



NOTICE OF MEETING  
CITY OF PACIFIC GROVE  
**CITY COUNCIL**  
**ERRATA SHEET**



**CITY OF PACIFIC GROVE**  
300 Forest Avenue, Pacific Grove, California 93950

**ERRATA SHEET**

**TO:** HONORABLE MAYOR AND MEMBERS OF CITY COUNCIL  
**FROM:**  
**MEETING DATE:** 07/30/2020  
**SUBJECT:** City Council Meeting Agenda- Errata Sheet

Attached is additional information for your consideration at the July 30, 2020 Museum Board Meeting:

| Agenda Item | Information Provided/Corrected     |
|-------------|------------------------------------|
| 11A         | Audited Financials 2017-2018       |
| 11B         | Business and Fund Development Plan |
| 11C         | Exhibits Plan                      |

**Attachments**

Audited Financials  
Business and Fund Development Plan  
Exhibits Plan

**MUSEUM FOUNDATION OF  
PACIFIC GROVE, INC.  
DBA PACIFIC GROVE MUSEUM OF  
NATURAL HISTORY**

**FINANCIAL STATEMENTS  
with  
INDEPENDENT AUDITOR'S REPORT**

**JUNE 30, 2019**

**McGILLOWAY, RAY, BROWN & KAUFMAN  
ACCOUNTANTS & CONSULTANTS**

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## INDEPENDENT AUDITOR'S REPORT

To the Board of Trustees of  
Museum Foundation of Pacific Grove, Inc.  
dba Pacific Grove Museum of Natural History  
Pacific Grove, California

### **Report on the Financial Statements**

We have audited the accompanying financial statements of Museum Foundation of Pacific Grove, Inc. dba Pacific Grove Museum of Natural History (Foundation), which comprise the statement of financial position as of June 30, 2019, and the related statements of activities and change in net assets, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements.

### **Management's Responsibility for the Financial Statements**

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

### **Auditor's Responsibility**

Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit includes performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our unmodified opinion.

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Gerald C. Ray, CPA | Patricia M. Kaufman, CPA, CGMA | Jesus Montemayor, CPA | Smriti Shrestha, CPA

Sarita C. Shannon, CPA | Whitney Ernest, CPA | Devvyn MacBeth, CPA | Deanna Thomas, CPA | Sukhdev Singh, CPA |  
Laura Armbruster, CPA | Rose Maxwell, CPA

## Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the Foundation as of June 30, 2019 and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

## Emphasis of Matter

As discussed in Note 1 to the financial statements, in 2019, the Foundation adopted new accounting guidance, Accounting Standards Update No. 2016-14, Not-For-Profit Entities (Topic 958) *Presentation of Financial Statements of Not-for-Profit Entities*. Our opinion is not modified with respect to this matter.



McGilloway, Ray, Brown & Kaufman  
Salinas, California  
February 27, 2020

MUSEUM FOUNDATION OF PACIFIC GROVE, INC.  
 dba PACIFIC GROVE MUSEUM OF NATURAL HISTORY  
 STATEMENT OF FINANCIAL POSITION  
 JUNE 30, 2019

|  |                     |
|--|---------------------|
| Assets                                       |                     |
| Cash and cash equivalents                    | \$ 905,569          |
| Accounts receivable                          | 101,627             |
| Grants receivable                            | 202,913             |
| Prepaid expenses                             | 564                 |
| Inventory                                    | 6,667               |
| Fixed assets, net                            | 138,920             |
| Other assets                                 |                     |
| Long-term investments                        | 1,515,588           |
| Beneficial interest in assets held by others | 317,926             |
| Total assets                                 | <u>\$ 3,189,774</u> |
| Liabilities and net assets                   |                     |
| Liabilities                                  |                     |
| Payable                                      | \$ 19,579           |
| Accrued expenses                             | 33,903              |
| Total liabilities                            | <u>53,482</u>       |
| Net assets                                   |                     |
| Without donor restrictions                   |                     |
| Undesignated                                 | 666,040             |
| With donor restrictions                      |                     |
| Purpose and time restrictions                | 1,629,983           |
| Perpetual in nature                          | 840,269             |
| Total with donor restrictions                | <u>2,470,252</u>    |
| Total net assets                             | <u>3,136,292</u>    |
| Total liabilities and net assets             | <u>\$ 3,189,774</u> |

The accompanying notes are an integral part of these financial statements.

MUSEUM FOUNDATION OF PACIFIC GROVE, INC.  
dba PACIFIC GROVE MUSEUM OF NATURAL HISTORY  
STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS  
FOR THE YEAR ENDED JUNE 30, 2019

|  | Without<br>Donor<br>Restrictions | With Donor Restrictions      |                        | Total            |
|--|----------------------------------|------------------------------|------------------------|------------------|
|  |                                  | Purpose & Time<br>Restricted | Perpetual in<br>Nature |                  |
| <b>SUPPORT AND REVENUES</b>  |                                  |                              |                        |                  |
| Contributions  | \$ 160,342                       | \$ 758,437                   | \$ -                   | \$ 918,779       |
| State and local funding  | 270,000                          | -                            | -                      | 270,000          |
| Grants   | 141,822                          | 703,973                      | -                      | 845,795          |
| Special events revenue, net  | 28,246                           | -                            | -                      | 28,246           |
| Museum admissions  | 64,070                           | -                            | -                      | 64,070           |
| Store sales  | 44,086                           | -                            | -                      | 44,086           |
| Tuition revenue  | 66,150                           | -                            | -                      | 66,150           |
| Facility rental  | 35,084                           | -                            | -                      | 35,084           |
| Miscellaneous income   | 1,404                            | -                            | -                      | 1,404            |
| Investment income, net   | 124                              | 9,016                        | -                      | 9,140            |
| Change in value of Beneficial interest in<br>assets held by others | (4,076)                          | -                            | -                      | (4,076)          |
| Net assets released from restrictions                              | 484,874                          | (484,874)                    | -                      | -                |
| <b>Total support and revenues</b>                                  | <b>1,292,126</b>                 | <b>986,552</b>               | <b>-</b>               | <b>2,278,678</b> |
| <b>EXPENSES</b>  |                                  |                              |                        |                  |
| Program services   | 570,652                          | -                            | -                      | 570,652          |
| Supporting services  |                                  |                              |                        |                  |
| Management and general   | 477,229                          | -                            | -                      | 477,229          |
| Fundraising  | 49,368                           | -                            | -                      | 49,368           |
| <b>Total expenses</b>  | <b>1,097,249</b>                 | <b>-</b>                     | <b>-</b>               | <b>1,097,249</b> |
| Change in net assets   | 194,877                          | 986,552                      | -                      | 1,181,429        |
| Net assets, beginning of year                                      | 471,163                          | 643,431                      | 840,269                | 1,954,863        |
| Net assets, end of year  | \$ 666,040                       | \$ 1,629,983                 | \$ 840,269             | \$ 3,136,292     |

The accompanying notes are an integral part of these financial statements.

MUSEUM FOUNDATION OF PACIFIC GROVE, INC.  
 dba PACIFIC GROVE MUSEUM OF NATURAL HISTORY  
 STATEMENT OF FUNCTIONAL EXPENSES  
 FOR THE YEAR ENDED JUNE 30, 2019

|                              | Supporting Services |                              |                  |                                 | Total               |
|------------------------------|---------------------|------------------------------|------------------|---------------------------------|---------------------|
|                              | Program<br>Services | Management<br>and<br>General | Fundraising      | Supporting<br>Services<br>Total |                     |
| Expenses                     |                     |                              |                  |                                 |                     |
| Salaries and payroll related | \$ 388,267          | \$ 206,125                   | \$ 36,885        | \$ 243,010                      | \$ 631,277          |
| Exhibit                      | 13,083              | 225                          | 323              | 548                             | 13,631              |
| Professional fees            | 66,799              | 66,412                       | 121              | 66,533                          | 133,332             |
| Transportation expense       | 13,968              | 405                          | 7                | 412                             | 14,380              |
| Cost of sales                | 24,905              | -                            | -                | -                               | 24,905              |
| Advertising and marketing    | 5,133               | 3,911                        | 1,469            | 5,380                           | 10,513              |
| Office supplies              | 2,598               | 880                          | 386              | 1,266                           | 3,864               |
| Printing                     | 11,750              | 5,047                        | 5,575            | 10,622                          | 22,372              |
| Postage                      | 784                 | 328                          | 1,340            | 1,668                           | 2,452               |
| Equipment                    | 3,125               | 381                          | -                | 381                             | 3,506               |
| Repairs and maintenance      | 855                 | 2,477                        | 64               | 2,541                           | 3,396               |
| Depreciation                 | -                   | 20,062                       | -                | 20,062                          | 20,062              |
| Insurance                    | -                   | 11,615                       | -                | 11,615                          | 11,615              |
| Utilities                    | 6,497               | 3,502                        | 1,031            | 4,533                           | 11,030              |
| Computer and IT              | 4,364               | 12,408                       | -                | 12,408                          | 16,772              |
| Hospitality                  | 3,758               | 2,035                        | 1,280            | 3,315                           | 7,073               |
| Dues and subscriptions       | 945                 | 4,348                        | 475              | 4,823                           | 5,768               |
| Bank and credit card fees    | 420                 | 6,746                        | 183              | 6,929                           | 7,349               |
| Background checks            | 1,786               | -                            | -                | -                               | 1,786               |
| Other expenses               | 2,403               | 2,175                        | -                | 2,175                           | 4,578               |
| Professional development     | 740                 | 754                          | 135              | 889                             | 1,629               |
| Travel and lodging           | 1,472               | 511                          | 94               | 605                             | 2,077               |
| Grants paid to others        | 17,000              | -                            | -                | -                               | 17,000              |
| Bad debt                     | -                   | 4,275                        | -                | 4,275                           | 4,275               |
| Loss on disposal             | -                   | 122,607                      | -                | 122,607                         | 122,607             |
|                              | <u>\$ 570,652</u>   | <u>\$ 477,229</u>            | <u>\$ 49,368</u> | <u>\$ 526,597</u>               | <u>\$ 1,097,249</u> |
| Total expenses               |                     |                              |                  |                                 |                     |

The accompanying notes are an integral part of these financial statements.

