



Sustaining the Vision  
Strategic Plan Update 2012- 2015  
Dr Pepper Museum and Free Enterprise Institute

## **INTRODUCTION**

The Dr Pepper Museum and Free Enterprise Institute was founded in 1988 as a private non-profit organization governed by a Board of Directors selected by its membership. Housed in the 1906 Artesian Manufacturing and Bottling Company building listed on the National Register of Historic Places, the Museum opened to the public in 1991, and the W. W. Clements Free Enterprise Institute opened to the public in 1996.

For over two decades the Museum has been a unique cultural and entertainment asset to the City of Waco and Central Texas, and has served as an educational institution dedicated to the teaching of the principles of the American system of free enterprise economics. Over the years the professional staff and dedicated Board of Directors have developed and expanded the collection to include several major soft drink memorabilia and industry archival collections. The campus has also been developed by adding additional parking, an events courtyard, and by purchasing and renovating a related building for additional exhibits and offices.

In 2008 the Board of Directors approved a three year Strategic Plan to guide the organization through 2010. In August 2011 the Museum engaged Quintanilla Schmidt Consulting to update and refine the Museum's strategic goals for 2012 through 2015. The scope of work included electronic surveys sent to staff (63% return) and Board (32% return), a separate survey sent to over 1300 randomly selected visitors and online customers (14% return), and 23 personal interviews with key stakeholders. Quintanilla Schmidt presented a preliminary analysis of the data to the Executive Committee of the Board on September 29, 2011. Working with the Executive Director on the framework and format for updating the plan, Quintanilla Schmidt led the Board in a mini-retreat and discussion on October 13, 2011. The final draft for full Board comment was circulated in mid-January in advance of the Board Retreat on February 4, 2012.

The final updated plan will be ready for adoption by the Board of Directors by February 20, 2012.

## **MISSION STATEMENT**

The Museum's mission is to educate and entertain the general public through the collection, preservation, interpretation, and exhibition of objects relevant to the history of the soft drink industry, and through that example, the free enterprise economic system.

To further the mission, the Free Enterprise Institute was created in 1997 for the purpose of educating Texas school children and adults about the economic system that underlies American life. Thousands of students from as far away as San Antonio and Houston visit the Museum and Institute on field trips, learning elements of economics and free enterprise in guided tours.

## **VISION STATEMENT**

The Dr Pepper Museum and Free Enterprise Institute is dedicated to being the finest museum in the world devoted to telling the story of the soft drink industry and to using this industry as a practical model of the free enterprise system.

## **SUMMARY**

The 2008 - 2010 Strategic Plan identified ten strategic imperatives, nine which achieved notable progress and one imperative accomplished—eliminate debt. Significant progress was achieved on three others: clarify roles, responsibilities, and organization of the Board of Directors and staff, outline plans for the collections, and define exhibit philosophy and long-term exhibit plan. The remaining 2008 imperatives have been revised in 2011 into the four strategic goals for 2012 – 2015. The 2008 strategic imperative, extending the influence of the Free Enterprise Institute, is part of the mission and vision of the Museum and is presumed to be a priority for education and public programs as a part of the goal of increasing audience and attendance.

## **STRATEGIC GOALS 2012 – 2015**

Surveys, staff discussions, personal interviews and a mini-retreat with the Board of Directors were the tools used to develop the four updated strategic goals to move the museum forward through 2015:

- Build and Strengthen the Board and Staff
- Increase Endowment
- Increase Audience and Attendance
- Finish the Campus

2008 -2010 GOAL: Clarify Roles, responsibilities, and organization of the Board of Directors and Staff

REVISED GOAL: Build and Strengthen the Board and Staff

The health and sustainability of the Museum is dependent on the quality and commitment of its Board of Directors and professional staff. The role of the Board is to ensure that the Museum functions within the appropriate framework to further its mission, that its resources are adequate, and that there is appropriate oversight of assets. Identifying, recruiting, and electing Board members who have the requisite skills and experience to move the Museum’s mission forward is critical for the continuing success and development of the Museum.

Objective/ Strategy:

- Develop a Board matrix to evaluate the skills sets of current Board members, and determine the skills needed to strengthen the Board to achieve its goals
- Balance the Board to reflect demographic, geographic, age and gender diversity
- Cultivate and recruit Board members in coordination with Leadership Waco
- Actively engage mission driven Board members from the soft drink bottling industry, suppliers, and related fields
- Engage professional fundraising counsel to train and motivate the Board
- Develop a codified succession plan to transition key Board members to non-voting advisors to continue networking connections on the Board
- Establish an Advisory Council of Distinguished Directors
- Codify a Board orientation and training program to ensure all Board members are informed and clear on roles and responsibilities of the Board and staff
- Build Board and staff relationships with key corporate leaders
- Develop a codified succession plan for senior staff positions

## 2008 -2010 GOAL: Increase Museum Endowment, Maintain the Facility

### REVISED GOAL: Increase Endowment

The establishment and nourishment of a permanently unrestricted endowment fund composed of cash, securities or other assets will provide a source of unrestricted baseline income for planning and operational sustainability. The establishment of donor restricted endowment funds, or a term endowment, can provide funding for specified projects and time frames.

