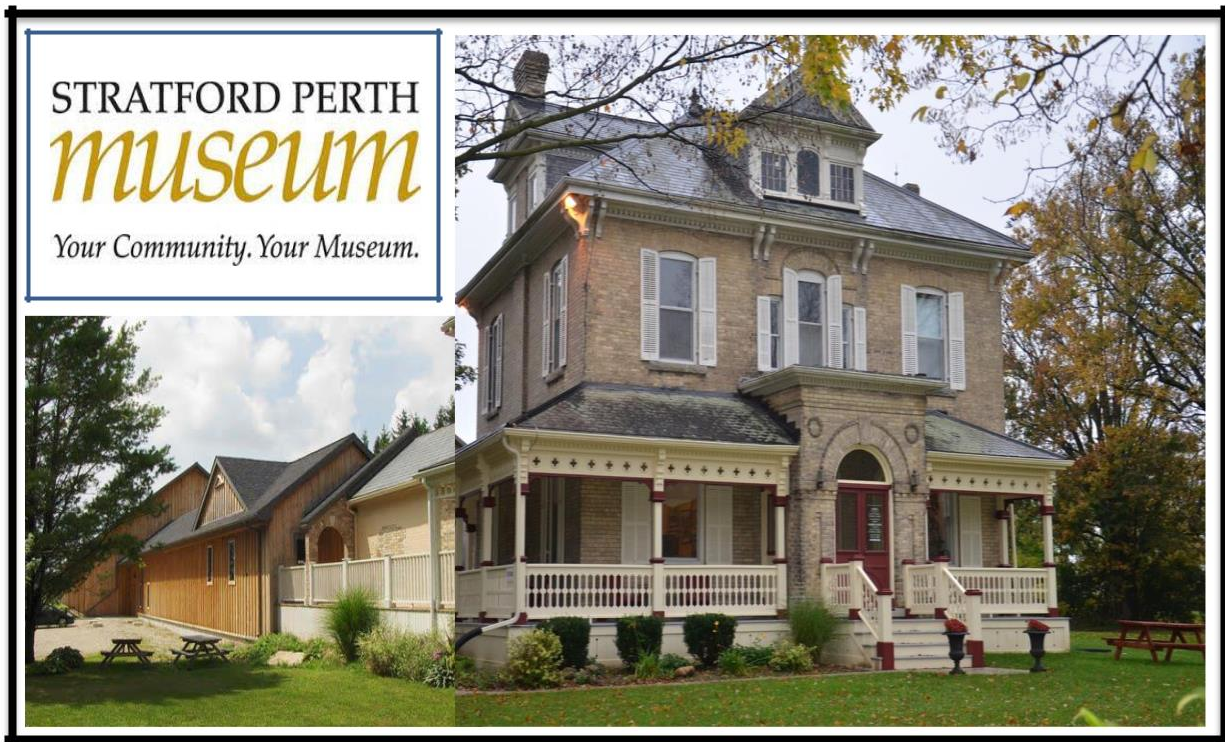


ARTS BUILD ONTARIO
Creative Spaces Case Study Series
Stratford Perth Museum



This Creative Spaces Case Study Series is Supported by:

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Introduction

These in-depth case studies serve as a resource for arts and heritage organizations embarking on a capital project to learn from the successes and challenges of others in the sector.

In these case studies, we analyze the **why** (why they took on this capital project), the **what** (what were they building and creating), the **who** (who are they serving, who supported this project, who led this project and who they hired), the **how** (how was the project financially supported and what positions were created/how were they funded), and the **ongoing** (what happened after? How is the building maintained/operated? Is it sustainable? How is revenue generated?) behind each project.

We looked at a wide range of spaces from across the province with varying operational models, sizes, locations, project sizes and artistic disciplines. The case studies focus on each organization's process for completing their project; from the planning phase, to the building phase, to the operations and maintenance phase. Following the completion of all 19 case studies, a Best Practice Summary released on ABO's website, free for all to access.