MUSEUM FOUNDATION OF PACIFIC GROVE, INC.  
 dba PACIFIC GROVE MUSEUM OF NATURAL HISTORY  
 STATEMENT OF CASH FLOWS  
 FOR THE YEAR ENDED JUNE 30, 2019

|  |                   |
|--|-------------------|
| CASH FLOWS FROM OPERATING ACTIVITIES   |                   |
| Change in net assets   | \$ 1,181,429      |
| Adjustments to reconcile net income to net cash flows provided by operating activities |                   |
| Depreciation   | 20,062            |
| Loss on disposal of asset  | 122,607           |
| Change in beneficial interest in assets held by others                                 | 4,076             |
| Unrealized loss on endowment   | (3,884)           |
| Realized loss on endowment   | (9,660)           |
| Changes in operating assets and liabilities  |                   |
| Accounts receivable  | (62,962)          |
| Grants receivable  | (181,048)         |
| Prepaid expenses   | (36)              |
| Inventory  | (98)              |
| Accounts payable   | (14,938)          |
| Accrued expenses   | (18,311)          |
| Net cash provided by operating activities  | <u>1,037,237</u>  |
| CASH FLOWS FROM INVESTING ACTIVITIES   |                   |
| Purchase of fixed assets   | (35,668)          |
| Purchase of investments  | (929,597)         |
| Proceeds from sale of investments  | 372,054           |
| Net cash used by investing activities  | <u>(593,211)</u>  |
| Net increase in cash and cash equivalents  | 444,026           |
| Cash and cash equivalents, beginning of year   | <u>461,543</u>    |
| Cash and cash equivalents, end of year   | <u>\$ 905,569</u> |

The accompanying notes are an integral part of these financial statements.

MUSEUM FOUNDATION OF PACIFIC GROVE, INC.  
dba PACIFIC GROVE MUSEUM OF NATURAL HISTORY  
NOTES TO FINANCIAL STATEMENTS  
JUNE 30, 2019

**1. Summary of Significant Accounting Policies**

***Nature of Activities***

The Museum Foundation of Pacific Grove, Inc. dba Pacific Grove Museum of Natural History (the “Foundation”) was formed on October 3, 2008 as a California nonprofit public benefit corporation. The Foundation was formed to operate, manage and care for and use the collections of the Pacific Grove Museum of Natural History (Museum) owned by the City of Pacific Grove (City). The Museum is open to benefit the City, its residents, visitors, and the users of the Museum through exhibits and educational events. Revenues for the Foundation are derived mainly from the City based upon an operating agreement, and contributions.

***Basis of Accounting***

The accompanying financial statements are presented using the accrual basis of accounting.

***Financial Statement Presentation***

In August 2016, the Financial Accounting Standards Board (“FASB”) issued Accounting Standards Update (“ASU”) No. 2016-14, Not-for-Profit Entities (Topic 958): *Presentation of Financial Statements of Not-for-Profit Entities* (“ASU 2016-14”), and the provisions of the American Institute of Certified Public Accountants “Audit and Accounting Guide for Not-for-Profit Foundations.”

***Use of Estimates***

The presentation of financial statements in accordance with accounting principles generally accepted in the United States requires management to make estimates and assumptions that affect the amounts reported. Actual results could differ from those estimates.

***Cash and Cash Equivalents***

Cash and cash equivalents consist of demand deposits and highly liquid investments with original maturities of three months or less from date of purchase. Cash and cash equivalents managed by the Foundation’s investment managers as part of its long-term investment strategy are included in long-term investments.

***Concentration of Credit Risk***

Cash and cash equivalents consist of demand deposit accounts as of June 30, 2019. The Foundation invests cash at well capitalized financial institutions that are insured up to \$250,000 by the Federal Deposit Insurance Corporation (FDIC). The Foundation has not experienced any loss in such accounts. As of June 30, 2019 the uninsured balance is \$214,508. The Foundation believes it is not exposed to any significant credit risk on its cash balances.

Investments include accounts insured by Securities Investor Protection Corporation (SIPC). The SIPC insures securities and cash in the event of broker-dealer failure. The SIPC provides up to \$500,000 for protection for brokerage accounts held in each separate capacity, with a limit of \$250,000 for claims of un-invested cash balances. At times, such amounts may exceed SIPC limits. In the event of insolvency by the financial institution, deposits in excess of insured amounts are potentially subject to unrecoverable loss.

***Inventory***

Inventory consists of souvenirs sold at the Foundation’s gift shop. Inventory is valued at the lower of cost or market, (first-in, first-out method) or net realizable value.

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NOTES TO FINANCIAL STATEMENTS  
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***Accounts Receivable***

The majority of accounts receivable derive from agreements from donors to establish a permanent exhibit. Accounts receivable is stated at amounts from these donors. The Foundation records an allowance for estimated uncollectible accounts in an amount approximating anticipated losses. Individual uncollectible accounts are written off against the allowance when collection of the individual accounts appear doubtful.

***Grants Receivable***

Grants receivable consist of amounts that have been awarded to the Foundation but have not yet been paid. The majority of grants receivable derive from multi-year agreements. Grants receivable is stated at amounts due from these agreements. All balances are due within one year and are considered collectible at June 30, 2019.

***Investments***

Marketable debt and equity securities, which are listed on national securities exchanges, are stated at fair market value. Morgan Stanley investments are valued at the amounts reported to the Foundation by Morgan Stanley and the Foundations investment advisors. Increases or decreases in fair market value are recognized in the period which they occur.

***Beneficial Interest in Assets Held by Others***

The Foundation has a stewardship fund held and administered by the Community Foundation for Monterey County, (Community Foundation) with the acquisition of the Pacific Grove Natural History Museum Association on July 1, 2010. Under the terms of the agreement, the Foundation has the right to receive distributions from the fund made at the request of the Foundation's board of directors. The fair value of the beneficial interest was recognized as an asset and a contribution at the date it was acquired. The Community Foundation has full authority and discretion as to the investment and reinvestment of the assets. Gains and losses, which are not distributed, are reflected as change in value of beneficial interest in assets held at Community Foundation.

***Property and Equipment, Net***

The City owns the Museum and the related property, plant and equipment. The Foundation purchases certain tangible assets to support managing the facility. The City has reversionary rights to facility improvements and exhibitions purchased by the Foundation.

Property and equipment purchased are recorded at cost and donated property and equipment are recorded at estimated fair value on the date contributed to the Foundation. Assets donated with explicit restrictions regarding their use and contributions of cash that are restricted to property and equipment purchases are reported as with donor restriction support. Absent donor stipulations regarding how long those donated assets are to be maintained, the Foundation reports expirations of donor restrictions when the donated or acquired assets are in their specified service, at which time the with donor restriction net assets are reclassified as without donor restriction. Additions to property and equipment in excess of \$5,000 with an estimated useful life of greater than one year are capitalized. Depreciation is computed using the straight-line method over the estimated useful lives of the assets ranging from three to seven years.

***Accrued Compensated Absences***

All full-time and part-time employees accrue paid time off for vacation and sick leave. The rate of accrual is based on seniority and percentage of time worked if part-time. Any unused paid time off is paid upon termination.

MUSEUM FOUNDATION OF PACIFIC GROVE, INC.  
dba PACIFIC GROVE MUSEUM OF NATURAL HISTORY  
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JUNE 30, 2019

***Museum Collection***

The Museum Collection (Collection) is comprised of artifacts owned by the City and therefore, the Collection is not recognized as assets on the Foundation's statement of financial position. The Collection refers to all artifacts owned by the City and maintained at the Museum, as identified in the Collection survey conducted in February 2010, including those exhibited, stored and located within the City's Point Pinos Lighthouse.

