

2013-15

Montana Heritage Commission



Strategic Plan

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Background

The Montana Heritage Commission (MHC) takes pride in managing some of the most valuable and fascinating historic sites in Montana--Virginia City, Nevada City, and Reeder's Alley and the Pioneer Cabin in Helena.

In 1997, the Montana Legislature purchased Virginia City and Nevada City from the Bovey family. Our goal is to promote and preserve these sites while encouraging Montanans, out-of-state visitors, and future generations to become excited about the rich history of this great state. Virginia City and Nevada City represent authentic and tangible examples of the greatest gold strike in the Rocky Mountain West. Virginia City was the site of our first active territorial capital and the MHC offices now occupy the original Montana Legislative Offices.

MHC has two primary missions. The first is to operate and maintain the Virginia City, Nevada City, and Reeder's Alley properties and income-producing assets and artifacts with a goal of financial self-sufficiency. The second is to preserve the Virginia City and Nevada City artifacts and non-income producing assets (e.g., historical or cultural assets). The current value of all Virginia City, Nevada City, and Reeder's Alley assets, including land, buildings, and artifacts, is estimated to be \$41 million. MHC can move toward self-sufficiency primarily by increasing the number of visitors to its sites and by improving and expanding the visitor experiences at these sites.

Strategic Highlights

- According to Montana Office of Tourism, 2013 Traffic Counts, Virginia and Nevada City was Montana's number one state owned attraction. (401,736)
- Over 1.2 Million historical artifacts are housed in 248 historic buildings.
- Local, state and national partnerships help ensure the highest level of expertise, skills and resources available to help achieve goals.
- Volunteers log over 20,000 hours every year in Virginia and Nevada City. This level of volunteer service equates to hundreds of people who give their time for the living history program, archeology field work, guided tours, collections care and management, and restoration work on railroad equipment.
- Marketing programs such as Family Pass and Stay and Play packages and experienced-based activities such as tours, reenactments, Alder Gulch Shortline railroad, and gold panning contribute to increasing revenue streams.
- Educational outreach programs continue to increase with an estimated 5,000 students visiting between May 2013 and June 2104.

Mission

The Montana Heritage Commission preserves and manages historic resources in Virginia City, Nevada City and Reeder's Alley and promotes the appreciation of history through quality visitor experiences.

Vision

To be leaders for cultural heritage tourism, and share authentic Montana history with every visitor.

Purpose

Serve as stewards in managing, developing, and operating Heritage Commission properties by preserving, stabilizing, rehabilitating, interpreting and exhibiting buildings and artifacts; overseeing and encouraging profitable commercial enterprises while creating and maintaining credible relationships with all stakeholders and partners, and protecting these historic resources for the educational benefit and enjoyment of all.

Guiding Principles

As the Commission, we believe:

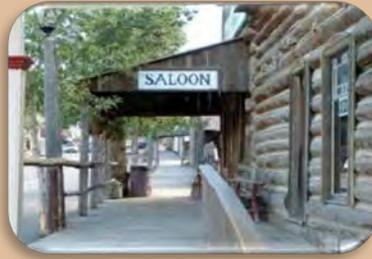
- In saving history through education and the stewardship of buildings and collections.
- That by working together with organizations who share our mission, and with membership and "friends" groups, we can better preserve important parts of Montana's past.
- That through education and interpretation, augmented by hands-on experiences, visitors can learn the value of preserving their heritage, and bring the past alive.
- That heritage resources and private enterprise complement each other.
- That development shall take into account the historic nature of the communities.
- That Heritage Commission properties shall continue to be a living and authentic historic experience.
- That sustainable funding is critical to the success of the Commission's mission.
- That heritage properties are precious public assets and that the public shares responsibility for supporting them.
- That the decision to include additional heritage properties under the umbrella of our commission, must be based on sound economic analysis, addressing the ability of the commission to fiscally manage the responsibility.

