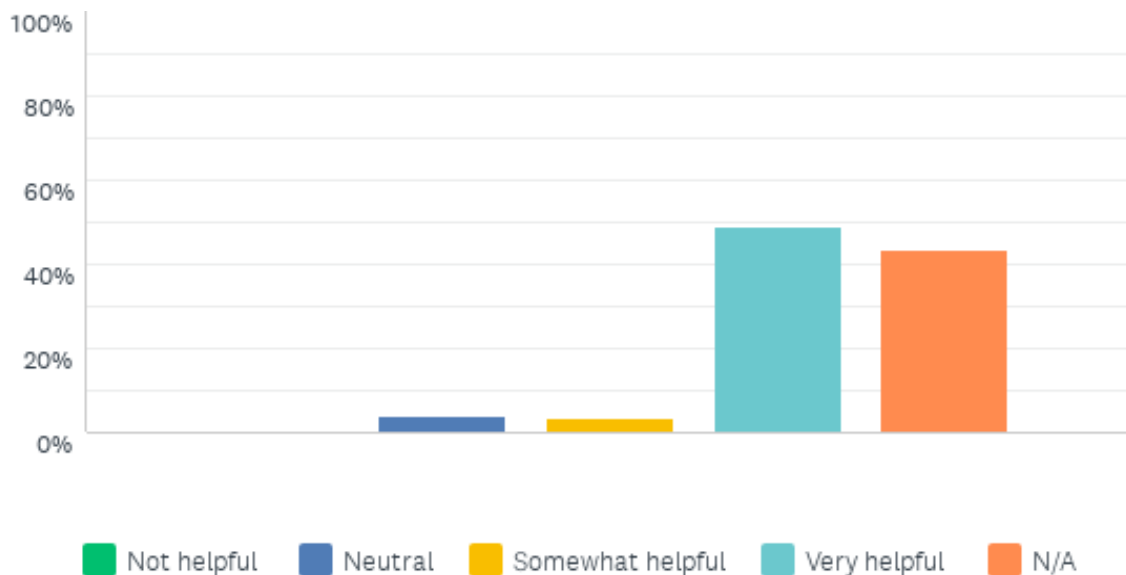
OTHER RESPONSES: There were 27 additional comments. Most focused on the emails – that they like them and are doing a good job and a couple of people think they could be more exciting. Two people though new relationships with nearby maritime museums, SB Sail, Power Squadron, and putting events on the SBSPS calendar could improve visibility.

QUESTION 7: Have you engaged with a docent while at SBMM?



ANSWER CHOICES	RESPONSES	
Yes	49.67%	75
No	42.38%	64
I didn't know there was a docent program	7.95%	12
TOTAL		151

QUESTION 8: How helpful was/were the docents?



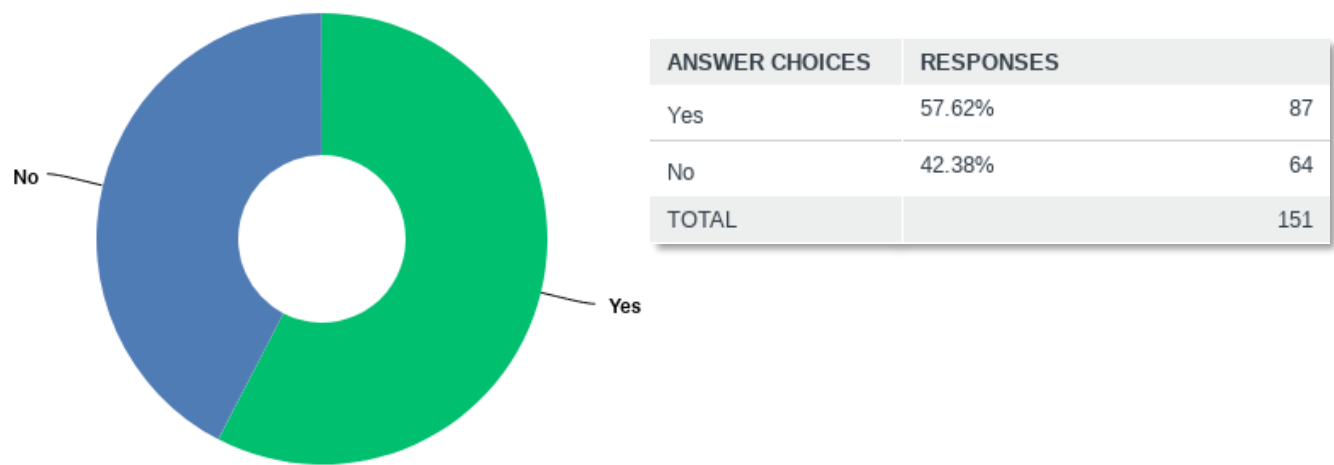
NOT HELPFUL	NEUTRAL	SOMEWHAT HELPFUL	VERY HELPFUL	N/A	TOTAL	WEIGHTED AVERAGE
0.00%	4.14%	3.45%	48.97%	43.45%		
0	6	5	71	63	145	5.32