In accordance with accounting policies generally followed by museums, the value of the Foundation's collection is not reflected in the consolidated statement of financial position. Purchase of collection items are recorded as decreases in net assets in the year in which the items are acquired. Proceeds from donations or insurance recoveries are reflected as increases in the appropriate net asset classes. The Collection is protected and cared for in accordance with the Museum's management policy.

***Net Assets***

Net assets, revenues, gains and losses are classified based on the existence or absence of donor or grantor-imposed restrictions. Accordingly, net assets and changes therein are reported as follows:

*Net Assets Without Donor Restrictions* – Net assets available for use in general operations and not subject to donor or grantor restrictions over which the Board of Directors have discretionary control in carrying out the operations of the Foundation.

*Net Assets With Donor Restrictions* – Net assets subject to donor or grantor imposed restrictions and for which the applicable restriction was not met as of the year end of the current reporting period. Some restrictions are temporary in nature, such as those that are met by the passage of time or other events specified by the donor. Other donor-imposed restrictions are perpetual in nature, where the donor stipulates that resources be maintained in perpetuity.

***Donated Services and Materials***

The Foundation may receive services, equipment and material without payment or compensation. When the value of such contributions is ascertainable and meets the criteria for recognition in the statement of activities, it is reflected in the accompanying financial statements as revenue and expense. Donated services are recorded if such services create or enhance nonfinancial assets or require specialized skills and are so essential that they would be purchased if not provided by donation. Materials and other noncash donations are recorded at estimated fair value determined at the date of donation. Donations of services and materials for special events aggregated \$9,502 for the year ended June 30, 2019. Donations of materials for programs and management and general aggregated \$1,929 for the year ended June 30, 2019.

Volunteers donated hours to the Foundation during the period, however, these donated services are not reflected in the financial statements since the services do not require specialized skills as specified by accounting standards for recognition.

***Financial Instruments***

Financial instruments included in the Foundation's statements of financial position include cash, beneficial interest in assets held at community foundation, accounts payable and accrued expenses. For cash, accounts payable and accrued expenses, the carrying amounts represent a reasonable estimate of the corresponding fair values. Beneficial interest in assets held by others and the long-term investments are reflected in the accompanying balance sheets at their estimated fair values using methodologies described below.

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***Revenue Recognition***

Contributions received are recognized as revenue when received or unconditionally promised. All contributions and grants are considered to be available without donor restrictions unless specifically restricted by the donor or grantor. Amounts received that are designated for future periods or restricted by the donor or grantor for specific purposes are reported as with donor restrictions.

Revenue from grants which have been classified as “exchange transactions” is recognized when earned. Membership dues, which are nonrefundable, are comprised of an exchange element based on the benefits received, and a contribution element for the difference. The exchange portion of membership dues are recognized over the membership period, and the contribution portion immediately.

***Functional Expense Allocation***

The costs of providing the various programs and other activities have been summarized on a functional basis in the statement of activities and in the statement of functional expenses. The statement of functional expenses presents the natural classification detail of expenses by function. Accordingly, certain costs have been allocated among the programs and supporting services benefited. Salary expense allocation is based on a direct distribution per employee time sheets. Management allocated indirect costs based on the ratio of total allocable indirect costs to total non-salary costs.

***Advertising Costs***

The Foundation expenses advertising costs as they are incurred. Advertising expenses were \$10,513 for the year ended June 30, 2019.

***Income Tax Status***

The Foundation is exempt from income tax under Section 501(c)(3) of the Internal Revenue Code and Section 23701d of the California Revenue and Taxation Code but is subject to taxes on unrelated business income when earned.

The Foundation has adopted the provisions related to accounting for uncertainty in income taxes, which defines a recognition threshold and measurement attribute for the financial statement recognition and measurement of a tax position taken or expected to be taken in a tax return. The Foundation's management has considered its tax positions and believes that all of the positions taken by the Foundation in its federal and state tax returns are more likely than not to be sustained upon examination. The Foundation's returns are subject to examination by federal and state taxing authorities, generally for three years and four years, respectfully, after they are filed.

***Recently Adopted Accounting Pronouncement***

**ASU 2016-14**

In August 2016, the Financial Accounting Standards Board (FASB) issued ASU No. 2016-14, Not-For-Profit Entities (Topic 958) Presentation of Financial Statements of Not-For-Profit Entities. The amendment applies to all not-for-profit entities, and reduces the classes of net assets to net assets with donor restrictions and net assets without donor restrictions; removes the reconciliation of cash flows to the indirect method if using the direct method; requires the reporting of investment returns, net of expenses, with no disclosure of netted expenses required; requires the use, in the absence of explicit donor stipulations, of the placed-in-service approach for reporting expirations or restrictions on cash or other asset donations; and requires disclosure of expenses by both their natural and functional classification on the face of the statement of activities, as a separate statement, or in the notes to the financial statements. In addition, the

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amendment provides enhanced disclosures on amounts and purposes of board designations and appropriations, composition of net assets with donor restrictions, discussion of liquidity for the year following year-end, discussion of liquidity of financial assets at year-end, methodology used to allocate costs between program and support functions, and underwater endowment funds.

The adoption of the new accounting standard improves the net asset classification requirements and the information in the financial statements and notes about the Trust's liquidity, financial performance, and cash flows presented to provide more useful information to donors, grantors, creditors, and other users of these financial statements. The Trust has adopted the requirements of ASU No. 2016-14 and has adjusted the presentation in these financial statements accordingly. The temporarily restricted and permanently restricted net asset classes have been combined into a single net asset class called net assets with donor restrictions. The unrestricted net assets class has been renamed net assets without donor restrictions. The ASU has been applied retrospectively to all periods presented. The implementation has no impact on previously reported net assets.

***Upcoming Accounting Pronouncements***

**ASU 2014-09**

In May 2014, the FASB issued ASU No. 2014-09, Revenue from Contracts with Customers, which amended revenue recognition guidance to clarify the principles for recognizing revenues from contracts with customers. The guidance requires an entity to recognize revenue when it transfers promised goods or services to customers in an amount that reflects the consideration to which the entity expects to be entitled in exchange for those goods or services. The guidance also requires expanded disclosures relating to the nature, amount, timing, and uncertainty of revenue and cash flows arising from contracts with customers. Additionally, disclosures are required about customer contracts, significant judgement and changes in judgements, and assets recognized from the costs to obtain or fulfill a contract. ASU No. 2014-09 is effective for annual reporting in fiscal years beginning after December 15, 2018. The Foundation currently expects the impact to be de minimis given the immaterial nature of its revenue sources outside of fees for services.

**ASU 2018-08**

In June 2018, the FASB issued ASU No. 2018-08, Not-For-Profit Entities (Topic 958) Clarifying the Scope and the Accounting Guidance for Contributions Received and Contributions Made. The amendments in this Update provide a more robust framework to determine when a transaction should be accounted for as a contribution under Subtopic 958- 605 or as an exchange transaction accounted for under other guidance (for example, Topic 606). The amendments also provide additional guidance about how to determine whether a contribution is conditional. The amendments provide for additional clarifying guidance resulting in greater consistency in application and make the accounting for contributions more operable. The guidance is effective for periods beginning after December 15, 2018. The amendments in this Update should be applied on a modified prospective basis. Retrospective application is permitted. The Foundation is currently evaluating the impact of the pending adoption of this new standard on its financial statements and expects the impact to be de minimis.

**ASU 2016-02**

In February 2016, the FASB issued ASU No. 2016-02, which amends the FASB Accounting Standards Codification and creates Topic 842, Leases, requiring Foundations to recognize lease assets and lease liabilities on the statement of net position and requiring disclosure of key information about leasing arrangements. The guidance is effective for periods beginning after

MUSEUM FOUNDATION OF PACIFIC GROVE, INC.  
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December 15, 2020. ASU No. 2016-02 mandates a modified retrospective transition method. The Foundation is currently evaluating the impact of the pending adoption of this new standard on its financial statements and expects the impact to be de minimis.

***Subsequent Events***

The Foundation has performed an evaluation of subsequent events through February 27, 2020, which is the date the financial statements were available to be issued and has considered any relevant matters in the preparation of the financial statements and footnotes. This review and evaluation revealed no new material event or transaction which would require an additional adjustment to or disclose in the accompanying financial statements.

**2. Financial Assets Availability, Liquidity and Reserves Management**

The following reflects the Foundation's financial assets as of June 30, 2019, reduced by amounts not available for general expenditure due to contractual or donor-imposed restrictions within one year.