The case study series is supported by the Learning Series, which is a collection of webinars and workshops that support ABO's core programs. Webinars that highlight the capital projects featured in the 2018-2020 case studies series are available on the ABO website. Please check <https://www.artsbuildontario.ca/learning/webinars/> for more information.

The case study series is supported by the Department of Canadian Heritage and Canada Council for the Arts.

ArtsBuild Ontario

ArtsBuild Ontario is the only organization in Ontario dedicated to realizing long-term solutions to building, managing and financing the sustainable arts facilities needed in our communities.

ABO offers tools, resources and programs that support arts organizations with their creative space projects. ABO's core programs include Asset Planner for the Arts, the Creative Spaces Mentoring Network, and the Learning Series.

Stratford Perth Museum

Interviewees

- John Kastner, General Manager, Stratford Perth Museum (2013 – present)
- Randy Matthews, current Director & Finance Committee Chair, Stratford Perth Museum
- Ruth (bookkeeper) and Allan Reath, past Directors, Stratford Perth Museum Association
- Wayne Treitz, past Chair, Stratford Perth Museum Association (2012-2014)
- Howard Famme, past Treasurer, Stratford Perth Museum Association (2007-2014)
- Bert Vorstenbosch, past Chair, Stratford Perth Museum Association (2006-2012)
- Charlene Gordon, past Chair, Stratford Perth Museum Association (1993-2002)
- David Stones, past Chair, Stratford Perth Museum Association (2014-2017)

Vision, Mission & Mandate

Vision: “To be recognized as a vibrant community museum, respected for our vital role in preserving, interpreting and celebrating our artifacts, stories and rich cultural heritage.”

Mission: “The Stratford Perth Museum Association is a not-for-profit corporation dedicated to the preservation and celebration of the rich material and cultural heritage of the County of Perth and the City of Stratford. “

Mandate: “The Association operates the Stratford Perth Museum to provide curatorial services for the artifacts and collections placed in its care, and to present public educational exhibits, programs and information which bring to life the history of the region for its citizens and visitors, in accordance with the Museum’s agreement with the City and County.”

Historical Background and Project Summary

A museum for the region, in one form or another, has been in existence since 1903.

Governance was previously handled by the Stratford Public Library, the Perth County Historical Society (later Foundation), the Perth County Historical Board/Stratford Perth Archives, and the Stratford Museum Board. The museum’s collection dates back to the beginning of the 20th century when the Library Act of 1902 permitted local libraries to collect and display museum collections. Two collections made up the majority of the Stratford Perth Museum’s artifacts: the collection amassed between 1900 and 1991 by the Perth County Historical Society/Foundation and jointly owned by the City and County, and the Stratford Museum (the Thomson collection) owned by the City.

With the incorporation of the Stratford Perth Museum Association (SPMA) in 1997, the County and City delegated management of their respective collections to the SPMA effective January 1, 1998. The SPMA continued to acquire artifacts from donors in the County and City but led a nomadic existence. It stored artifacts in various places, offered touring artifacts, and operated exhibits in a series of locations such as Fryfogel Tavern and a factory on King Street. In 1998, members of the board met with a representative of Ontario Realty Corporation, which held the

former Stratford Normal School, adjacent to the Festival Theatre of the Stratford Festival. Tentative arrangements were made to purchase the building for one dollar. Arrangements were underway, however, the province subsequently changed how the corporation divested buildings and SPMA then faced a purchase price closer to real market value which was untenable for them. Board Chair Ron Latham convinced the City of Stratford to purchase the building in 2001. The City appointed a Board of Management to operate what became known as the Discovery Centre. The SPMA continued as a tenant in the Discovery Centre along with the Stratford Festival until 2007. The co-existence of the two organizations was problematic as their respective priorities for the space were largely incompatible and the decision was finally made that the Museum should find its own home.

Several options were investigated, including the donation of a farm property that had belonged to the family of poet James Reaney. This generous offer was ultimately not accepted as the property was considered too isolated to make it easily accessible to visitors. In 2007 the SPMA purchased its present site on the old Huron Road as home for the Stratford Perth Museum. It officially opened on October 16, 2009.