OTHER RESPONSES: There were 21 comments about the docents. Most found that when the docents were engaged, they were very helpful. Others did not engage with a docent or did not know one was available.

QUESTION 9: What suggestions do you have for recruiting new docents or improving the docent program?

There were 70 responses which fit into the following themes. Outside, pursuing diversity-Chumash, Spanish language, younger docents, families – ties into docent schedule and training.

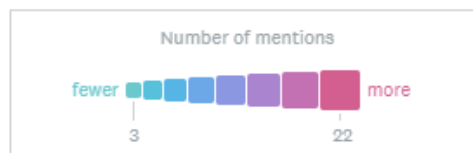
QUESTION 10: One of the goals of SBMM is to solidify funding and the financial future to ensure the sustainability of the museum. Have you participated in any of the museum’s fundraising events (e.g., SCAPE show, annual fundraiser, Wine & Seafood, Rum Raiser)?



OTHER RESPONSES: There were 82 additional comments to this question.

QUESTION 11: Given the changing environment in which we do our work as a museum (including COVID19,) what ideas do you have for SBMM to adapt to meet its fundraising goals?

outdoor events promote virtual events also lectures line
fundraising fun offer will museum None events
SBMM online raffles virtual Continue auction expand think
opportunities ideas



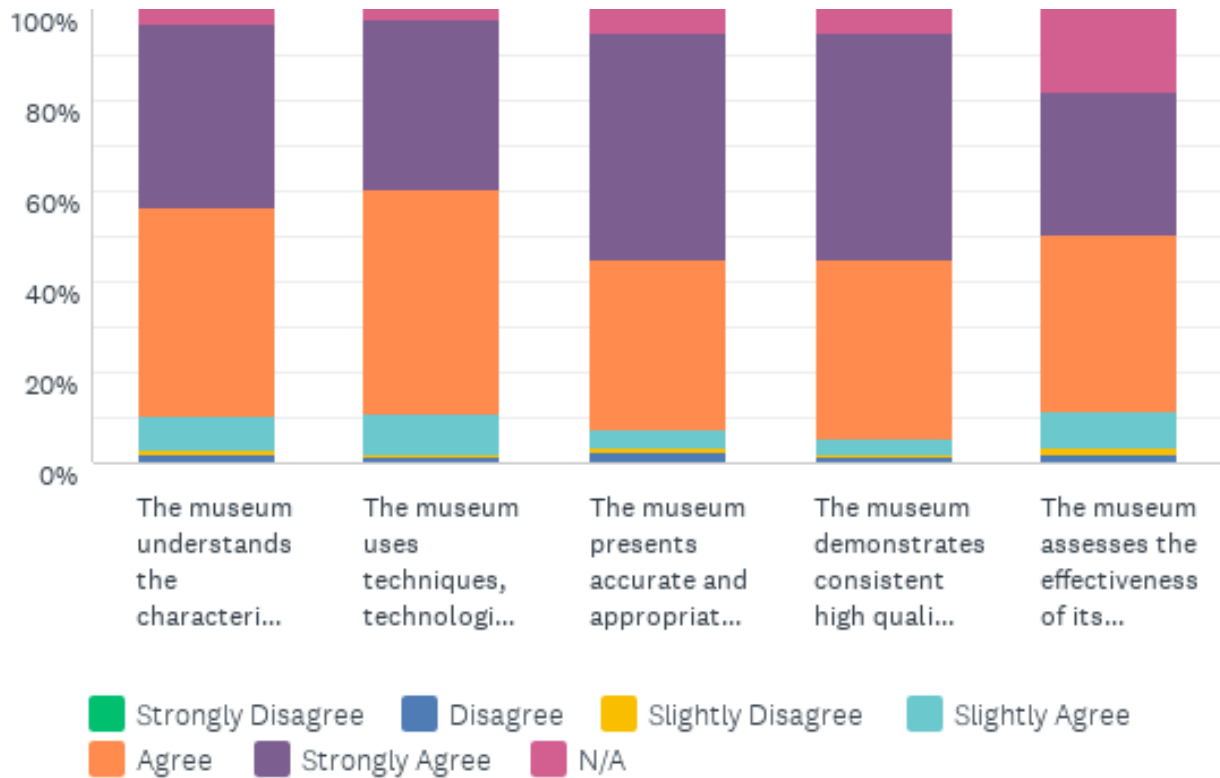
There were 85 written responses.