The following assets available to meet cash needs for general expenditure within one year:

|  |             |
|--|-------------|
| Cash and cash equivalents  | \$ 905,569  |
| Accounts receivable  | 101,627     |
| Grants receivable  | 202,913     |
| Long-term investments  | 1,515,588   |
| Beneficial interest in assets held by others   | 317,926     |
| Financial assets as of June 30, 2019   | 3,043,623   |
| Less those unavailable for general expenditures within one year, due to:               |             |
| Contractual or donor-imposed restrictions:   |             |
| Restricted by donor with purpose and time restrictions                                 | (1,629,983) |
| Restricted in perpetuity   | (840,269)   |
| Financial assets available to meet cash needs for general expenditures within one year | \$ 573,371  |

As part of the Foundation's liquidity management, it has a policy to structure its financial assets to be available as its general expenditures, liabilities, and other obligations come due. To help manage unanticipated liquidity needs, the Foundation has a reserve of approximately equal to 3 months of operating expenses, which is \$235,077 as of June 30, 2019. Subsequent to year end, the Board of Directors is in the process of formalizing a liquidity reserve to meet the requirements of ASU No. 2016-14, Not-For-Profit Entities (Topic 958) *Presentation of Financial Statements of Not-For-Profit Entities*.

**3. Fair Value Measurements**

The Foundation measures its assets and liabilities at fair value in accordance with the Fair Value Measurements and Disclosures Topic of the FASB Accounting Standards Codification (ASC) 820. This guidance defines fair value as the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants at the measurement date and establishes a framework for measuring fair value.

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The guidance establishes a three-level hierarchy for fair value measurements based upon the transparency of inputs to the valuation of an asset or liability as of the measurement date. The guidance expands disclosures about instruments measured at fair value. The guidance applies to other accounting pronouncements that require or permit fair value measurements and, accordingly, the guidance does not require any new fair value measurements.

The guidance establishes a three-level valuation hierarchy for disclosure of fair value measurements. The three levels are defined as follows.

*Level 1* - Valuation is based on observable inputs using quoted prices in active markets for identical assets or liabilities that are accessible at the measurement date.

*Level 2* - Valuation is based on inputs from sources other than quoted prices in active markets that are either directly or indirectly observable as of the reporting date. This may include quoted prices for similar assets in an active market, quoted prices for similar assets in a market that is not active or valuation methods using models, interest rates and yield curves as observable inputs.

*Level 3* - Valuation is based on unobservable inputs for the assets, reflecting the Foundation's consideration about the assumptions that a market participant would use in pricing the asset or liability, to the extent that observable inputs (Levels 1 and 2) are not available. Level 3 assets and liabilities include situations where there is little or no market activity for the assets or liabilities, and significant management judgment or estimates are required.

The Foundation received a bequest to establish an endowment in perpetuity in fiscal year 2015. The Foundation established an investment account with a financial advisor. The amount classified as Level 1 represented cash on deposit. The Level 3 investment represents shares received to close out the bequest in InvenTrust Properties Corporation. These shares are valued by the corporation and are not currently traded on a national securities exchange.

While the Foundation believes its valuation methods are appropriate and consistent with those used by other market participants, the use of different methodologies or assumptions to determine the fair value of certain financial instruments could result in a different estimate of fair value at reporting date. Those estimated values may differ significantly from the values that would have been used had a readily available market for such assets and liabilities existed, or had such assets and liabilities been liquidated, and these differences could be material to the financial statements.

The following table presents the fair value of investments on the accompanying statement of financial position by fair value hierarchy as of June 30, 2019:

|  | <u>Level 1</u>     | <u>Level 2</u> | <u>Level 3</u>    | <u>Total</u>       |
|--|--------------------|----------------|-------------------|--------------------|
| Morgan Stanley (MS)                          |                    |                |                   |                    |
| Money Market                                 | \$ 120,330         | \$ -           | \$ -              | \$ 120,330         |
| Equities                                     | 1,348,158          | -              | -                 | 1,348,158          |
| Beneficial interest in assets held by others | -                  | -              | 317,926           | 317,926            |
| InvenTrust Properties - REIT                 | -                  | -              | 47,100            | 47,100             |
|  | <u>\$1,468,488</u> | <u>\$ -</u>    | <u>\$ 365,026</u> | <u>\$1,833,514</u> |

The table below presents information about recurring fair value measurements that use significant unobservable inputs (Level 3 measurements) as of June 30, 2019:

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***InvenTrust Properties - REIT***

The Corporation engaged Duff & Phelps, LLC (“Duff & Phelps”), an independent third-party real estate advisory firm, to estimate the per share value of the Corporation’s common stock on a fully diluted basis as of May 1, 2019. Duff & Phelps has extensive experience estimating the fair values of commercial real estate. The report furnished to the Corporation by Duff & Phelps complies with the reporting requirements set forth under Standard Rule 2-2(b) of the Uniform Standards of Professional Appraisal Practice and is certified by a member of the Appraisal Institute with the MAI designation. The Duff & Phelps report, dated May 1, 2019, reflects values as of May 1, 2019.

InvenTrust Properties - REIT

|                            |           |
|----------------------------|-----------|
| Balance, beginning of year | \$ 47,100 |
| Unrealized gain (loss)     | -         |
|                            | -         |
| Balance, end of year       | \$ 47,100 |

The Corporation anticipates publishing a new estimated share value within one year from May 1, 2019, the date of the last published estimated share value.

***Beneficial Interest in Assets Held by Others***

Funds are invested in the Stewardship Funds, which are valued based on the market value of the underlying assets, consisting mainly of equity, fixed income and liquid alternative securities, including U.S. Treasury securities, mutual funds, corporate bonds, asset backed securities and commodities. These assets are valued based on quoted market prices. Funds invested at Community Foundation are level 3 investments since the fund agreements provide for the transfer of variance power to the Community Foundation.

The preceding method described may produce a fair value calculation that may not be indicative of net realizable value or reflective of future fair values. Furthermore, although the Foundation believed its valuation method is appropriate and consistent with other market participants, the use of different methodologies or assumptions to determine the fair value of certain financial instruments could result in a different fair value measurement at the reporting date.

The Foundation has established a stewardship fund with the Community Foundation for the benefit of the Museum. The Foundation granted variance power to the Community Foundation; thus, the Community Foundation has full authority and discretion as to the investment and reinvestment of the assets.

The following table presents the fair value of beneficial interest in assets held at Community Foundation on the accompanying statement of financial position, as of June 30, 2019:

|  |            |
|--|------------|
| Beginning balance                          | \$ 322,002 |
| Investment income (dividends and interest) | 10,996     |
| Unrealized gain                            | 2,717      |
| Realized loss                              | (562)      |
| Distributions                              | (13,545)   |
| Investment fees                            | (3,682)    |
|  | \$ 317,926 |

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**4. Endowment Fund**

The Foundation's endowment includes a donor-restricted endowment fund to support the Monarch education program and to support the creation, operation and maintenance of the Butterfly Pavilion. The total of these with donor restriction in perpetuity contributions at June 30, 2019 was \$840,269.

***Interpretation of Relevant Law***

The Board of Directors of the Foundation has interpreted the Uniform Prudent Management of Institutional Funds Act (UPMIFA) as requiring the preservation of the fair value of the original gift as of the date of gift of donor-restricted endowment funds absent explicit donor stipulations to the contrary. As a result of this interpretation, the Foundation classifies as with donor restriction in perpetuity (a) the original value of gifts donated to the endowment, (b) the original value of subsequent gifts to the endowment, and (c) accumulations to the endowment made in accordance with the direction of the applicable donor gift instrument at the time the accumulation is added to the fund. The remaining portion of the donor-restricted endowment fund that is not classified as with donor restriction in perpetuity is classified as with donor restriction net assets until those amounts are appropriated for expenditure by the Education Fund in a manner consistent with the standard of prudence prescribed by UPMIFA.

In accordance with UPMIFA, the Foundation considers the following factors in making a determination to appropriate or accumulate donor-restricted endowment funds:

- (1) The duration and preservation of the fund
- (2) The purposes of the Foundation and the donor-restricted endowment fund
- (3) General economic conditions
- (4) The possible effect of inflation and deflation
- (5) The expected total return from income and the appreciation of investments
- (6) Other resources of the Foundation
- (7) The investment policies of the Foundation

***Underwater Endowments***

From time to time, the fair value of assets associated with donor-restricted endowment funds may fall below the amount required to be maintained by donors or by law (underwater endowments). The Board of Directors of the Foundation has interpreted UPMIFA to permit spending from underwater endowments in accordance with prudent measures required under law. There were no deficiencies of this nature that would be required to be reported in without donor restriction net assets as of June 30, 2019.

***Return Objectives and Risk Parameters***

The Foundation has adopted investment and spending policies for endowment assets with the objective of ultimately providing a predictable stream of funding to programs supported by its endowment while seeking to maintain the purchasing power of the endowment assets. Endowment assets include those assets of donor-restricted funds that the Foundation must hold in perpetuity. Under this policy, as approved by the Board of Directors, the endowment assets are invested in a manner that, at a minimum, maintains the purchasing power of the original Endowment corpus and shall be consistent with: i) the risk deemed appropriate by the Investment Committee; ii) the mission and programs of the Foundation, and iii) the projected cash needs of the Foundation which may require a constant and reliable flow of income to the annual operating budget.

