



THE UNIVERSITY OF  
**TENNESSEE**  
KNOXVILLE



# **McCLUNG MUSEUM**

*of Natural History and Culture*

**Strategic Plan | 2023 – 2026**

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# Introduction

The McClung Museum of Natural History and Culture is an academic museum on the campus of the University of Tennessee, Knoxville, the flagship campus of the UT System. The campus serves more than 30,000 students each year. The McClung Museum, which reports to the Office of the Provost, serves the university and communities connected to Tennessee with onsite exhibitions, virtual instruction and collection-based research in both natural history and culture. In addition, the McClung provides onsite, offsite, and virtual instruction for thousands of local K-12 school children each year in collaboration with Knox County and other neighboring school systems.

The McClung Museum is a Smithsonian Affiliate and the only natural history museum in the region. The McClung is also one of only two Knoxville museums accredited by the American Alliance of Museums (AAM). Through this accreditation, we follow AAM's Code of Ethics. Part of this plan also includes the creation of a new code of ethics specific to the McClung.

The McClung houses four distinct collections: archaeology, malacology, paleoethnobotany, and arts and culture. The collections housed within the museum and the research produced in association with them is done through the ethical keeping, care, and respect of the objects that we steward. Our current collections policy can be found on our website [mcclungmuseum.utk.edu](https://mcclungmuseum.utk.edu).





# Strategic Planning Process

We began the strategic planning process in the Summer of 2021. Working with consultant Dina Bailey from Mountain Top Vision based out of Atlanta, GA, Phase I consisted of eight focus groups with community partners followed by five one-on-one interviews with major partner leaders. The eight focus groups were the McClung Museum's Board of Advisors, community and education leaders and partners of Knoxville, arts and culture leaders and partners of the area, past and present McClung and UT Knoxville students, university department and unit leaders, research-based partners, diversity-based partners, and visitors. The five interviews were done with the Provost, the Dean of Libraries, a major donor, a senior arts leader in Knoxville, and a senior Tennessee Valley Authority (TVA) leader. All focus groups and interviews were facilitated by Bailey with no museum staff present. Following interviews and focus groups, findings were summarized by Bailey and presented to the McClung staff.

The second phase of strategic planning took place over the 2022 spring semester and into the summer. This included breakout focus groups with museum staff, all-staff retreats, and executive committee meetings as facilitated by Bailey. Each gathering worked towards crafting and redefining the museum's mission, vision, purpose, values, and the primary communities to focus our service moving forward.

Through this process, the museum hopes to grow, shift, and change for the better by continuing to share stories and facilitating the exchange of ideas to awaken curiosity in service of the university and communities connected to Tennessee. This is a three year plan which will begin in January 2023 and is expected to end at the conclusion of Fiscal Year 2026.







## From the Museum's Executive Director, Claudio Gómez

The team at the McClung Museum worked carefully and thoughtfully towards crafting this plan, and we are excited to begin and see this work through. Although ambitious, I know that we are up for the challenge as we strive to facilitate the partnerships and connections that make us who we are as a museum.

As a museum that serves both the university and many other communities around us, we face unique challenges. I am confident that this strategic plan will allow us to stay on course and serve our communities in meaningful and creative ways. I am thankful to all our partners on campus, in East Tennessee, and beyond, who continue to challenge and support the museum so we can have new opportunities to learn, adapt, and grow, and who will keep us accountable during the implementation of this plan.



I am grateful to Dina Bailey for her patience, care, and wisdom while guiding us in this process; to Humanities Tennessee, for the SHARP grant we received to fund the preparation of this plan; to Dr. John Zomchick, Provost and Senior Vice Chancellor, for his continuous support to the museum; and to our members, donors, and sponsors, for their generosity in helping us being adventurous and engaging.

Finally, I am grateful to all the museum employees, graduate research assistants, student workers, and volunteers, for their ongoing work and commitment to the McClung Museum.

Claudio Gómez

McClung Museum of Natural History and Culture  
Jefferson Chapman Executive Director

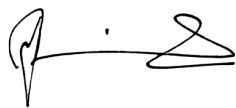


## From the University's Provost, Dr. John Zomchick

The McClung Museum plays a critical role in the University of Tennessee's land-grant mission by bringing knowledge of the natural and cultural past to diverse communities. Not only do the museum's collections provide research opportunities for university students, but they also serve as educational resources for the thousands of K-12 students and other visitors who pass through its galleries. The McClung Museum is a unique and prized part of our campus.