QUESTION 12: What ideas do you have that would help SBMM innovate our fundraising efforts?

There were 69 written responses which highlighted the following themes.

- Smaller fund (Friend-) raising events
- Gear smaller giving drives to specific programs
- Focus on the environment
- More boating activities / fundraisers

QUESTION 13: One of the goals for SBMM is to operate our exhibits and educational programs to the highest standards and best practices for U.S. museums. In pursuing its accreditation with the American Alliance of Museums (AAM), the Museum must meet standards that include an emphasis on “Education and Interpretation.” How well do you think the Museum meets the following AAM Standards?

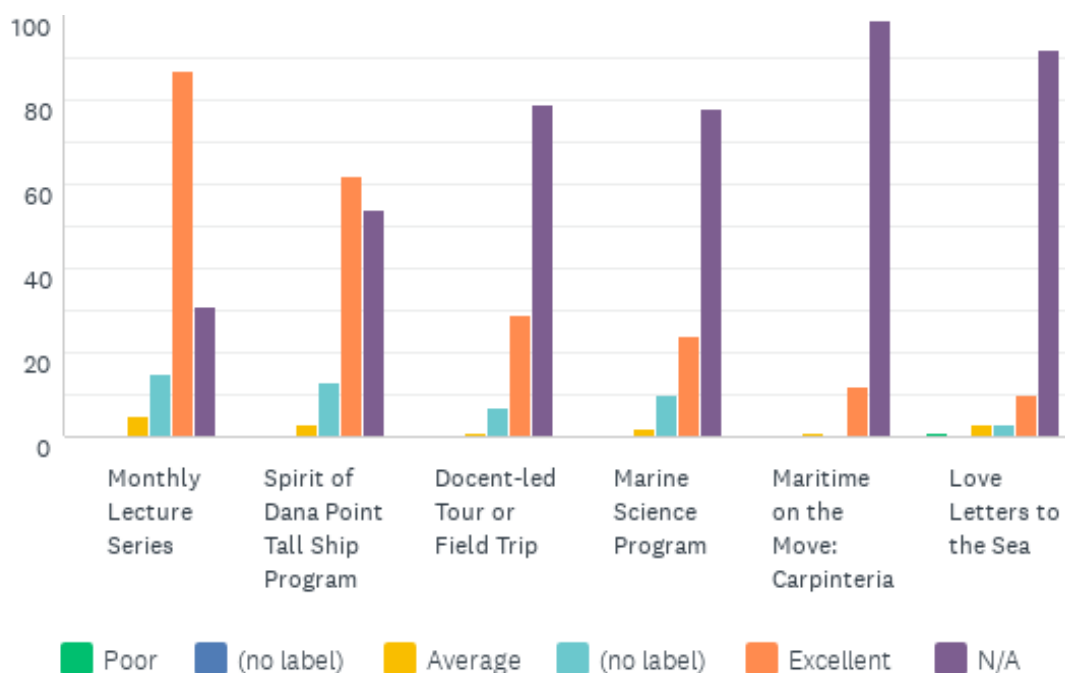


Data chart is shown on the next page.

(CONTINUED) QUESTION 13: One of the goals for SBMM is to operate our exhibits and educational programs to the highest standards and best practices for U.S. museums. In pursuing its accreditation with the American Alliance of Museums (AAM), the standards include an emphasis on “Education and Interpretation.” How well do you think the Museum meets the following AAM Standards?