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***Strategies Employed for Achieving Objectives***

To satisfy its long-term rate-of-return objectives, the Foundation relies on a total return strategy in which investment returns are achieved through both capital appreciation (realized and unrealized) and current yield (interest and dividends). The Foundation targets a diversified asset allocation that places a greater emphasis on equity-based investments to achieve its long-term return objectives within prudent risk constraints.

***Spending Policy and How the Investment Objectives Relate to Spending Policy***

The Board of Directors, based on the recommendation of the Finance Committee, approve the spending rate each year. In the fiscal year 2019, the target spending rate was 4%. The Board's investment policy dictates that the spending rate is calculated based on a trailing 12-quarter moving average. Over the long term, the Foundation expects the current spending policy to allow its endowment to maintain the purchasing power of the endowment assets held in perpetuity or for a specified term as well as to provide additional real growth through new gifts and investment return.

Endowment net assets composition by type of fund as of June 30, 2019:

|   | <u>Without<br/>Donor<br/>Restrictions</u> | <u>With<br/>Donor<br/>Restrictions</u> | <u>Total</u>        |
|---|---|--|---------------------|
| Donor-restricted endowment funds  |   |  |                     |
| Original donor-restricted gift amount and amounts required to be maintained in perpetuity | \$ -                                      | \$ 840,269                             | \$ 840,269          |
| Purpose restricted funds and accumulated investment gains                                 | <u>562,071</u>                            | <u>113,248</u>                         | <u>675,319</u>      |
|   | <u>\$ 562,071</u>                         | <u>\$ 953,517</u>                      | <u>\$ 1,515,588</u> |

Changes in donor-restricted endowment net assets for the fiscal year ended June 30, 2019, consisted of the following:

|   | <u>Without<br/>Donor<br/>Restrictions</u> | <u>With<br/>Donor<br/>Restrictions</u> | <u>Total</u>        |
|---|---|--|---------------------|
| Endowment net assets, beginning of year           | \$ -                                      | \$ 944,501                             | \$ 944,501          |
| Contribution                                      | 562,071                                   | -                                      | 562,071             |
| Investment return                                 |   |  |                     |
| Interest and dividends                            | -   | 24,026                                 | 24,026              |
| Net appreciation (realized and unrealized)        | -   | (5,776)                                | (5,776)             |
| Appropriation of endowment assets for expenditure | -   | (9,234)                                | (9,234)             |
| Endowment net assets, end of year                 | <u>\$ 562,071</u>                         | <u>\$ 953,517</u>                      | <u>\$ 1,515,588</u> |

Investment expenses totaled \$9,234 for the year ended June 30, 2019.

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**5. Funds Held at Community Foundation**

The Community Foundation holds an endowment fund in which the Foundation has been designated as the income beneficiary. The Foundation does not have variance power over this fund and thus the assets in the fund are not included in the Foundation's financial statements. The balance in this account was \$130,628 as of June 30, 2019. The income distribution from the fund to the Foundation amounted to \$5,795 for the year ended June 30, 2019 and is reported in contributions in the accompanying statements of activities and changes in net assets.

**6. Property and Equipment**

Property and equipment consist of the following as of June 30, 2019:

|                          |            |
|--------------------------|------------|
| Permanent exhibits       | \$ 179,494 |
| Capital improvements     | 72,531     |
| Furniture and equipment  | 25,062     |
| Vehicles                 | 19,399     |
| Website                  | 4,250      |
|                          | 300,736    |
| Accumulated depreciation | (161,816)  |
|                          | \$ 138,920 |

Depreciation expense was \$20,062 for the year ended June 30, 2019.

**7. Accrued Expenses**

Accrued expenses consist of the following as of June 30, 2019:

|                              |           |
|------------------------------|-----------|
| Accrued sales tax            | \$ 1,105  |
| Accrued wages                | 423       |
| Accrued compensated absences | 32,375    |
|                              | \$ 33,903 |

**8. Operating Agreement and Lease**

An operating agreement and lease (Agreement) was signed by the Foundation and the City and accepted by the City Council on June 29, 2009. The Agreement was amended on July 29, 2010 and then again on August 8, 2010. It is further amended effective May 21, 2014. The Agreement states that responsibility for management of the Museum was transferred to the Foundation on August 1, 2009 for a term of thirty years and eleven months ending June 30, 2040. Commencing on June 30, 2010 and continuing on June 30th of each year of the term thereafter, the term shall be extended by one year; provided that either party may, in its sole discretion, give written notice to the other party, not later than thirty days prior to June 30th of any term year that it wishes to terminate the automatic one year extension provided for above, in which case the term of this Agreement shall be fixed at thirty years from the end of the term year in which such notice is given. Under the Agreement, the City retains ownership of the Museum facility and the Collection. The City also retains responsibility for major repairs and maintenance of the facility and for basic maintenance and janitorial services. In addition, the City has agreed to make an annual contribution to be an amount equal to one and one one-hundredths percent (1.01%) of the City's total fiscal year General Fund budget. The contribution to the Foundation will assist with

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Museum's operating costs which is included as state and local funding on the statement of activities and changes in net assets. The Foundation will be responsible for all Museum operations including managing the Collection, developing new Museum exhibits, both permanent and special, planning and conducting educational and scientific programs and special events.

**9. Net Assets With Donor Restrictions**

Net assets with donor restrictions consist of the following as of June 30, 2019:

|  |              |
|--|--------------|
| Restricted for future periods after June 30, 2019  | \$ 200,000   |
| Permanent exhibitions  |              |
| Capital Campaign   | 154,453      |
| Capital Projects   | 800,000      |
| Bird Gallery   | 129,951      |
| Changes of Monterey Bay  | 50,000       |
| Children's exhibit   | 4,741        |
| First inhabitants  | 82           |
| Education  |              |
| LiMPETS  | 86,236       |
| Leg up with science  | 4,464        |
| Program  |              |
| Adopt A Bird   | 31,559       |
| BLOY   | 10,792       |
| Ecology  | 44,457       |
| Total  | 1,516,735    |
| Endowment  |              |
| Subject to spending policy and appropriation:  |              |
| Investment in perpetuity (including the original donor-restricted gift)<br>which, once appropriated, is expendable to support the Helen Johnson<br>Monarch education program | 840,269      |
| Subject to appropriation and expenditure when a specified event occurs:  |              |
| Income earned on perpetual endowments and purpose restricted endowment<br>gifts by donors for the Helen Johnson Monarch education program                                    | 113,248      |
| Total net assets with donor restrictions   | \$ 2,470,252 |

**10. Economic Dependency**

Approximately \$270,000 or 12% of the Foundation's total support and revenues were provided by the City for the year ended June 30, 2019.

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**11. Special Events, Net**

The Foundation had net income from special events consisting of the following as of June 30, 2019:

|                       | Butterfly<br>Ball | Night Owl       | Various<br>Small Events | Total            |
|-----------------------|-------------------|-----------------|-------------------------|------------------|
| Event Revenue         | \$ 20,973         | \$ 10,732       | \$ 579                  | \$ 32,284        |
| In-Kind Contributions | 9,502             | -               | -                       | 9,502            |
| Total Revenue         | <u>30,475</u>     | <u>10,732</u>   | <u>579</u>              | <u>41,786</u>    |
| Expense               | 6,833             | 4,538           | 2,169                   | 13,540           |
| Net                   | <u>\$ 23,642</u>  | <u>\$ 6,194</u> | <u>\$ (1,590)</u>       | <u>\$ 28,246</u> |

PACIFIC GROVE  
MUSEUM  
*of* **NATURAL**  
**HISTORY**

**Pacific Grove Museum of Natural History  
Fiscal Year 2020-2021 Business Plan**

**June 2020**

## **I. GENERAL INFORMATION**

### **A. Museum History**

The Pacific Grove Museum of Natural History opened in 1883 to house collections of nature's wonders and to make them available for study for the Chautauqua Literary and Scientific Society. In 1900, the Chautauqua Museum disbanded to form a more permanent organization as the Pacific Grove Museum Association. The Association maintained the Museum until 1917 when it was transferred to the City of Pacific Grove.

On August 1, 2009, the City entered into a public/private partnership under an Operating Agreement and Lease with the Museum Foundation of Pacific Grove, Inc., a California Public Benefit corporation. Under the Agreement, the Foundation, doing business as the Pacific Grove Museum of Natural History, operates the Museum, cares for and uses the Museum collection, manages the education and interpretation at the Museum and Monarch Grove Sanctuary, and raises funds to support these activities. The City owns the Museum land and building and the Museum Collection and manages major repairs to the Museum facility.

The Museum has been accredited by the American Alliance of Museums (AAM) since 1972, the first such institution in Monterey County and one of the first in the country to receive AAM accreditation.

