

**Chicago History Museum  
Strategic Planning Summary**

**Our Mission**

*(Amended by Board of Trustees, November 3, 2006)*

The Chicago History Museum collects, exhibits, and interprets documents, images, and artifacts related to the history of metropolitan Chicago and the United States.

Our mission is:

- To expand audiences for history.
- To be a leader in history education.
- To be a premier research institution.

**Our Vision**

*(Approved by Board of Trustees, April 16, 2008)*

As the foremost interpreter of Chicago's history, we will enable the public to understand more about the city's past and present and to shape its future.

**"The Critical Path: Strategic Plan for the Chicago History Museum"**

*(Approved by Board of Trustees, July 22, 2009)*

**Collection**

- Improve intellectual control and access.
- Provide an optimal environment for preservation and access.
- Share the collection with wider audiences.

**Audience**

- Invest in regular audience research.
- Identify target audiences and develop appropriate interpretive frameworks.
- Draw on the power of the collection.

**Business Plan**

- Expand membership based on meaningful and personal connections.
- Invest in the staff as the catalyst for achieving our Vision.
- Develop collection-based revenue programs.

**Introduction to  
"The Critical Path: Strategic Plan for the Chicago History Museum"**

**On April 16, 2008, the Board of Trustees adopted the visioning report for the Chicago History Museum: "Claiming Chicago, Shaping Our Future."<sup>1</sup> Since that time, the world has suffered a global financial and economic crisis that has challenged museums and supporters of museums.**

**The time horizon for our Vision is ten years and beyond. Because it is rooted in and inspired by our enduring core purpose and values, its aspirations and guiding principles are as useful today as they were when the Vision was adopted.**

**The time horizon for our Strategic Plan is five years. There is every reason to believe that the global recovery will be measured in years, and not in months. These circumstances require the Chicago History Museum to stay on the critical path. We must move ahead with intelligence and discipline – but when we have a good idea, we will not be shy!**

**For our Museum, our life cycle is in our favor. We already have dramatically enhanced our exhibition and event spaces with our 2006 Museum Rebuilding Project and now we are completing that work with a new American history gallery and initiatives to welcome family audiences into the Museum. We also have transferred materials into our new Broadview Collection Center, which gives us much-needed storage space.**

**Even in challenging times, a disciplined institution can make organic changes in ways that leave it stronger.<sup>2</sup> Since our reopening, certain insights have emerged that point the way forward. Among these are the value of audience research, the continuing appeal of our collections, and the potential for further membership growth and support. These, and other identified insights about our capabilities, will be the foundation of our Strategic Plan for the next five years.**

**We can achieve our Strategic Plan if we follow the critical path and let ourselves be guided by our Vision. Five years from now, we will be strengthened as a collection-driven, audience-driven and business-driven institution.**

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<sup>1</sup> Our Visioning Report, "Claiming Chicago, Shaping Our Future," is posted at <http://www.chicagohistory.org/documents/home/aboutus/CHM-ClaimingChicagoClaimingOurFuture.pdf>.

<sup>2</sup> For more on the organic approach, see Schmidt, Valerie, "Organic Strategic Planning," posted on Dec. 17, 2008, [http://strategic-business-planning.suite101.com/article.cfm/organic\\_strategic\\_planning](http://strategic-business-planning.suite101.com/article.cfm/organic_strategic_planning) ("Organic Strategic Planning transforms a "Find and Fix" mindset into a focus on the organizations desired end results. It creates a foundation for achieving new goals and ideas by leveraging past successes. The organic strategy uses the essence of what has already been proved to work well and what has previously brought vitality and prosperity to the organization.")

**“The Critical Path: Strategic Plan for the Chicago History Museum”**

**Collections**

- **Improve intellectual control and access.**

**Comment:** We will re-evaluate collection policies and procedures, develop plans for optimal use of stored collections, and upgrade collection management systems. Work will continue with collection inventory, data digitization, and backlog processing.

- **Provide an optimal environment for preservation and access.**

**Comment:** Urgent tasks include completing the renovation of East Basement storage and the Broadview Collection Center, both to best practice storage and environmental standards. We also will develop and implement procedures for all storage areas and facilities that guide building security and environment, storage procedures, and access to building and collections. In addition to storing physical objects in a manner that maximizes preservation and accessibility, we will develop and implement a plan for the preservation of digitized assets.

- **Share the collection with wider audiences.**

**Comment:** Improving internal and external access and maximizing use begins with digitizing images of selected museum objects, as well as selected photographic and textual materials. Collection data and selected images will be made available both internally and on the Web. We will link collection images to our own resources such as the ARCHIE search engine and the *Encyclopedia of Chicago*, as well as work with other institutions to maximize collection connections and context. We also need to evaluate and upgrade information technology resources to support enhanced electronic access to and uses of the collection.