This Strategic Plan described in the following pages is the result of a planning process spanning several months, representing hard work and dedication by staff, students, faculty, partners, and community members. I want to extend my heartfelt thanks to everyone who participated in this process. The plan's goals and objectives outline a series of initiatives through which the museum will leverage the power of place to deepen visitors' engagement with natural and cultural history. It provides a roadmap for the museum to increase community engagement and educational opportunities in an ever-changing social, cultural, and educational landscape. When executed, the plan will strengthen relationships with key audiences and advance archaeological and biological research. Because of the museum's archaeological collections from Southeastern Native American cultures, it is essential that we work to strengthen our commitment to honoring the Native Nations that historically inhabited this land. This plan does that.

I am pleased to present this plan to the reader. I hope that all share in my excitement for the future of McClung Museum of Natural History and Culture.



John Zomchick  
UT Knoxville Provost and







## From Mountain Top Vision CEO, Dina Bailey

The first three words that come to mind when I think about the McClung are: commitment, growth, and transformation. Over the year and a half that I have worked with the McClung team, I have seen their commitment to listening, adapting, and trying new ways of thinking and working. I have been a witness to the ways in which they have grown more strategic and more nuanced in their discussions; and, how they have moved from concepts to statements to actions as they have begun to authentically transform what it means to be the McClung.

As with any transition of leadership, interpersonal dynamics, and ways of working, there have been bumps along the way - and there will naturally continue to be as long as the McClung staff continue to stretch themselves to uphold the promises they've made within their vision, mission, purpose, and values. I have been honored to get to know the staff, some of the communities in which they work, and the university through this process. And, I am proud of the efforts every staff member has made to be courageous in surfacing ideas, feelings, and concepts along the way.

As the impact of this strategic plan ripples out in the connections, partnerships, and actions of the future, I am confident in the McClung's staff and their ability to follow through as an adaptive, transparent, responsible, and collaborative organization. I hope that all who come in contact with this strategic plan see the intentionality, hard work, and clarity embodied here.

*Dina Bailey*

Dina Bailey  
Mountain Top Vision CEO





# OVERVIEW

## Vision

Our vision is to be a space for convergence, discovery, and collaboration, defined as:

**Convergence:** Welcoming multiple perspectives and worldviews.

**Discovery:** Gaining new understanding and provoking thought.

**Collaboration:** Building relationships through intentional listening.



## Mission

We share stories and facilitate the exchange of ideas to awaken curiosity in service of the university and communities connected to Tennessee.

## Purpose

We lead by amplifying conversations to provoke thought and gain understanding of humanity and the natural world in service to our communities.





## Values

**Value 1: Adaptive** - We are flexible to change and open to new ideas, museum trends, and academic/cultural shifts. We consistently evaluate our intentions, practices, and impacts in order to meet our communities' needs.

**Value 2: Transparent** - We are forthcoming with our communities and public partners, donors, and the university.

**Value 3: Responsible** - We are compassionate and ethical in decision-making and in our shared authority with our communities.

**Value 4: Collaborative** - We build relationships through active listening and conversation, welcoming multiple perspectives and worldviews.



## Primary Communities

We believe in being welcoming to all, authentically inclusive, and amplifying a sense of belonging whenever we can. The Primary Communities, listed below, are not meant to be exhaustive and they are only listed in alphabetical order. As we implement this plan, we will continue to seek opportunities to develop specific connections and relationships with new communities in Tennessee.

**Intergenerational Learning Communities** - Intergenerational learning is a form of informal learning, which is related to questions of cultural and local identity and social cohesion. Communities of particular interest are public schools; educators; Spanish-speaking families; Black, Indigenous, and people of color; and senior adults.

**Native Nation Communities** - Native Nation communities include a range of potential partners. This plan emphasizes Leaders of Native Offices, Native Museums, Native Educators and schools, and Native artists/artisans/craftspeople.