### **B. Museum Mission:**

*To inspire discovery, wonder, and stewardship of our natural world*

#### **The Museum does this by:**

- Emphasizing the unique and diverse natural and cultural history of the California Central Coast, while maintaining a global perspective
- Preserving the heritage of Pacific Grove and the Museum
- Managing collections for research, education, and as a continuous record of the changing world for future generations
- Serving as a resource center for the regional scientific and educational communities
- Providing leadership in natural history, conservation, and environmental education through exhibits and educational programs, striving to make this outreach relevant to all the people of the California Central Coast
- Fostering cooperative efforts in natural history research and education throughout our region

### **C. Museum Vision**

We envision a diverse community of curious minds, engaged in discovering the natural heritage and

cultural legacy that exist today on California’s Central Coast. The Museum is a catalyst for conservation and a valued learning resource in this region, facilitating active inquiry for all ages.

#### **D. Executive Summary**

The Museum’s updated strategic plan has been approved by the Foundation’s Board of Directors, and year one began in the 2019-2020 fiscal year. In August 2019, the Museum opened the newly remodeled Bird Gallery complete with new interpretation, new interactives, and new audio visual equipment. Donors to the Museum’s capital campaign made this renovation possible.

In March 2020, the Museum closed unexpectedly due to the COVID-19 pandemic. Despite the closing in the midst of a global pandemic, the Pacific Grove Museum of Natural History never wavered in its mission to “inspire discovery, wonder and stewardship of our natural world.”

During unprecedented days spent sheltering in place, the museum launched an innovative, digital solution called Museum to You, to help entertain, educate and enlighten the community—all offered at no cost.

#### **E. Community Support**

The Museum serves a diverse audience of local Monterey County residents and tourists to the California Central Coast.

The following lists the strong community support for the Museum:

- **Expertise:**

- Volunteers (Including Museum docents, Museum store attendants, Monarch Sanctuary docents, Museum gardeners, CSUMB student interns, the Museum Foundation Board of Directors, and the City’s Museum Board)
- Partner organizations: Monterey Bay National Marine Sanctuary, Department of Education, University of California Cooperative Extension, Center for Community Advocacy, CSUMB, Monterey Audubon Society, Monterey Bay Chapter of the Native Plant Society, Monterey Bay Aquarium, Carmel Valley Gem and Mineral Society, and Sustainable PG.
- Scientist Friends of the Museum

- **Public Input:**

- Public participation in Museum Foundation Board of Director committees
- Public input into the City’s Museum Board
- Class Field Trip and education program evaluation forms
- Exhibition evaluation forms
- Museum surveys
- Volunteers
- Direct communication with Museum staff and Museum Foundation Board of Directors

- **Partners:**

It is an honor to work in partnership with the following organizations:

- **City of Pacific Grove**

The Museum is in a strategic public/private partnership with the City of Pacific Grove enabling the Pacific Grove Museum of Natural History to forward the Museum’s mission

for the benefit of this generation and generations to come.

- **Monterey Bay National Marine Sanctuary**  
The Museum is part of the **LiMPETS Network** and serves as the LiMPETS Coordinator for the entire Monterey Bay region.
- **University of California Cooperative Extension**  
The Museum is the selected partner to provide the California Naturalist Program for Monterey County.
- **Science Illustration Program, CSUMB Extension**  
The Museum partners with the Science Illustration program at CSUMB Extended Education showcasing student work in the annual Illustrating Nature exhibit.
- **CSUMB Service Learning Institute**  
CSUMB service learners contribute significantly to Museum operations and special projects.
- **Monterey Audubon Society**  
A chapter of the National Audubon Society since 1943, the Monterey Audubon Society assists the Museum with subject matter expertise supporting exhibits, programs, and supporting public questions regarding birds. Their monthly member meetings are held at the Museum the second Tuesday of each month.
- **Monterey Bay Chapter of the California Native Plant Society**  
This local chapter partners with the Museum to present the Annual Wildflower Show. Their monthly member meetings are held at the Museum the second Thursday every other month.
- **Carmel Valley Gem and Mineral Society**  
The Museum partners with the Society to provide the annual Fossils Science Saturday. Their monthly member meetings are held at the Museum the second Friday of each month.
- **Sustainable PG**  
Holds monthly member meetings at the Museum the second Thursday of each month.
- **Monterey Peninsula Regional Park District**  
The Museum enjoys a long term synergetic relationship with MPRPD including providing excellent education on several of their properties. They have aided this through bus scholarships over the past 4 years.
- **California State Parks**  
The Museum partners with CA State Parks for use of their properties for the Community Science education programs, LiMPETS and Watershed Guardians.
- **Big Sur Land Trust/City of Gonzales**  
Both partners provide access to spaces for delivery of our Watershed Guardians program.
- **Gonzales Unified School District**  
Operating under a three year agreement, the Museum provides 50% of district students with field trips to the Museum.
- **Monterey County Office of Education**  
The Museum works with the County's STEM teachers through this partnership
- **Monterey County Parks Department**  
This partnership allows the Museum to use San Lorenzo Park in King City for our Watershed Guardians program.

- **Financial:**
  - City of Pacific Grove
  - Direct community support through private donations
  - Museum Foundation Board of Director donations
  - Museum members
  - Foundations
  - Public agencies

## **II. GOALS AND OBJECTIVES**

The following tables present the Museum's goals as identified by the agreement with the City, and the associated 2020-2021 key objectives aligned with them.

- 1.0** Fulfill its obligation to the public trust and be accountable to the community it serves
  - 1.1** Fulfill all contractual obligations in the agreement
  - 1.2** Continue to ensure Code of Ethics is signed by all relevant parties
  - 1.3** Continue compliance with AAM accreditation guidelines
  - 1.4** Continue audience research and museum evaluation efforts
  - 1.5** Partner with the City, community organizations, and community businesses to promote tourism to the Monterey County area
  - 1.6** Continue compliance with all local, State, and Federal laws, codes, and regulations applicable to its facilities, operations, and administration
  - 1.7** The Foundation Board of Directors will continue to grow its membership and continue its professional board development
- 2.0** Perform institutional planning and assessment processes and align its operations to this plan
  - 2.1** Implement year two of the newly adopted strategic plan and regularly assess its efficacy
  - 2.2** Ensure that all Museum policies and procedures are reviewed by the appropriate committees to ensure that they are mission driven and current with professional standards
  - 2.3** Continue managerial processes and policies to ensure that the Museum operations are integrated and focused on meeting its mission
  - 2.4** Increase efforts to collect audience data and use results to influence decision making processes
- 3.0** Have leadership, governance, and staffing structures that support the mission
  - 3.1** Complete business planning process to effectively advance mission and strategic goals
  - 3.2** Review business continuity plan detailing how to keep staff actively working during times of crises
  - 3.3** Review and assure clear job descriptions, qualifications, roles and responsibilities for staff, and volunteers, reflected in organizational charts and charters

- 3.4 Recruit additional Foundation Board of Directors to fulfill skill set and diversity goals
- 3.5 Recruit and maintain a volunteer workforce to a ratio of ten volunteers per staff member (not including committee and board volunteers)
- 3.6 Hire to fulfill Museum staffing plan
  
- 4.0 Be a responsible steward of the collections entrusted to its care and of the Museum's historic heritage
  - 4.1 Continue program to perform an annual inventory on rotating sections of the Collection
  - 4.2 Update the Education catalog as necessary and ensure that the entire Education card catalog is in the online collection database
  - 4.3 Conserve life-mounted bird specimens as funding allows
  - 4.4 Comply with all Museum policies and procedures related to the Museum's Collection
  - 4.5 Optimize basement space and improve collection storage as funding allows
  - 4.6 Continue developing new exhibits
  - 4.7 Deaccession artifacts as appropriate from the City's collection
  - 4.8 Accession artifacts that will improve the quality of the City's collection
  
- 5.0 Have interpretive and educational programs and activities that support its mission and support its public service role
  - 5.1 Implement the Museum's 2020-2021 Exhibition and Programs Plan
  - 5.2 Create Museum Exhibition and Programs Plan for 2021-2022
  - 5.3 Continue to implement mission driven education programs, refining programs and ensuring that they are serving a diverse audience
  - 5.4 Continue to evaluate educational programming to ensure scientific rigor, financial sustainability, and fulfillment of the Museum's mission and vision
  
- 6.0 Be financially stable in advancing its mission
  - 6.1 Increase organization's ability to raise revenue through grants, fundraising, and earned revenue opportunities
  - 6.2 Strengthen donor relationships with the Museum
  - 6.3 Museum's Finance Committee to provide budgetary oversight
  - 6.4 Continue maintaining a healthy operating reserve
  - 6.5 Complete 5 year financial forecast
  
- 7.0 Follow facility and risk management plans that meet programmatic and administrative needs, protect collections and support its public service role
  - 7.1 Work with Pacific Grove Public Works Department to develop an overall City Facility Management Plan for the Museum facility
  - 7.2 Update Disaster Response Plan and train staff on use

The Museum furthers its mission best and provides a visitor experience that is different from other local attractions by showcasing local natural history focus areas that are: (1) aligned to strengths in the Museum collection (2) represent natural resources that are in strong need of stewardship (3) globally relevant and (4) not freely available at other public education attractions in the area.