Identified Strategic Priorities

- Strategic Priority I** **Preserve:** Establish a more effective system to ensure proper allocation of resources, preservation and maintenance prioritization, and cataloging of Historic buildings and artifacts.
- Strategic Priority II** **Sustain:** Establish a financial sustainability plan that represents balanced reliance on State and Federal appropriations, private funding, and revenue generation in support of achieving long-term sustainability.
- Strategic Priority III** **Promote:** Expand marketing and promotional efforts to strengthen image and identity of the historic resources managed by The Montana Heritage Commission.
- Strategic Priority IV** **Experience:** Enhance visitor's physical experience by providing engaging, memorable, and a unique understanding of where Montana's history began.
- Strategic Priority V** **Partner:** Broaden local, state, and federal support and understanding of the important contribution heritage makes to Montana's economy, cultural identity and sense of historic community.
- Strategic Priority VI** **Manage:** Build the management and strategic capacity of the Commission, Board, Management and Staff to support effective and efficient administrative functioning.

Strategic Priority I

PRESERVE



Managing some of the most valuable and fascinating historic sites in Montana.

Establish a more effective system to ensure proper allocation of resources, preservation and maintenance prioritization, and cataloging of Historic buildings and artifacts.

OBJECTIVES:

- 1.1 Review existing building inventory to ensure accurate referencing and appropriate prioritization of preservation based upon historic building safety, soundness, significance, and focus on revenue generation.
- 1.2 Review existing preservation funding sources, guidelines, standards and practices to ensure appropriate and consistent preservation of historical assets.
- 1.3 Identify and monitor at risk properties to reduce resource and public risk, and to ensure timely maintenance, preservation, and overall safety and soundness.
- 1.4 Collaborate with partners and business owners to establish a more unified approach in the preservation and protection of historical resources.

PROPOSED STRATEGIES:

Objective 1.1: Review of existing building inventory to ensure accurate referencing and appropriate prioritization of preservation based upon historic building safety, soundness, significance, and focus on revenue generation

- 1.1.1 Review existing criteria and move artifacts into an electronic database by 12/2015.
- 1.1.2 Establish list of historically important buildings for prioritized preservation.
- 1.1.3 Determine which assets and artifacts best contribute to and align with overall revenue generation goals.

Objective 1.2: Review existing preservation funding sources, guidelines, standards and practices to ensure appropriate and consistent preservation of historical assets.

- 1.2.1 Identify potential public and private grant opportunities focused on the preservation of historical buildings and artifacts.
- 1.2.2 Revise existing preservation decision making and resource allocation processes to reflect limited resources available for non-critical preservation projects.

Objective 1.3: Identify and monitor high risk properties to reduce resource and public risk, and to ensure timely maintenance, preservation, and overall safety and soundness.

- 1.3.1 Conduct assessment and prepare report on Reader Alley's buildings condition, preservation requirements, obligations, and related risks.

Objective 1.4: Collaborate with partners and business owners to establish a more unified approach in the preservation and protection of historical resources.

- 1.4.1 Establish and distribute recommended guidelines for identifying, conducting, and communicating preservation projects not directly managed by MHC.

Strategic Priority II

SUSTAIN



Ensuring professional care and historical preservation for educational and economic benefit.

Establish a financial sustainability plan that represents balanced reliance on State and Federal appropriations, private funding, and revenue generation in support of achieving long-term sustainability.

OBJECTIVES:

- 2.1 Review and update financial policies and procedures to ensure the successful management and reporting of MHC's activities.
- 2.2 Develop a balanced financial plan to reduce reliance on temporary resources and ensure long-term private and public funding support.
- 2.3 Establish a reserve fund to improve MHC's financial ability to respond to immediate or unexpected needs.
- 2.4 Broaden the relationships and support of local and state representatives by increasing understanding of the importance of historical preservation, education, and outreach.

PROPOSED STRATEGIES:

Objective 2.1: Review and update financial policies and procedures to ensure the successful management and reporting of MHC's activities.

- 2.1.1 Establish initiation and termination procedures for programs, activities and agreements to assess contractual appropriateness, alignment with mission, and ability to meet sustainability expectations.
- 2.1.2 Establish lease renewal assessment procedures to ensure leases are market-based and appropriately prioritized based upon overall benefit.
- 2.1.3 Establish evaluation guidelines for new and expanding programs to ensure resources best serve MHC's mission and contribute toward sustainability expectations.