## Audience

- **Invest in regular audience research.**

**Comment: We will invest in regular audience research to discover the needs, desires, and abilities of target audiences through CHM products and services. Audience research will become an essential part of the Museum's operations.**

- **Identify target audiences and develop interpretive frameworks.**

**Comment: We will identify target audiences for each product and service and develop appropriate interpretive frameworks that create and maintain meaningful and personal connections to history.**

- **Draw on the power of the collection.**

**Comment: We will draw on the emotional, intellectual, and aesthetic power of CHM's collection to help target audiences make meaningful connections between the past, the present, and the future. We will use our imaginations, scholarship, new technology, and collective expertise to tap our collection's full potential as an interpretive and educational tool and a resource for historical understanding. The CHM's collection is an unparalleled resource for individuals and families.**

## Business Planning

- **Expand membership based on meaningful and personal connections.**

**Comment:** Too often, museum membership is a benefit package and nothing more. Instead, we commit ourselves to a powerful new model of membership that will help people make meaningful and personal connections to history and to the Museum. Membership will be the basic relationship that ties individuals and families to the Chicago History Museum, whatever their diverse interests in the Museum may be. No museum can fulfill its mission alone, and we believe that remaking the membership model is the best way to build long-term support for the Museum and its mission.

- **Invest in the staff as the catalyst for achieving our vision.**

**Comment:** Professional development, lifelong learning, and support of the staff, are investments in the Museum's future. An informed, creative, and diverse professional and volunteer staff will be driven to maximize the Museum's impact and to achieve greatness.

- **Develop collections-based revenue programs.**

**Comment:** The Museum's collection gives value and credibility to the Museum. Original historical materials have an emotional, intellectual, and aesthetic power. Our collection is a unique resource, requiring our imagination and discipline to unlock its hidden value in areas such as licensing digital images and collection-based products.

## **Appendix A – Strategic Planning Task Force Members**

**Collections – Chair, Kathleen Plourd, Andrew W. Mellon Director for Collections**

**Debbie Vaughan, Director of Research and Access, Chief Librarian**  
**Annie Chase, Research Center Assistant**  
**Rob Kent, Senior Collection Manager**  
**Peter Alter, Curator**  
**Don Pasqualini, Director of Technology**  
**Frank DeCurtis, Collection Manager for Fine and Decorative Arts**  
**Maureen McManus, Web Editor**  
**Dominique Tremblay, Collection Manager for Archives, Manuscripts and Visual Materials**  
**Larry Schmitt, Director of Properties**  
**Libby Mahoney, Chief Curator**  
**Julie Katz, Registrar**  
**Nahoko Green, Retrospective Conversion Assistant**

**This Task Force met on August 7, 2008, August 21, 2008, September 4, 2008, September 18, 2008, October 2, 2008, October 16, 2008, October 30, 2008, November 13, 2008, November 27, 2008, December 4, 2008, December 18, 2008.**

**Audience – Chair, Russell Lewis, Executive Vice President and Chief Historian**

**Phyllis Rabineau, Vice President for Interpretation and Education**  
**Melissa Hayes, Director of Marketing and Sponsorship**  
**Rosemary Adams, Director of Print and Multimedia Publications**  
**Tamara Biggs, Director of Exhibitions**  
**Ginny Fitzgerald, Director of Visitor Services**  
**Laura Hayes, Marketing Manager**  
**Akane Henriquez, Ticket and Reservation System Manager**  
**Joy Bivins, Curator**  
**Lynn McRaney, Director of Education**  
**Elizabeth Garibay, Public Programs Manager**  
**Alison Eisendrath, Senior Collection Manager for Special Projects**  
**Leslie Martin, Research Specialist**  
**Dan Oliver, Senior Designer**  
**Heidi Moisan, School Programs Manager**  
**Amanda Stenlund, Editor**  
**Melanie Wang, Coordinator**

**This Task Force met on July 16, 2008, August 13, 2008, October 8, 2008, October 8, 2008, October 22, 2008, November 19, 2008, and December 17, 2008.**

**Business Planning – Chair, Gary T. Johnson, President**

**J. Nathaniel Arata, Director of Institutional Advancement  
Anna Carey, Assistant Manager of Annual Fund and Membership  
Bobbie Carter, Vice President Administration and Human Resources  
Lauren Dolan, Public Relations and Sponsorship Manager  
Beth Hubbartt, Director of Merchandising  
Paula Werlein Jurisson, Auxiliary Relations Manager  
Mary Nora Mavrou, Human Resources Manager  
Rob Medina, Rights and Reproductions Coordinator  
Cheryl Obermeyer, Vice President Finance  
John Russick, Senior Curator  
Rebecca Page, Executive Assistant, Museums In The Park  
Barb Siska, Director of Corporate Events  
Meaghan Spellman, Annual Fund and Grants Manager  
Leigh Stevenson, Director of Accounting**

**This Task Force met on July 25, 2008, August 15, 2008, September 5, 2008, September 26, 2008, October 17, 2008 and November 7, 2008.**

**The Strategic Plan was presented to the following Committees of the Board of Trustees:**

**Collections Committee, January 21, 2009.  
Finance and Audit Committee, October 8, 2008.  
Executive Committee, February 13, 2009.**

**The Strategic Plan was presented to the Board of Trustees:**

**April 22, 2009.  
Approved, July 22, 2009.**