In 2012, the Museum earned reaccreditation with the American Alliance of Museums (AAM.) This represents the Museum having been AAM accredited for 40 continuous years. Having a strong foundation, the Museum is now focusing improving a guests' experience in the Museum and on sharing the Museum's collections with larger audiences.

In early 2016, the Board, staff, and key stakeholders began a process to determine how to transform the Museum into a resource utilized in a variety of ways by an engaged and diverse community. This effort resulted in a five year strategic plan, which has recently been updated. Year one of the newly revised strategic plan began in the 2019-2020 fiscal year and included the first gallery renovation of several planned.

### **III. KEY INITIATIVES**

The following are the three key initiatives for FY 2020-2021:

**1. Enhance Fund Development and Museum Membership:**

The Foundation Board of Directors and Museum staff will continue to cultivate the financial support of our passionate and committed donors, members, and partners with the goal of increasing support for exhibit upgrades and long-term financial sustainability.

Events such as our Night Owl evening have traditionally provided fun, community-focused ways to raise funds. At this writing, it is unknown when fundraising events might return to the Museum. Earned revenue avenues such as birthday parties and facility rentals have provided fun, educational events for families while also adding additional revenue to the Museum's income stream. Due to the COVID-19 pandemic, it is unknown when the Museum will offer these again, thus it will be doubly important to rely on individual and corporate/foundation giving.

**2. Increase Community Engagement among Diverse Audiences**

As identified in the strategic planning process, the Foundation Board of Directors and museum staff will focus on increasing ways to build community among diverse audiences. We will continue to update all interpretive materials/signage to include both Spanish and English. We are also committed to ensuring that the Museum is a safe space for respectful discourse. When we are able, we will host events focused on community involvement, and throughout this time of pandemic, will continue to leverage technology for this purpose.

**3. Improve the Guest Experience**

In 2020-2021, the Museum will continue to focus on improving the guest experience by improving the physical spaces. A new exhibit for children ages 0-5 was scheduled to open in spring of 2020, but has been delayed due to the pandemic. A new exhibition entitled, *Changes of Monterey County* will open in November 2020 and will focus on anthropogenic changes throughout Monterey County. Finally, an exhibition focused on the Museum's collection entitled, *The Power of Collections* will open in spring 2021.

#### **IV. ORGANIZATIONAL STRUCTURE**

##### **A. Organizational Responsibilities**

Under the agreement, the City retains ownership of the Museum collection and the Museum facility. The Foundation has the exclusive right to occupancy and operation of the Museum and maintains the Museum collection.

##### **B. Museum Foundation Board of Directors**

The Pacific Grove Museum of Natural History is a California public benefit charitable corporation that supports, maintains, advances, and enhances the Pacific Grove Museum of Natural History as an educational and scientific institution for the benefit of the general public.

The Museum Foundation's Board of Directors includes community leaders committed to science, education and environmental advocacy. Most importantly, all of the Foundation Board members are deeply committed to the Museum.

##### **The Museum Foundation Board of Directors (as of July 1, 2020)**

Tama Olver, President  
Julie Veitch, Vice President  
Jim Covell, Treasurer  
Erin Myers Madeira, Secretary  
Eric Barajas, Director  
Joan Clay, Director  
Matthew Denecour, Director

##### **C. Museum Committees**

The following Museum committees are each chaired by a Director from the Museum's Board of Directors:

- Executive Committee
- Finance and Investment Committee
- Board Development
- Standards and Practices Committee
- Science Advisory Committee

##### **D. Staffing**

The following table describes the staffing requirements for the period July 1, 2020 through June 30, 2021. Any discussion of staffing would be incomplete without highlighting the committed volunteers necessary to operate the Museum.

| Title  | Description  |
|--|--|
| <b>Executive Director</b><br><i>(1 FTE)</i>                      | Direct Museum operations and strategic planning. Execute Museum’s business plan. Media spokesperson/organizational voice, core values, vision, organizational culture. Outbound marketing (messaging, collateral, website, promotions, press relations.) Inbound marketing (competitive scanning, alliance management.) Manage operating budgets, personnel management. Liaison with City Public Works on facility janitorial services and improvement. Manage human resources functions and processes such as employee handbook, benefits packages, conflict resolution, and formal complaint management. Development planning including fundraising and endowment campaigns and events. Direct development operations for Museum funding, membership program, grants, major gift donations, capital campaigns, and events. |
| <b>Director of Community Engagement</b> <i>(1FTE)</i>            | Manage all aspects of Education and Exhibits Departments and staff, including oversight and execution of education programs for all ages. Ensure that permanent and special exhibits and interpretation meet the Museum’s strategic goals and American Alliance of Museum standards.   |
| <b>Events Coordinator and Store Manager</b><br><i>(1 FTE)</i>    | Coordinates Museum events including: Gala, Night Owl events, birthday parties, and all facility rentals. Manages buying and inventory for retail store.  |
| <b>Museum Guest Services</b><br><i>(totaling 1 FTE)</i>          | Greets Museum guests and serves as a front of house conduit of information. Enhancing visitor experiences through advice and information.  |
| <b>Museum Preparator</b><br><i>(.5 FTE)</i>                      | Responsible for daily monitoring, maintenance, and upkeep of exhibits to facilitate the best possible visitor experience.  |
| <b>Collections and Exhibits Manager</b><br><i>(1 FTE)</i>        | Manages and cares for Museum collection including exhibit installations. Work with subject matter experts and other Museum staff in identifying objects for exhibitions.<br>Implements Museum’s Collection Management Policies and Procedures, manages the Museum’s PastPerfect Database.  |
| <b>LiMPETS Coordinator</b><br><i>(1 FTE)</i>                     | Leads the LiMPETS program for the Monterey Bay Sanctuary region.   |
| <b>Community Science Specialist</b> <i>(1 FTE)</i>               | Assists the LiMPETS Coordinator in implementing the LiMPETS program and manages the Monarch Monitors program.  |
| <b>Education Programs Manager</b><br><i>(1 FTE)</i>              | Coordinates the Museum education programs including all aspects of class field trips.  |
| <b>Watershed Guardians Program Coordinator</b><br><i>(1 FTE)</i> | Deliver science programming in the field and in the classroom for children in grades 2-8. Responsible for communicating and scheduling with teachers for collaborative Watershed Guardians program.  |
| <b>Janitorial Services</b>                                       | Maintain Museum Facility’s cleanliness. <i>(Provided by City of Pacific Grove)</i>   |

|  |   |
|--|---|
| <i>(City)</i>  |   |
| <b>Volunteer Coordinator</b><br><i>(.5 FTE)</i>                        | Recruits and trains new volunteers, coordinates ongoing enrichment for established volunteers, ensures good communication for all volunteers.                           |
| <b>Bookkeeper</b> <i>(.2 FTE)</i>                                      | Manages Museum accounts payable and receivable and financial reporting.   |
| <b>Office and Database Manager</b> <i>(1 FTE)</i>                      | Provides administrative and project support to Museum Director. Oversees Guest Services staff and tracks facility upgrades and repairs. Manages all database functions. |
| <b>Development Director</b> <i>(1 FTE)</i>                             | Manages all aspects of fundraising activities including grant calendar and applications, donor stewardship, and fundraising programs.                                   |
| <b>Accounting and Financial Audit Services</b><br><i>(Contractor)</i>  | Payroll, accounting, tax returns, financial statements, and annual financial audit.<br><i>(outsource)</i>   |
| <b>Information Technology Support</b><br><i>(Contractor as needed)</i> | Support Museum's computer systems and website operations. <i>(outsource)</i>  |
| <b>Marketing Services</b><br><i>(Contractor)</i>                       | The Museum contracts with marketing professionals for press releases, media contacts, and graphic design.   |
| <b>Legal Counsel</b><br><i>(Contractor as needed)</i>                  | Site contracts, copyrights, licensing contracts, employment contracts. <i>(outsource)</i>   |

## V. TWO-YEAR BUDGET AND FUND DEVELOPMENT PLAN

The Museum's financial sustainability requires diverse funding. These include grants from governmental and private entities, direct fundraising in the community, museum membership, admission, visitor donations, and income derived from programs at the Museum.