The “What”

[Who owns and operates the Stratford Perth Museum?](#)

The Stratford Perth Museum Association [SPMA], a non-profit charitable organization incorporated in 1997, owns and operates the facility known as the Stratford Perth Museum. The building site, conveniently located just outside the city limit of Stratford, is anchored by an 1870 Victorian buff brick home and includes woodlots and trails, allowing the ability to deliver indoor and outdoor programming.

[What was Stratford Perth Museum Association building and creating?](#)

The SPMA bought the property at 4275 Huron Road (Highway #8, just west of Stratford) in 2008 to consolidate storage of its artifacts and to acquire adequate exhibit space. The original purchase included 7 acres of property as well as a 4,700 square-foot two-storey Victorian brick home, which had most recently been operated as a bed and breakfast. The house was large enough to house permanent and rotating exhibits, a gift shop, reception area, and administrative offices. The property was large enough to accommodate parking, outdoor interpretive trails, and the construction of an 11,000 square-foot facility for collection storage and education programming. In 2014, the SPMA sold 25% or 1.9 acres of the property to the County who needed a location to house the Archives. In 2015 a 10,000 square-foot building was added for the Stratford Perth Archives, making the site an historical campus for regional history and records.

The “Why”

Why did SPMA take on this capital project?

The museum had led a nomadic existence, storing artifacts in various places. Sharing the former Stratford Normal School under the mantle of the Discovery Centre led the SPMA board and volunteers to realize that they didn’t have enough room to grow, to store artifacts, or to stage exhibits. When their lease on the Discovery Centre was not renewed, the SPMA undertook an extensive search after both a Needs Assessment and a Viability Analysis. They had received \$100,000 from a generous benefactor, of which \$20,000 had been spent on curatorial improvements for the Discovery Centre. That left \$80,000 as seed money for the purchase of a property to become the home of the museum. The City and the County jointly agreed to hold a mortgage for the \$585,000 price of the site on old Huron Street.

Why did SPMA engage its community and make a case for the project?

There was remarkable consensus in the community about having a museum to pay tribute to the history and culture of the region. The challenges lay in developing a business model that would allow the operation of the museum to be financially viable. Decades of amassing artifacts with no effective or comprehensive plan to store, preserve, exhibit and share them had become frustrating for the volunteers, the board, the City and the County. Without a home of its own, the Museum wasn’t able to generate significant revenue to defray the costs of preserving its considerable inventory and the City and County were concerned about the ongoing dependency on public funds.

The “Who”

Who does the space strive to serve?

The Huron Road site is now known as an historical campus, serving as headquarters for both the Stratford Perth Museum and the Stratford-Perth Archives. These organizations serve the general public and specifically the citizens of Perth East, Perth South, North Perth, West Perth, Perth County and City of Stratford.

Who led the project?

The board of the SPMA led the project. They were, and continue to be, a dedicated and hands-on working board. The bylaw stipulates a board of minimum 9, maximum 14 directors. For a 2009 grant application, board members’ time was tracked and 12 of them contributed 8,000 hours in a year. A number of directors had significant municipal governance experience, including a former Warden of the Country who was Chairman of the Board during the acquisition of the property and a Board Treasurer who had also served on City Council. Having a well connected board of directors made negotiating financing arrangements with the City of Stratford and the County of Perth a cohesive process.

Who were the key partners in the project?

The City of Stratford and the County of Perth were key partners in purchasing the property. Because the Huron Street location is approximately 300 metres outside Stratford city limits, it was attractive for the County to support. Subsequent to the acquisition, financing was re-negotiated with both City and County to assist with renovations and ultimately to grant the Museum ongoing stable operating funds.

Who opposed the project?

There was no serious opposition to establishing a permanent home for the museum, nor were there any heritage complications about renovating the house. There was, however, concern about the Museum's challenges and delays in developing a financially viable and sustainable operating model which would reduce its reliance on public funding. At times, the timing of key decisions was contentious and subject to intensive questioning by municipal officials, but only for financial viability, never due to resistance to the idea of establishing the Museum.

Who was hired as additional staff?