	STRONGLY DISAGREE	DISAGREE	SLIGHTLY DISAGREE	SLIGHTLY AGREE	AGREE	STRONGLY AGREE	N/A	TOTAL	WEIGHTED AVERAGE
The museum understands the characteristics and needs of its existing and potential audiences and uses this understanding to inform its interpretation.	0.69% 1	1.38% 2	0.69% 1	7.59% 11	46.21% 67	40.69% 59	2.76% 4	145	5.26
The museum uses techniques, technologies, and methods appropriate to its educational goals, content, audiences, and resources.	0.69% 1	0.69% 1	0.69% 1	9.03% 13	49.31% 71	37.50% 54	2.08% 3	144	5.23
The museum presents accurate and appropriate content for each of its audiences.	0.68% 1	2.05% 3	0.68% 1	4.11% 6	37.67% 55	50.00% 73	4.79% 7	146	5.37
The museum demonstrates consistent high quality in its interpretive activities.	0.70% 1	0.70% 1	0.70% 1	3.52% 5	39.44% 56	50.00% 71	4.93% 7	142	5.42
The museum assesses the effectiveness of its interpretive activities and uses those results to plan and improve its activities.	0.73% 1	1.46% 2	1.46% 2	8.03% 11	38.69% 53	31.39% 43	18.25% 25	137	5.16

QUESTION 14: One of our goals includes becoming the recognized regional center for maritime education by enhancing, expanding, and further developing existing and new educational programs. Considering our community, adult, and youth programs, please select and rate the programming you have participated in.



	POOR	(NO LABEL)	AVERAGE	(NO LABEL)	EXCELLENT	N/A	TOTAL	WEIGHTED AVERAGE
Spirit of Dana Point Tall Ship Program	0.00% 0	0.00% 0	2.27% 3	9.85% 13	46.97% 62	40.91% 54	132	4.76
Marine Science Program	0.00% 0	0.00% 0	1.75% 2	8.77% 10	21.05% 24	68.42% 78	114	4.61
Maritime on the Move: Carpinteria	0.00% 0	0.00% 0	0.89% 1	0.00% 0	10.71% 12	88.39% 99	112	4.85
Docent-led Tour or Field Trip	0.00% 0	0.00% 0	0.86% 1	6.03% 7	25.00% 29	68.10% 79	116	4.76
Love Letters to the Sea	0.92% 1	0.00% 0	2.75% 3	2.75% 3	9.17% 10	84.40% 92	109	4.24
Monthly Lecture Series	0.00% 0	0.00% 0	3.62% 5	10.87% 15	63.04% 87	22.46% 31	138	4.77

QUESTION 15: What would you keep, change, or add to enhance the program(s) you participated in? Please specify which program(s).

There were 62 responses that primarily focused on the Lecture Series, Tall Ship Program, and Love Letters to the Sea. Many respondents took this as an opportunity to share new ideas for programming as well.

- Lecture Series: Would like to have them return in person, would like more of them, keep fun aspects, have them re-broadcast
- Tall Ship Program: Would not change a thing, make it available for adults as well, expand the program
- Love Letters to the Sea: Could be expanded to the entire community

New Ideas:

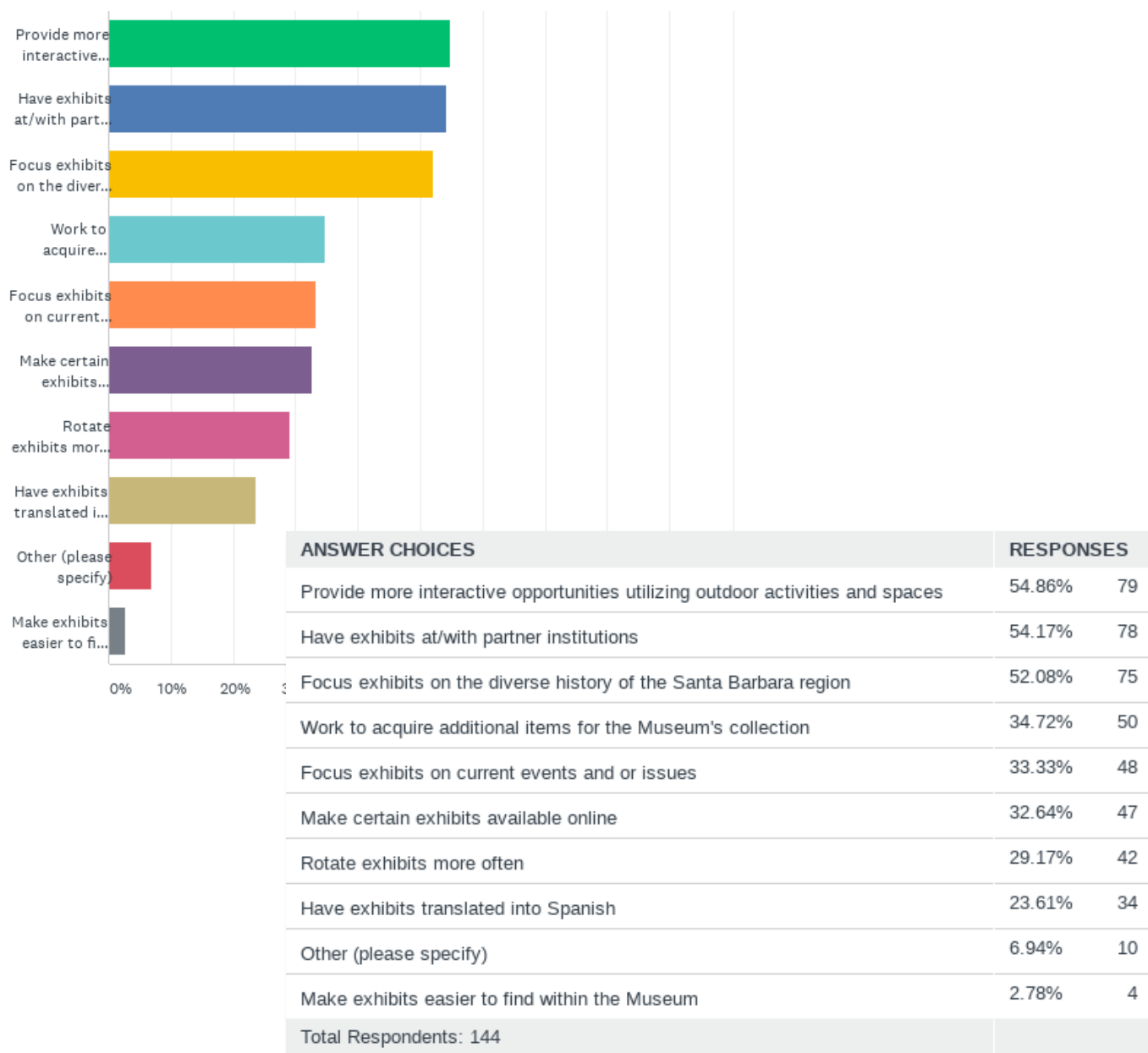
- Focus on reaching a more diverse group of community members
- Interactive experiences for adults
- Seafood tasting event
- Local artists
- More opportunities to get on boats

QUESTION 16: Is there educational programming you would like to see the Museum include?

There were 68 written responses which fit into the following themes. These responses were imaginative, yet consistent with what we have seen so far. The themes receiving more than one response included:

- Climate change: impact, what we must do about it
- Getting outside of the Museum: harbor, beach, scuba and boat trips to the islands, tide pooling, Point Conception
- Partnerships: Condor Express, Channel Islands National Park, Sea Center, local maritime businesses for a “look inside the business”
- Educational opportunities for adults: Maritime on the move, knot-tying or other classes, classes specifically for Seniors
- History of the Chumash

QUESTION 17: SBMM is looking to enhance the collections and exhibits. Which three activities do you suggest the Museum prioritize in the coming years?



OTHER RESPONSES: There were 10 written responses. A couple of comments wanted to have exhibits explaining current events like climate change. Another couple of comments elaborated on having exhibits translated into Spanish by either saying that perhaps not every single exhibit needs to be translated or that if exhibits are translated, it would be best to pair with outreach to the Spanish language audiences.

QUESTION 18: SBMM is seeking to be agile and responsive to the changing business environment as a museum. What suggestions do you have for the museum to create new ways for visitors to access and interact with our exhibits, collections, and the Santa Barbara Channel?