**UT Knoxville Students** - As part of the university, students are a core stakeholder group, and we strive to connect to the full range of experiences and diversity in our student body including Graduate Assistants; the FUTURE Postsecondary Program; the museum's student workers and interns; students from historically underrepresented populations and backgrounds (such as students who are Black, Indigenous, and people of color, and LGBTQ+ students); the McClung Student Advisory Board; Student Life; and the students we teach.

# Strategic Priority One: Relationship Building

*We will work to build and maintain ethical partnerships and connections with people who support the achievement of our mission.*

## Objective 1: Build Relationships with Our Primary Communities and Our Donors/ Supporters

**Action A:** Build relationships to promote intergenerational learning.

**Tactic 1:** Determine two intergenerational learning groups to focus on each fiscal year.

**Tactic 2:** Determine two community partners connected to those intergenerational learning groups to focus on each fiscal year.

**Tactic 3:** Annual evaluation of partnerships to determine their success and formalize their continuation.

**Action B:** Build new and strengthen old relationships with Native Nations.

**Tactic 1:** Determine two Native Nations to focus on each fiscal year.

**Tactic 2:** Determine two community partners connected to those Native Nations to focus on each fiscal year.

**Tactic 3:** Annual evaluation of partnerships to determine their success and formalize their continuation.

**Action C:** Build Relationships with UT Knoxville Students.

**Tactic 1:** Determine two UT Knoxville student populations to focus on each fiscal year.

**Tactic 2:** Determine two community partners connected to those student populations to focus on each fiscal year.

**Tactic 3:** Annual evaluation of partnerships to determine their success and formalize their continuation.

**Action D:** Build Relationships with our community donors and supporters based on Primary Communities.

**Tactic 1:** Determine and prioritize donors and supporters to focus on for each year of the plan.



## Objective 2: Audit the Current Organizational Documents

Action A: Create, review, and update organizational documents.

Tactic 1: Determine documents to prioritize.

Tactic 2: Update bylaws for Board of Advisors.

Tactic 3: Review bylaws for Student Advisory Board.

Action B: Assess overall internal structure including organizational hierarchy, cross-department collaboration, external collaboration within and outside of UT, structures and processes in alignment with the mission, vision, purpose, values, and primary communities.

Tactic 1: Review organizational changes needed to Board of Advisors, McClung Student Advisory Board, and other community partners.

Tactic 2: Update Governance, Staff, and Volunteer role and responsibility position descriptions in alignment with the mission, vision, purpose, values, and primary audiences.

Tactic 3: Complete annual evaluations of Governance, Staff, and Volunteers in alignment with strategic goals.

## Strategic Priority Two: Identity and Brand

*We will promote a cohesive organizational culture, purpose, and message.*

### Objective 1: Examine Our Foundations

**Action A:** Define the role of our collection in future exhibits, programs, and research.

**Tactic 1:** Audit our collections. Determine how our current and future collections are relevant to our mission.

**Tactic 2:** Audit our previous exhibitions. Determine how our current and future exhibitions are relevant to our mission.

**Tactic 3:** Create a 5-year master plan for exhibition spaces and develop a 3-year rotating exhibitions schedule.

**Tactic 4:** Create an updated Code of Ethics.

**Action B:** Foster an innovative mindset that keeps us looking for productive adaptations and opportunities.

**Tactic 1:** Each department develops a process for reflection, review, and adaptation of (at least) an annual evaluation of ideas, museum trends, and academic and cultural shifts.

**Tactic 2:** Each department tracks the progress and impact of annual evaluations through an assessment of progress.

**Tactic 3:** New findings are provided through a brown bag series, during the annual retreat, and in the annual report.

**Action C:** Further and deepen cross-departmental collaborations.

**Tactic 1:** At an annual staff retreat, determine an institutional initiative to be conceptualized and implemented throughout the next fiscal year.

**Tactic 2:** At the end of each fiscal year, develop individual performance goals that include cross-departmental collaboration to be implemented the next fiscal year.

**Tactic 3:** At the end of each fiscal year, complete individual performance appraisals that include cross-departmental collaboration.



## Objective 2: Spread Our Message

Action A: Determine initial brand identity and brand guidelines.