The SPMA board has always operated with a strategic plan. Additional staff were hired to inform these plans; for example, the founding board had hired Nancy Hushion from Toronto to develop a strategic plan. Her 1998 pioneering report included several observations which governed the SPMA's goals and decisions: that no museum in North America is self-sustaining. Revenues from patron visitations alongside government support is essential to success of the Museum, and the board worked diligently on their relationship with City and County.

Who was on the project team?

Key Players during the acquisition process Included:

- Bert Vorstenbosch, SPMA President and member, Capital Campaign Committee – past Warden of the County
- Howard Famme, SPMA Treasurer and member, Capital Campaign Committee – C.A.; past City Councillor
- Judy Matheson, SPMA Secretary – Manager, Music (Sebringville music retail store)
- David MacKenzie, Capital Campaign Committee Chair
- Gerry Kehl – Deputy Mayor of West Perth
- Marian deWever (member, Capital Campaign Committee)
- Jim Henry (member, Capital Campaign Committee)
- Keith Culliton, representative for the City of Stratford
- Allan Reath
- Steve Riehl Jr (member, Capital Campaign Committee)
- Wayne Treitz (member, Capital Campaign Committee) – former Global Director, 3M

- David Stones (member, Capital Campaign Committee) – former President & CEO, Childhood Cancer Canada

The staff team consisted of:

- Linda Carter, Director-Curator
- Jay Bodrog, Assistant Curator
- Will Kernohan, Educator Coordinator

Who was contracted for the project?

The project was entitled the Stratford-Perth Museum Relocation Project. No project manager was engaged, however Victorian Details was hired for renovations to the house, as well as Vic's Contracting for new construction.

The "How"

How did the project go from concept to construction?

Prior to the purchase, costs for studies in traffic, zoning, and signage as well as site preparations and insurance were incurred to comply with bylaw and purchase requirements. Site preparations included water management, environmental assessment, soil and survey reports, lawn seeding, as well as creating a gravel parking lot, sidewalks, and entrances. The Board's priority was to complete the amalgamation of the collection so the priority for the site was the construction of an addition as storage/education centre.

How was a construction plan formed?

The contractors' work was accomplished in three parts, beginning in 2008 and finishing in 2009:

Phase 1 – renovation and upgrades to the house included all bathrooms and bedrooms. The house had been operating as a bed and breakfast and had to be renovated to be suitable for other purposes. Renovations also included code upgrades for the sprinkler and electrical systems, and a security system including security window film.

Phase 2 – new construction to add an 11,000 square foot addition as a storage/ education centre behind the house and an elevator to the main house.

Phase 3 – new construction to connect Phase 2 to the main house. The original concept did not include connecting the addition to the house, but plans were revised to include a covered walkway with a ramp between the two buildings – named the Exhibition and Programming Wing.

How was accessibility included in the project?

An elevator was added to the main house and a ramp was included in the Exhibition and Programming Wing.

How was energy efficiency and the environment incorporated?

An environmental assessment and a water management report were completed as part of the site preparations.

How were contingencies managed?

The biggest funding setback experienced was not receiving \$400,000, or 50% of the total project cost from the Canadian Cultural Infrastructure Fund (CCIF). This request was denied on the grounds that the matching amount (\$400,000) had not been raised at the time the application was filed, but renovations had begun nonetheless. Special appeals to the City and County resulted in a second mortgage on the property of \$240,000 from the City and \$160,000 from the County.

How were day-to-day operations impacted?

The Museum didn't open until major renovations were complete. Day-to-day operations were focused on preparing moving the collection, maintaining offsite exhibit activity such as educational programming and special events in support of operating funds.

How was the project funded?

The City and County jointly agreed to a mortgage of \$585,000. The Museum contributed approximately \$500,000 through donations, an endowment fund, a reserve account, and fundraising events. The City of Stratford agreed, somewhat reluctantly, to \$240,000 and the County of Perth agreed to \$160,000 as a second mortgage to bridge the funding gap that arose when the CCIF request was unsuccessful. The elevator cost \$131,525, and was funded by the federal Enabling Accessibility and Ontario Trillium Foundation. The cost of the property was \$1,549,256 by the end of 2010.