Objective 2.2: Develop a balanced financial plan to reduce reliance on temporary resources and ensure long-term private and public funding support.

- 2.2.1 Maximize historical, educational, preservation and tourism grant opportunities by hiring a grant writer.
- 2.2.2 Develop corporate sponsor program focused on supporting new projects, improve visitor experience and broader involvement.
- 2.2.3 Conduct targeted assessments, including archeological analysis, to determine feasibility to sell excess land.

Objective 2.3: Establish a reserve fund to improve MHC's financial ability to respond to immediate or unexpected needs.

- 2.3.1 Determine appropriate Reserve Fund level, anticipated \$150,000 and \$200,000, to support maintenance self-sufficiency and non-general preservation of MHC assets and artifacts.

Objective 2.4: Broaden the relationships and support of local and state representatives by increasing understanding of the importance of historical preservation, education, and outreach.

- 2.4.1 Establish plan to increase statewide and interest-based community support for MHC mission.

Strategic Priority III

PROMOTE



Encouraging Montanans and their guests to become excited about the rich history of this great state.

Expand marketing and promotional efforts to strengthen image and identity of the historic resources managed by The Montana Heritage Commission.

OBJECTIVES:

- 3.1 Increase awareness, visitation, recognition, and ease of access to MHC's managed historic assets and artifacts.
- 3.2 Expand use of technology in marketing and promotional efforts.
- 3.3 Broaden the audience that engages with heritage, through expanding and diversifying modes of communication, promotion and attraction.
- 3.4 Continue collaboration with agencies, such as Montana Office of Tourism to leverage available resources, breadth of promotional reach, and partnerships.

PROPOSED STRATEGIES:

Objective 3.1: Increase awareness, visitation, recognition, and ease of access to MHC's managed historic assets and artifacts.

- 3.1.1 Expand promotion of specialty programs, such as Family Pass, to stimulate unique pricing, benefits, and engagement opportunities.
- 3.1.2 Leverage promotional opportunities, such as University archeological digs, to increase awareness and showcase MHC's willingness to partner on mission based projects.
- 3.1.3 Increase public relation efforts to more consistently showcase authentic experiences, educational value, and historical significance.

Objective 3.2: Expand use of technology in marketing and promotional efforts.

- 3.2.1 Secure ability to integrate mobile, social, and video based technologies to increase on-line marketing and promotional efforts.
- 3.2.2 Expand use of technology in relation to the marketing, promoting, and delivering of educational programs.
- 3.2.3 Expand use of technology to create a live inventory showcasing specific historical buildings and artifacts via the website.

Objective 3.3: Broaden the audience that engages with heritage, through expanding and diversifying modes of communication, promotion, and attraction.

- 3.3.1 Establish a series of special fundraising events, such as haunted house attractions at Halloween, to raise funds, attract non-peak time visitors, and increase awareness of MHC attractions and properties.
- 3.3.2 Conduct broader visitor analysis to determine preferred modes of communication, promotion and attraction for targeted demographic groups.

Objective 3.4: Continue collaboration with agencies, such as Montana Office of Tourism to leverage available resources, breadth of promotional reach, and partnerships.

- 3.4.1 Expand efforts to collaborate, partner, and attract tourists from the near-by top MT tourist attraction, Yellowstone National Park.
- 3.4.2 Increase partnering with agencies focused on experience-based promotions.

Strategic Priority IV EXPERIENCE



Exploring the past through living weekends, live theater, ghost tours, artifacts and education.

Enhance visitor's physical experience by providing engaging, memorable, and a unique understanding of where Montana's history began.

OBJECTIVES:

- 4.1 Conduct review of existing services and programs to identify opportunities for experience-based enhancements that are in alignment with strategic goals and add value to the overall visitor experience.
- 4.2 Identify and secure new public and/or private resources to increase financial capacity and support for expanding outreach and online educational programs.
- 4.3 Collaborate with business owners, partners, historians and educators to purposefully enhance visitor's physical experience.

PROPOSED STRATEGIES:

Objective 4.1: Conduct review of services and programs to identify opportunities for experienced-based enhancements that are in alignment with strategic goals and add value to the overall visitor experience.