Tactic 1: Determine brand guidelines based on mission, vision, values, purpose, and strategic plan.

Tactic 2: Develop style guidelines.

Tactic 3: Audit and update all messaging, including digital and printed materials in accordance with guidelines.

Action B: Develop messaging framework for each of our primary communities.

Tactic 1: Determine initial messaging of brand identity (mission, vision, values, purpose, strategic plan, etc.) for each primary community.

Tactic 2: Work with representatives from each primary community to gain constructive feedback about messaging.

Tactic 3: Customize initial messaging for each primary community and develop a 2-year communications framework.

Tactic 4: Review the communications framework annually and adapt as needed.

## Strategic Priority Three: Sustainability and Growth

*We will evaluate and prioritize our resources to enhance our impacts.*

### Objective 1: Audit Museum Physical and Digital Space

**Action A:** Develop benchmarks for museum physical and digital space in alignment with mission, vision, purpose, and values.

**Action B:** Assess physical museum space.

**Tactic 1:** Identify and prioritize the long-term care and maintenance needs of the facility over FY23-FY26.

**Tactic 2:** Assess permanent and temporary exhibition spaces.

**Tactic 3:** Assess research and collections spaces.

**Tactic 4:** Assess programmatic and teaching spaces.

**Tactic 5:** Create template for future use and implement an operational plan for FY23.

**Tactic 6:** Develop and implement an operational plan for each fiscal year.

**Action C:** Audit digital museum space.

**Tactic 1:** Consult with the university's Office of Communications and Marketing and Office of Information Technology.

**Tactic 2:** Assess website.

**Tactic 3:** Assess social media.

**Tactic 4:** Assess digital presentation of collections.

**Tactic 5:** Turn assessments into report/benchmark plan/ priorities for future work.

### Objective 2: Conceptualize and Implement Plans for our Spaces

**Action A:** Conceptualize operational plans for physical museum spaces to build a case for advocacy.

**Tactic 1:** Evaluate programmatic schedules and their capacity limits.

**Tactic 2:** Evaluate report from physical assessment and conceptualize plan for space(s).

**Tactic 3:** Advocate with the university for resources to implement the plan with the assessment and other data as evidence.

**Action B:** Conceptualize operational plans for digital museum spaces based on audit.

**Tactic 1:** Evaluate report from digital assessment and conceptualize plan for space(s).

**Tactic 2:** Advocate with the university for resources to implement the plan with the assessment and other data as evidence.



## Objective 3: Develop Business Case for Museum Space

**Action A:** Work with a consultant to develop a business case for the expansion of museum space.

**Action B:** Begin an internal assessment of the physical building with the appropriate campus partners including the College of Architecture + Design.

**Action C:** Work with a consultant and community partners to develop a capital campaign plan for the expansion of museum space.

## Objective 4: Develop and Update Education and Interpretive Plans

**Action A:** Develop and update educational goals, philosophy, messages, and general activities based on research and best practices.

**Tactic 1:** Define parameters for quality, accuracy, appropriateness, and effectiveness.

**Tactic 2:** Evaluate exhibition content for accuracy, appropriateness for primary communities, high quality, and effectiveness and impact.

**Tactic 3:** Evaluate programmatic content for accuracy, appropriateness for primary communities, high quality, and effectiveness and impact.

**Tactic 4:** Determine annual priorities and conduct primary research in accordance with organizational mission, goals, and scholarly standards.

**Action B:** Ensure that the interpretive goals and messages of future exhibitions align with museum mission and are based on current research and best practices.

**Tactic 1:** Update exhibition proposal form so that interpretive goals and messages are aligned with museum mission and vision.

**Tactic 2:** Update exhibition review procedures to reflect the collaborative and adaptive values of the museum.

## Objective 5: Consistently Monitor Organizational and Financial Sustainability and Growth

**Action A:** Assess organizational needs for institutional sustainability and growth potential.

**Tactic 1:** Annually develop organizational budgets that promote long-term sustainability and realistic growth in alignment with the mission, vision, purpose, and values.

**Tactic 2:** Annually develop specific Development goals for large institution-wide initiatives.

## Objective 6: Audit Resources and Staff Expertise in Alignment with the Museum's Mission

Action A: Assess capacity of current staff.