How were programs managed during construction?

The Museum continued to offer existing offsite programs such as educational programming and kits, as well as the Steam Team that took the Museum's steam engine to community events around the region.

The "Ongoing"

How did Stratford Perth Museum project new financials?

Bookkeeping for the SPMA was done gratis for at least 15 years by a volunteer who had served on the board of directors. The Museum operation needed an infusion of expertise in how to generate revenue from admissions, programming, exhibits and ancillary activities such as a gift shop. The board was dedicated and hard-working and followed due diligence with respect to regular meetings and minute-taking, however there was no staff or board member at the time that had expertise in how to engage the community with the Museum and its new headquarters. Subsequently, the focus remained inward, on collecting and preserving artifacts. Prior to the new space, earned revenue from exhibit admissions averaged approximately \$4,500 annually. The new space was anticipated to generate considerably higher revenue but no special plans were developed to realize this goal. Higher attendance numbers weren't seen until in the first year after opening. The Board eventually realized that merely establishing a new home for the Museum wasn't sufficient to generate higher earned revenue, and that adjustments were needed in the organizational structure to acquire missing skills and roles.

Were new staff hired after the new space opened?

Once the space opened, a part-time custodian was hired. The volunteer bookkeeper was paid a monthly retainer for their services, which she consistently donated back to the SPMA. The major change concerned the expertise needed in operational leadership. The Museum had been served well by staff with excellent curatorial and preservation skills but now needed a community-oriented manager who understood the imperative to generate earned revenue. In 2013, an entrepreneurial former journalist with experience in capital projects and community connections was hired. He made a few intuitive initial changes to the pedestrian traffic patterns through the Museum. These included moving the main entrance from the front door of the house to one on a path directly from the parking lot. This and a myriad of other adjustments which improved the layout of the exhibition areas, contributed to an increase in paid admission from 853 visitors (\$6,873) in 2013 to approximately 20,000 visitors (\$66,310) in 2018.

Once the home for the Museum was obtained and renovated, membership on the board was replenished. New arrivals brought experience and expertise in financial and business acumen to address the weaknesses in the Museum's initial operating model. Individuals with international business experience, marketing, communications and particularly strategic planning expertise moved into senior governance positions on the board. With this infusion of new skills, the board recognized that a detailed strategic plan with more structure, substance, and accountability was required as an anchor to help identify business and program priorities. One of the newest recruits, who ultimately became Chair, took the board through an offsite session dedicated to setting a direction for the Museum. The theory espoused by the board at that time was that "you can either let the future take its course and establish where you're going and what you're going to be, or you can create your own future through sound planning and determination." The board reasoned that since the Museum now had a home, the time was

“now” to capitalize on the relocation and optimize the use and potential of the new space to its fullest. The development of a clear, articulated blueprint that would map out the Museum’s strategic direction for the next five years became the order of the day. This resulting plan, “Creating Our Future”, redefined the Museum’s mission, vision and operating values, as well as articulated the five core strategies for the coming planning period with attendant strategic actions to breathe each strategy into reality. An operational plan for each action spelled out an accountability name for each required outcome, while an interdependency table identified suggested timeframes and where and how the close to 40 actions would work collectively to bring about the core goals of the overall plan. A final chapter of “Creating Our Future” stipulated how the plan was to be monitored at the Board level and how success was to be defined and measured. Both plans can be found in the References section of this case study.

[Did the new space provide a new revenue source?](#)

With the “Creating Our Future” plan guiding them, the board hired a new general manager in 2013. Since then, the Museum team – who consisted of an effective board that delivers on the accountabilities identified in the strategic plan, and a professional staff under the new leadership of the general manager - now generate over 40% of total revenue from admissions, programs, fundraising, memberships, donations and grants. An ongoing funding agreement with the City and County has been established, adjusted only by the annual rate of inflation. The strategic plan is consistently revisited and updated every few years by the (now former) board member who first guided the board into “Creating Our Future”, while a subsequent initiative resulted in a detailed Site Plan to guide the Museum and its board in ensuring the highest and best use of every square foot of the Museum’s site. The core strategies of each strategic plan are made publicly available on the Museum’s website.