#### Objective/ Strategy:

- Define Board designated endowment: for intended use and size (to support a percentage of operating costs, maintenance and leasehold improvements)
- Set a specific goal each year to increase the unrestricted operating endowment by \$1.25 million in 3 years
- Increase designated endowment in phases for building and maintenance, for the Free Enterprise Institute and new initiatives, and for collections support
- Develop a scholarship endowment fund for schools and students of all ages to participate in Museum programs
- Hire an experienced Development Officer/staff/ engage professional fundraising counsel to focus and motivate the Board on endowment development
- Develop a detailed fundraising action plan and set specific fundraising goals

2008 -2010 GOALS: Develop Strategic partnerships, identify audiences for programming, marketing and community collaborations, extend influence and impact of the Free Enterprise Institute

### REVISED GOAL: Increase Audience and Attendance

Audiences participate in the Museum because participation in some way meets their needs. The challenge for the Museum is to know who their various audiences are, what their needs are and then to design and implement exhibit offerings, programs and activities that meet their needs. The corollary to this goal is to insure the existing and potential audiences are aware of what the Museum has to offer to meet their needs using targeted methods of communication that the various audiences use and trust.

#### Objective/ Strategy:

- Survey and evaluate the Museum and its operations
- Set a goal to increase general audience, casual and impulse visitors to the Museum through targeted PR, marketing and way finding
- Develop a marketing plan to increase radio presence, local area and Central Texas TV presence, and promote the Museum through paid advertising
- Cultivate tourism officials from metro areas
- Increase motor coach tour visitors
- Set an annual goal for increasing merchandise sales
- Offer food options for on-site snacks/ lunch
- Develop a mobile Dr Pepper Museum outreach vehicle to offer floats and drinks at community and regional events
- Develop a profile on the social coupon networks to offer deals and discounts associated with the Museum and its mission
- Develop a stronger profile on Facebook, Twitter for events

- Develop community service PSAs for Museum branding
- Develop a self-directed, self-guided tour for the Museum
- Develop a docent/volunteer program

2008 -2010 GOAL: Finish the campus

REVISED GOAL: Finish the Campus

The development and maintenance of facilities and visitor amenities is a part of fulfilling the Museum's mission by enhancing productivity, providing visitors and staff with an experience that meets their needs and is enjoyable, educational, exciting and safe. A well developed and maintained campus ensures good stewardship of the collection, consistency in operations, and supports opportunities for programs while planning for meeting future needs to move the mission forward.

Objective/ Strategy:

- Define stages of completion and establish phases
- Develop an operational and program plan for the evolution of the campus
- Complete the east side of the campus (the east side of the campus (Kellum-Rotan building)
- Revise and refresh exhibits and galleries in existing Dr Pepper Museum galleries
- Enlarge/ expand parking lot
- Finish the east side of the campus (the east side of the campus (Kellum-Rotan building) exhibit galleries
- Building connection
- Build the Clock Tower

## CONCLUSION

With the approval of the *Sustaining the Vision Strategic Plan Update*, the Board of Directors reaffirms its commitment to entertain and educate its visitors about the history of the soft drink industry and the principles of the American system of free enterprise economics. The updating of the strategic plan every three to five years will give the Museum Board and Staff the opportunity to acknowledge and celebrate accomplishments, revisit and revise goals, and adjust the path for the future. A scheduled update to the strategic plan every three to five years will also serve to deepen community and donor relationships, strengthen commitment to the mission, and renew the energy of the Board and staff.

## **LIST OF APPENDICES**

### Surveys and Interviews

- PowerPoint of Survey highlights
- Aggregated Staff, Board and Audience survey results
- Stakeholder interview list

### Mini-Retreat

- Agenda
- Table assignments
- PowerPoint

### Work Plan 2012 – 2015

- Build and Strengthen the Board and Staff
- Increase Endowment
- Increase Audience and Attendance
- Finish the Campus

### Committee Assignments

- Development and Resources Committee
- DP Museum Enterprises Committee
- Executive Committee
- Facilities and Services Committee
- Finance and Audit Committee
- Free Enterprise Institute Committee
- Interpretation Committee
- Nominating Committee
- Soft Drink Industry Relations Committee