Tactic 1: Review job descriptions to support capacity needs.

Tactic 2: Develop plan for future staff capacity needs.

Tactic 3: Determine current staff expertise in connection with current museum operations.

Tactic 4: Develop plan to complement existing expertise.

Tactic 5: Integrate both individual and collective professional development into annual staff goals for all staff through workshops, retreats, courses, and conferences.



## Strategic Priority Four: Collections and Research

*We actively, responsibly, and ethically care for the objects entrusted to the museum.*

### Objective 1: Update Museum Collections Management Policies and Procedures

Action A: Assess safety and security procedures and plans for collections in the museum's custody.

Tactic 1: Update an emergency preparedness plan.

Tactic 2: Update policies and procedures for current and future loans of the museum's collections.

Tactic 3: Update policies and procedures for use of federal collections by museum and others.

Tactic 4: Update processes that regularly monitor environmental conditions and mitigate harm.

Tactic 5: Solidify the agreement with the Tennessee Valley Authority and other Federal partners for continued care and use of collections.

Tactic 6: Promote and highlight access to our collections for research purposes, both at UT and beyond.

Action B: Identify needs and determine priorities for ethical care and storage.

Tactic 1: Complete an annual assessment of collection needs (accessions, deaccessions, conservation priorities, and risk management in alignment with mission, vision, purpose, and values).

Tactic 2: Update collections care policies and procedures for collections on exhibition in accordance with sustainable gallery rotations plans.

Tactic 3: Update collections care policies and procedures for collections in storage.

Tactic 4: Update collections care policies and procedures for collections on loan.

### Objective 2: Prioritize Repatriation Compliance and Consultation

Action A: Use the Native American Graves Protection and Repatriation Act (NAGPRA) and ethical principles in the museum field as our guides and starting point.

Action B: Ensure that policies and procedures center the needs and preferences of Native Nations regarding the proper care and current and potential future use of collections.

## **Objective 3: Provide Physical and Intellectual Access to the Collections**

Action A: Update policies and procedures for staff access to physical and digital collections, data, and information.

Action B: Update policies and procedures for physical and digital researcher access.

Action C: Update policies and procedures for physical and digital community access.



# McClung Museum Team

Timothy Baumann, Curator of Archaeology, Director of Laboratory of Environmental Archaeology

Amanda Beasley, Visitor Services Coordinator

Callie Bennett, Assistant Museum Educator

Leslie Chang Jantz, Curator of Education

Sadie Counts, Graduate Associate of Curation, Exhibitions, and Special Projects, Coordinator of Strategic Planning

Alison Damick, Associate Curator of Environmental Archaeology

Jeronimo Da Silva, Graduate Assistant of Malacology

Gerald Dinkins, Curator of Natural History and Malacology

Matthew Esselburn, Community Service Officer III (UTPD)

Claudio Gómez, Jefferson Chapman Executive Director

Kandi Hollenbach, Associate Curator of Paleoethnobotany

Katy Malone, Manager of Education and Community Engagement, Curator of Academic Programs

Alex Miller, Graduate Assistant of Academic Programs

Karen Norwood, Interim Registrar and Collections Manager, Graduate Research Assistant of Collections

Emily Reichard, Communications and Annual Giving Professional

Lori Robbins, Graduate Assistant of Archaeology

Kelly Santana, Graduate Research Assistant of Paleoethnobotany

Catherine Shteynberg, Assistant Director, Curator of Exhibitions and Arts and Culture Collections

Tiffany Vaughn, Administrative Assistant

Chris Weddig, Exhibition and Physical Experiences Manager

Karen West, Business Manager (Office of the Provost)



*Complicated Stamped Bowl*, Annie Driver, Ceramic, Bequest of Madeline Kneberg Lewis, 1996.14.181

## External Collaborators:

Toni Adams, Facilities

Trisha Curtis, Building Services

## Special Thanks to:

Dina Bailey, Consultant, Mountain Top Vision

All our community partners and collaborators.

This strategic plan was made possible by the Sustaining the Humanities through the American Rescue Plan (SHARP) and the National Endowment for the Humanities.



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Tennessee**  
Our Stories. Our State.



**Smithsonian**  
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