The following budget is for the accounting period July 1, 2020 to June 30, 2021.

| <b>FY 2020/2021 Expenses</b>   | <b>Amount</b>  |
|--|----------------|
| Museum Collection and Facility   | 80,350         |
| Long-Term and Special Exhibitions  | 96,200         |
| Education (includes volunteer program)   | 269,518        |
| Marketing  | 44,250         |
| Advancement and Membership   | 94,814         |
| Museum services (e.g., guest services, store management and inventory, facility rentals) | 96,852         |
| Operations (including benefits, utilities, insurance, operating expense)                 | 286,033        |
| <b>Total Expenses:</b>   | <b>968,017</b> |

Below is the FY 2020 / 2021 Funding Plan to support expenses:

| <b>FY 2020 / 2021 Source of Support</b>  | <b>Amount</b>  |
|--|----------------|
| City of Pacific Grove  | 213,160        |
| Grants   | 144,750        |
| Contributions  | 298,750        |
| Membership   | 38,000         |
| Endowment income   | 33,000         |
| Special Events Income  | 6,000          |
| PPP Loan Forgiven  | 120,077        |
| Earned Gross Income Museum Services (e.g., Museum admissions, Store, education programs) | 147,280        |
|  |                |
| <b>Total Support:</b>  | <b>968,017</b> |

The following budget is for the accounting period July 1, 2021 to June 30, 2022:

| <b>FY 2020 / 2021 Expenses</b>   | <b>Amount</b>    |
|--|------------------|
| Museum Collection  | 80,778           |
| Long-Term and Special Exhibitions  | 97,504           |
| Education  | 279,137          |
| Marketing  | 49,250           |
| Advancement and Membership   | 96,500           |
| Museum services (e.g., guest services, store management and inventory, facility rentals) | 99,852           |
| Operations (including IT upgrades, health & safety training, utilities)                  | 297,000          |
|  |                  |
| <b>Total Expenses:</b>   | <b>1,000,021</b> |

Below is the FY 2020 / 2021 Funding Plan to support expenses.

| <b>FY 2020/2021 Sources of Support</b>                        | <b>Amount</b> |
|---|---------------|
| City of Pacific Grove   | 233,627       |
| Grants  | 200,000       |
| Contributions   | 298,701       |
| Membership  | 38,000        |
| Endowment income  | 33,000        |
| Special Events Income   | 40,000        |
| Earned Gross Income Museum Services (e.g., museum admissions, | 156,693       |

|  |                  |
|--|------------------|
| store, birthday parties, education programs) |                  |
| <b>Total Support:</b>                        | <b>1,000,021</b> |

## Exhibits and Programs Plan—2020-2021

- **Children's Exhibition - Fall 2020 (Permanent)**

This new exhibition will be focused on children ages 0-5. It will allow children to explore science by focusing on multiple local habitats and the invertebrates that inhabit them. It will also feature a playhouse replicating the original museum building, this space will serve as a kinetic exploratory space for young ones and a launching point for our programming for young children.

- **Changes Exhibition - November 2020 (Permanent)**

This new exhibition will address anthropogenic change throughout Monterey County by looking at individual ecosystems and how humans have changed them and continue to change them. Issues of water use, climate change, and habitat fragmentation will all be addressed through an interactive exhibition aimed at all ages.

- **The Power of Collections - Spring 2021 (Permanent)**

This new exhibition will highlight the Museum's amazing collection while discussing the importance of collections like it. This exhibition will take up the first floor of the Heritage Wing and discuss collections' contribution to science, historical understanding, and new forms of research.

- **Wildflower Show - April 2021 (Special)**

Presented in collaboration with the Monterey Bay Chapter of the California Native Plant Society, the Wildflower Show's wide representation of wildflower species and varieties make it the largest wildflower show in the Northern and Western Hemispheres - typically with over 600 species and varieties of Central Coast wildflowers!

- **Illustrating Nature - May-June 2021 (Special)**

Each year the Museum partners with the prestigious Science Illustration Program at CSUMB Extended Education to present art in the service of science. View artwork by the program's

graduating students, who are sought after by scientific institutions and publications around the world.

## **Programs for 2021**

### **- STREAM (Scientific Training, Research, Education and Monitoring) Project**

This multi-level program facilitates student engagement with, and understanding of, the natural world. Participants will collect data in their local environment, contributing information that allows resource managers to make better informed decisions for local communities and the environment.

The program works with around 11,000 students annually to collect data targeting three local indicator species: Pacific Mole Crabs, Monarch Butterflies, and Steelhead. Foundational lessons for elementary students investigate the natural history of these three creatures, while middle and high school students will take part in recording data in the field in three programs (LiMPETS, Watershed Guardians, and Monarch Monitors). In the coming year, education staff plans to work with students in person and virtually as a result of safety measures in place to reduce the spread of coronavirus. Virtual learning will involve training and lessons via video conferencing and self-directed in-class/home activities.

Elementary lessons are all hosted at the Museum where students have both a class lesson and time to explore the Museum. The lessons -- which all support national science standards -- range from learning about insects structures by dressing up as a butterfly, to predicting how climate will affect animals in the winter. Students also are able to explore the exhibits of the Museum, coming face to antennae with live sand crabs and searching high and low for specimens on their scavenger hunt.

Middle and high school students complete introductory classroom programs which will provide students with an overview of ecosystems, program specific indicator species and competitors, environmental threats, and data collection protocols. After completing data collection, students will then input this data into program databases to analyze the importance of their data in a broader geographic and temporal context.

The LiMPETS (Long-Term Monitoring Program and Experiential Training for Students) program provides ocean species health data from the Sonoma Coast to Los Angeles. Participants take part in one of two protocols: sandy beach monitoring or rocky intertidal monitoring. Sandy beach monitoring involves digging for mole crabs along a beach transect; then recording data on size, abundance, and other characteristics. Rocky intertidal monitoring involves observing tide pool organisms along a transect to determine species abundance. Data results are added and compared to 15 years of data collection.

Watershed Guardians participants collect data from the headwaters to the rivermouth of several local rivers to better record the downstream effects of humans on watersheds and the ocean; observing change along the watershed and in its wildlife; collecting important water quality data; drawing conclusions about the overall health of the ecosystems; predicting human impacts on the environment, and hypothesizing best management practices.

The Monarch Monitors program allows participants to monitor populations of overwintering monarchs while recording not only population numbers, but also atmospheric and weather conditions. Counting protocols have been developed and implemented with adults, and continues to be piloted with high school students.

The field science practice gives participants a greater self-awareness of their connectivity to the environment and inspires advocacy of the environment and their local communities. Participants in all programs develop communication and leadership skills while presenting their scientific findings to peers, their local communities, and local resource managers who can use the data to make informed planning and policy decisions.

In addition to these programs, the STREAM umbrella also covers the Museum's community science programs. These include MPA Watch, NOAA Plankton Monitoring, and Black Oystercatcher Monitoring.

- **Hardcore Natural History**

Hardcore Natural History is a year-round monthly lecture series. Every quarter Hardcore Natural History selects a theme and presents three evenings to examine that through three lenses: plant, animal, and cultural. Our speakers address the most current research in those three respective areas. In the coming year, we will be looking at alternatives, including limited attendance with a recorded option for those that can't attend. Previous themes have included: plastics, the Monterey Bay, and disease.

- **Science Saturdays**

Science Saturdays are family friendly events that have a variety of hands-on science activities for guests of all ages. Admission is free to everyone during Science Saturday, which usually falls on the last Saturday of every month during the school year (August-May), 10:00 am - 3:00 pm. Previous Science Saturday themes have included: Day of the Dinosaur, Migrations, Animal Athletes, and Water Wild. As with all events during the COVID-19 pandemic, plans will be flexible. Our current programming is Digital Science Saturday which incorporates different parts of a Science Saturday experience into a digital medium.

- **Junior Naturalist Club**

The Junior Naturalist Club is the Museum's membership offering for children aged 7-12. The club promotes discovery and enjoyment of the natural world, while encouraging curiosity and exploration in its members. The club meets once per month for an 'excursion', during which members will investigate a unique local ecosystem or animal. Excursions will be led and supervised by Museum education staff, and will range in length from 1-3 hours.

- **California Naturalist**

The UC Extension course, California Naturalist, covers the natural and cultural history of California, with an in-depth look at our local ecology. Through field trips, classroom instruction and hands-on exercises, participants will observe and learn about the variety of plant and animal communities of our region. Through the course, participants will develop their ability to observe nature and will learn tools to improve these skills. In addition, participants will improve their communication skills by sharing knowledge with other participants and by working on a group project.

- **Summer Camp**

The Museum offers 8 sessions of summer camps. For our 6 camps targeted to ages 4 to 6, campers explore the world of animals, studying the insects in their backyards to the creatures of the rocky shore. These students are able to explore all this using scientific tools and hands-on activities; they reflect their learning through guided discussions and art projects. For our two camps for ages 7 to 9, there are a variety of camps, one in which campers familiarize themselves with local ecosystems by sketching and painting the animals and environments of the Monterey Bay area. Lastly, "HERstory" allows young women to explore science and nature through experiments and outdoor adventures while learning about, and from, women in science.

- **Museum To You**

Museum To You is a digital Museum learning space that explores natural and local history. Programs include, Museum Monday's, Explore the Coast, Creative Community, A Closer Look, and Bug Out with Bree. These programs are hosted through Zoom and/or posted to the Museum's YouTube channel. All these programs can be easily accessed through the Museum's website. As programming reverts back to in-person experiences, the rate of Museum To You programming will slow.