There were 64 written responses, some ideas in which included:

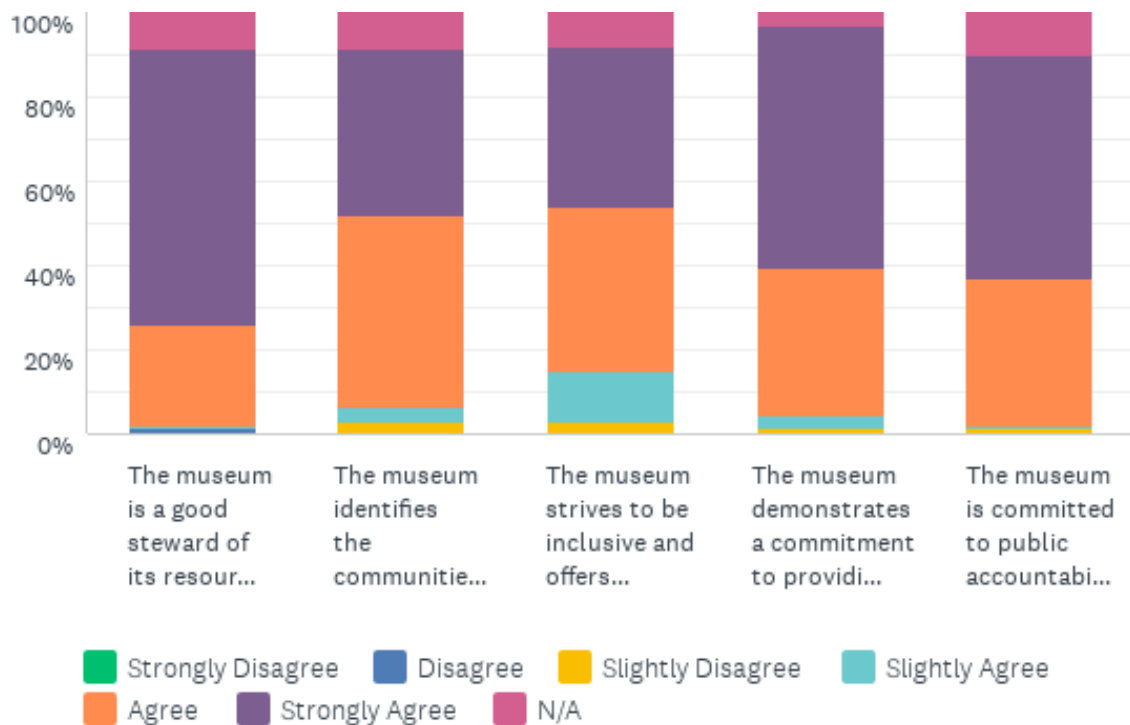
- Outdoor Exhibits / Use of Patio Area / Members Club
 - Reach younger people / Audiences
 - Excursions / Activities away from the Museum / Docent Tours outside
 - More reasons to visit SBMM other than new Exhibits
 - Outdoor Fundraisers / Events
 - Online Auction
 - Planned Giving
-

QUESTION 19: SBMM is in the process of digitizing some of its key exhibits and creating interactive activities such as virtual tours and activities to download. Our goal includes for people to be able to experience some of our collections online. What would attract you to access the Museum's exhibits, collections, and education activities online?