- 4.1.1 Integrate existing experienced-based program(s), such as *River of Gold*, under MHC's oversight to ensure program(s) longevity and increase revenue generation.
- 4.1.2 Assess feasibility to expand visitor experience and revenue generation by focusing on visitor engagement in, rather than observation of, unique historical experiences, trades, and activities such as horseback riding or blacksmithing.
- 4.1.2 Conduct new activity and program data analysis to ensure revenue and cost projections are accurate; that return on investment is reasonable, and program meets MHC's self-sufficiency or preservation missions.

Objective 4.2: Identify and secure new public and/or private resources to increase financial capacity and support for expanding outreach and online educational programs.

- 4.2.1 Expand current efforts to promote programs, such as archeological digs, ideal for University funding.
- 4.2.2 Identify educational grants and/or corporate sponsors to help supplement expansion of educational based revenue generation.

Objective 4.3: Collaborate with business owners, partners, historians and educators to purposefully enhance visitor's physical experience.

- 4.3.1 Organize and conduct work sessions with business owners, partners, historians and educators to target opportunities for broad-based visitor experience enhancement.

Strategic Priority V

PARTNER



Telling the story of “the nation’s best-preserved example of gold rush era architecture and history.

Broaden local, state, and federal support and understanding of the important contribution heritage makes to Montana’s economy, cultural identity and sense of historic community.

OBJECTIVES:

- 5.1 Target local, state and national agencies and programs that support and foster the advancement of historical education and events in an effort to further integrate and support the MHC’s mission and goals.
- 5.2 Increase ability to advocate for and influence decisions impacting historical preservation and education by recommending the appointment and engagement of council members in support of MHC’s mission and goals.

PROPOSED STRATEGIES:

Objective 5.1: Target local, state and national agencies and programs that support and foster the advancement of historical education and events in an effort to further integrate and support the MHC’s mission and goals.

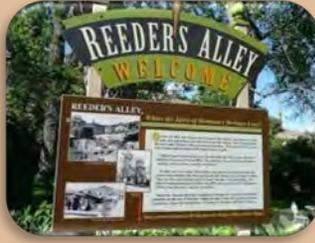
- 5.1.1 Develop and prioritize database of local, state and national agencies committed to the advancement of historical education.

Objective 5.2: Increase ability to advocate for and influence decisions impacting historical preservation and education by recommending the appointment and engagement of council members in support of Commission’s mission and goals

- 5.2.1 Establish advocacy guidelines outlining specific issues, facts, impacts on MHC’s mission, and proposed talking points for MHC members to take back to constituents.
- 5.2.2 Implement mentoring efforts where seasoned MHC members train new members in an effort to broaden understanding of critical issues and shorten an individual’s ability to engage in advocacy related discussions.
- 5.2.3 Expand the manner and frequency of communication to constituents in an effort to increase understanding, share success stories, and gain broader support for MHC’s mission and goals.

Strategic Priority VI

MANAGE



*Honored to care for these
historic gold mining
towns and quaint brick village.*

Build the management and strategic capacity of the Commission, Board, Management and Staff to support effective and efficient administrative functioning.

OBJECTIVES:

- 6.1 Continue refinement and improvement of management systems to foster a continuous evaluation of performance to increasing Commission wide leadership, efficiency and effectiveness.
- 6.2 Expand use of technology and use of data to elevate support of planning, management and advocacy initiatives.

PROPOSED STRATEGIES:

Objective 6.1: Continue refinement and improvement of management systems to foster a continuous evaluation of performance to increasing leadership, efficiency and effectiveness.

- 6.1.1 Conduct annual assessment of roles, responsibilities, and performance measurements to determine if functional alignment is properly supporting MHC's mission and goals.
- 6.1.2 Establish formalized process to review management and operational standards in an effort to continually improve on effective and efficient use of resources.

Objective 6.2: Expand use of technology and use of data to elevate support of planning, management and advocacy initiatives.

- 6.2.1 Identify necessary data to improve operational and strategic decision making.
- 6.2.2 Develop consistency in reports used for management purposes.