[How is the Stratford Perth Museum being maintained and operated?](#)

Since 2013 the Museum has completed many annual capital projects with assistance from funders such as Canada Cultural Spaces Infrastructure Fund, Stratford Rotary Club, and Stratford Community Foundation. These have been built into the annual operating budget, averaging about \$50,000 per project, and are declared to the City and County as capital improvements, although the Museum is solely responsible for funding them. These projects include changing lighting in the entire building to LED; relocating administrative offices and lunchroom; replacing radiant gas heaters with high efficiency forced air including air conditioning; transitioning part of the storage addition to become a performance space; adding security cameras; and installing a backup generator.

Operating costs in 2013 were approximately \$380,000, of which utilities were \$15,500 or about 4%;

Operating costs in 2018 were approximately \$517,000, of which utilities were \$12,670 or about 2.5%

The Stratford Perth Museum currently uses Asset Planner for the Arts, an asset management program available through ArtsBuild Ontario, to track and plan for building replacements.

Lessons learned in the first 90 days?

The SPMA board felt that the community would flock to the new location for the Museum, but they did not. This slightly naïve and passive approach to attracting visitors to the site took several years to refocus, requiring changes in both board and staff with more strategy on community, marketing and promotions.

Lessons learned in the first year?

The board of SPMA realized that there was duplication in the areas of curatorial and preservation skills and fundamental gaps in marketing, community engagement, and programming from senior staff leadership. Their appreciation of the existing staff's dedication made it difficult to enact the necessary changes in job descriptions to equip the Museum with the needed expertise, and as a result, this adjustment took several years to realize. As membership on the board was replenished, new recruits brought new talents in financial and business acumen that were appropriate to address the gaps in the Museum's initial operating model. Individuals with international business experience, marketing and communications skills moved into senior governance positions on the board. Over the next few years, these individuals were hands on in operating the Museum site, resolving such practical issues as meeting provincial requirements to have the driveway paved from the highway to the parking lot. An updated strategic business plan was developed as the guiding document for both board and staff decisions, and is still updated on a regular basis.

Case Study Summary

Opening the Stratford Perth Museum in October 2009 was a triumph for all dedicated to realizing the dream of preserving and celebrating the rich material and cultural heritage of the County of Perth and the City of Stratford. Yet, the dream was only partly realized initially as the focus remained on curatorial and preservation matters. Completing the dream took approximately another four years, during which the missing skills were identified, financing models were stabilized and a general manager was hired who recognized unique programming opportunities derived from good working relationships with arts colleagues and local businesses. The Museum has now transitioned to exhibits of wider and even international interest such as the Anne Frank House exhibit, an Inuit art exhibit from the Art Gallery of Ontario and the Franklin Expedition display from Parks Canada and the Royal Ontario Museum, and most significantly, the exhibit showcasing Stratford native Justin Bieber, Steps to Stardom, which debuted on Family Day 2018. The Bieber exhibit has been extended until at least the Fall of 2019 and continues to break financial records for SPMA. Additionally, the museum has become a venue for book launches, speakers, adult learning events, March Break and PA Day camps, weddings, and public sessions for every level of government. The founding board's

pioneering strategic plan has finally realized one of its author's observations – people now ask to serve on the SPMA Board of Directors!

Resources

The following resources below have been provided by the Stratford Perth Museum as additional information for readers:

Website

- [Stratford Perth Museum](#)

Documents

- [2010-13 Strategic Plan – Creating Our Future](#)
- [2014-16 Strategic Plan – VISTA](#)
- [2017-21 Strategic Plan – Legacy](#)
- Annual Reports – [2015](#), [2016](#), [2017](#), [2018](#)
- [Case Study: Using Asset Planner at the Stratford Perth Museum](#)

ArtsBuild Ontario Webinars

- Volunteer Boards and Creative Space Projects
 - [Recording](#)
 - [Transcription](#)
- Securing Permanent Space – Stratford Perth Museum and The Theatre Centre
 - [Recording](#)

Video

- [Stratford Perth Museum 2018](#)