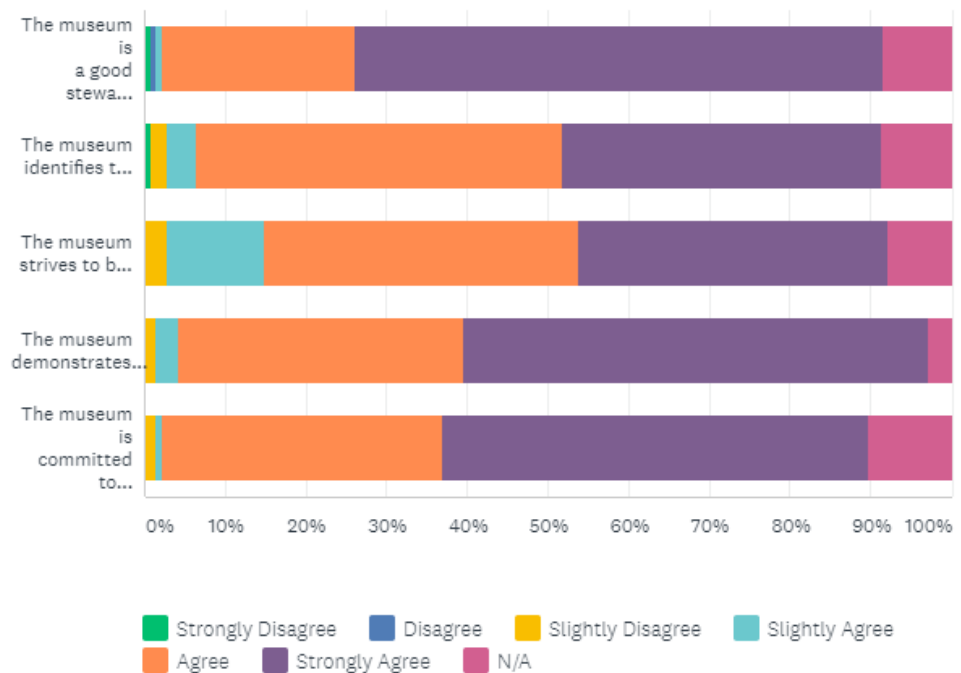
There were 82 written responses which focused primarily on the act of getting online (reminders and easy to find/access) rather than the content that would entice them online. Many respondents simply did not think they would go online to look at an exhibit, while others see online as an opportunity to reach a wider audience. Here are some themes that came up more than once:

- Not likely to view materials online: believe it is better in person
- Reminders/Notifications: Social media, local media, emails
- Easier Access: Make it clear on the website, accessible for all disabilities
- Video: Needs to be good quality, short clips for context or teachers, lectures, real-time video cameras
- Enticing: Needs a compelling reason to go online – interesting topic, catchy titles, etc.

QUESTION 20: SBMM is pursuing accreditation with the American Alliance of Museums (AAM). The AAM standards include an emphasis on “Public Trust & Accountability.” How well do you think the Museum meets the following AAM Standards?



Answered: 142 Skipped: 11

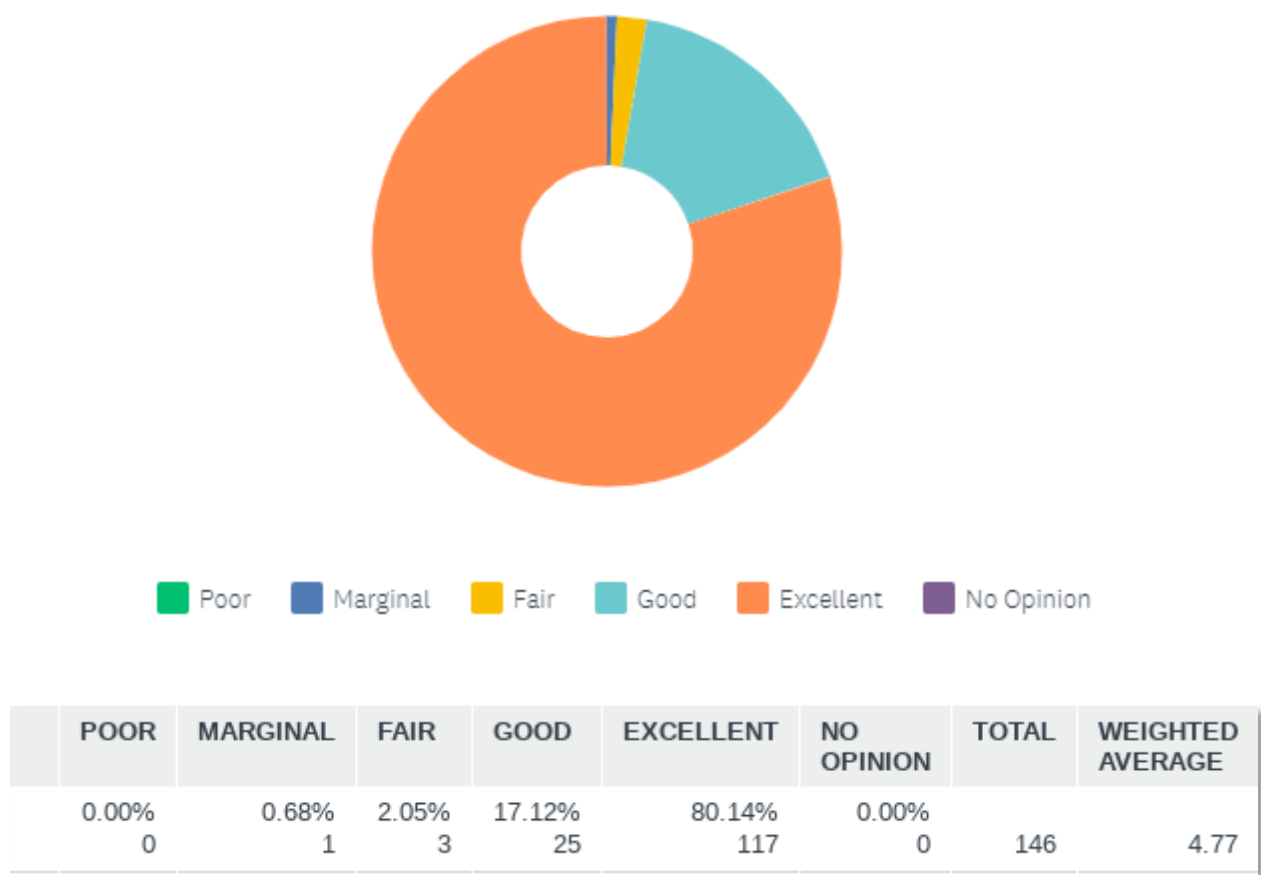


Data chart is shown on the next page.

(CONTINUED) QUESTION 20: SBMM is pursuing accreditation with the American Alliance of Museums (AAM). The AAM standards include an emphasis on “Public Trust & Accountability.” How well do you think the Museum meets the following AAM Standards?

	STRONGLY DISAGREE	DISAGREE	SLIGHTLY DISAGREE	SLIGHTLY AGREE	AGREE	STRONGLY AGREE	N/A	TOTAL	WEIGHTED AVERAGE
The museum is a good steward of its resources held in the public trust.	0.70% 1	0.70% 1	0.00% 0	0.70% 1	23.94% 34	65.49% 93	8.45% 12	142	5.65
The museum identifies the communities it serves and makes appropriate decisions on how it serves them.	0.72% 1	0.00% 0	2.16% 3	3.60% 5	45.32% 63	39.57% 55	8.63% 12	139	5.31
The museum strives to be inclusive and offers opportunities for diverse audiences.	0.00% 0	0.00% 0	2.84% 4	12.06% 17	39.01% 55	38.30% 54	7.80% 11	141	5.22
The museum demonstrates a commitment to providing the public with physical and intellectual access to the museum and its resources.	0.00% 0	0.00% 0	1.44% 2	2.88% 4	35.25% 49	57.55% 80	2.88% 4	139	5.53
The museum is committed to public accountability and is transparent in its mission and its operations.	0.00% 0	0.00% 0	1.45% 2	0.72% 1	34.78% 48	52.90% 73	10.14% 14	138	5.55

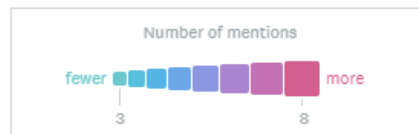
QUESTION 21: What is your overall perception of the Museum?



OTHER RESPONSES: There were 53 written responses in addition to the 146 responses. The written responses largely reflected the positive votes above with praise for the exhibits, staff, management, and evolution of the Museum. Some expressed a desire for more visibility and focus on local audience vs. tourist. There were a couple of people who acknowledged the limitations of staff in accomplishing the big goals but seemed proud of how it is currently ran.

QUESTION 22: What ideas do you think would help SBMM innovate effectively as a museum?

maybe look young Work ideas bring new including people see
interactive exhibits visiting exhibits audiences
museums better interesting Keep community



There were 58 written responses. [What were the responses. This scattering of words, though nice graphic, is hard to interpret.]

QUESTION 23: What would you like to see SBMM do that it is not currently doing?

There were 56 written responses, which fit the following themes:

- Docent Tours
- Reach Out to Spanish-Speaking Audiences
- Cover more about the impacts of Climate Change in its programming

QUESTION 24: Any other questions or comments for SBMM?

There were 41 responses, many of them were praising the Museum for what it has accomplished in the last few years.