



**CITY OF BIRMINGHAM
MUSEUM BOARD AGENDA
556 W MAPLE**

**Thursday, December 5, 2024
5:00 PM**

**MEETING LOCATION: Lobby and
Hunter House**

***Mission Statement:** The Birmingham Museum will explore meaningful connections with our past, in order to enrich our community and enhance its character and sustainability. Our mission is to promote understanding of Birmingham's historical and cultural legacy through preservation and interpretation of its ongoing story.*

1. Call to Order

2. Roll Call

3. Approval of the Minutes

Minutes of November 7, 2024

4. New Business

- A. Exhibit walkthrough (kitchen): Birmingham's Auto History and Diner Culture
- B. Friends' membership requirement and annual renewal

5. Unfinished Business

- A. Strategic Plan
 - Review/Comparison of Other Strategic Plans
 - Museum achievements, 2013-2024

6. Communication and Reports

- A. Director Report
- B. Member comments
- C. Public comments

7. Next Meeting: December 5, 2024

8. Adjournment

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**CITY OF BIRMINGHAM
MUSEUM BOARD MEETING
556 W. Maple
Thursday, November 7, 2024
5:00 PM**

Members Present: Bev Erickson, Alexandra Harris, Marty Logue, Pat Hughes
(left at 6:01 PM), Judith Keefer
Members Absent: Mike Abelson, Kristy Barrett (Alternate), Eva Kirkman,
Administration: Museum Director Leslie Pielack

The meeting was called to order at 5:00 PM by Chairperson Logue.

**Approval of the Minutes
Minutes of September 5, 2024**

MOTION: by Keefer, seconded by Logue:

To approve the minutes of September 5, 2024.

VOTE: Yeas, 5
Nays, 0

New Business

Members reviewed the proposed schedule for 2025 with changes in July and October due to holiday conflicts.

MOTION: by Harris, seconded by Hughes:

To approve the Museum Board Meeting Schedule for 2025.

VOTE: Yeas, 5
Nays, 0

Museum Director Pielack gave a brief introduction to the museum's Indigenous exhibit in the lobby, and how the museum is interpreting its Indigenous stone tools and Paleolithic artifacts. Because non-native visitors lack exposure to contemporary Indigenous culture, the display integrates past tradition with present tribal culture as it relates to some of the Anishnaabe-made items in the museum's collection. The museum also has tried to clarify its limitations in interpreting artifacts that were donated without context. Museum Director Pielack will include a brief presentation on a different aspect of the transportation exhibit at the beginning of each meeting to help acquaint the board with some of its uniquely Birmingham stories.

Members reviewed the revised Process and Timeline for the strategic plan and agreed by consensus with the proposed timeline. This would mean that

- in December and January, board members would review the status of existing strategic plan objectives and accomplishments (with data/metrics on audience reach and activity)
- will review City objectives in Sustainability Plan and Aging in Place Action Plan
- will review/modify vision, mission, and direction for the new plan

By February, the Museum Board will be looking at defining audiences and developing feedback process for integration into a final document later in the summer.

The board reviewed the readings in the agenda and raised the following issues:

- The question about greater **diversity on the board** being desirable but the board currently represents the community's demographics fairly well with the exception of age. We have one member who is a millennial, but the average board member age is older than the average age of Birmingham residents (42). Should the Museum Board actively recruit to better balance the board representation? (TBD)
- Discussion about **how the pandemic has changed audiences**; older people seem to still not be fully recovered in terms of their sense of safety, activity, and volunteerism; school-aged children learn differently and can be screen-dependent, making physical tours, contact with museum staff, and focus especially important. Technology is a key to remaining flexible, but Meanwhile, the museum was able to use the pandemic to revise, refresh, and become more dynamic with a committed and creative professional staff. This is not the case for many community museums, which have not adapted or changed their traditional approach. Some under-resourced local history museums have begun to seek ideas, tips, and guidance from the Birmingham Museum, and we have enjoyed collaborating with them. Should the museum have objectives that include collaborating with other museums? (TBD)
- Discussion about the **emerging role of museums as agents of support for community elders** through memory-strengthening programming that connects people with a community's past and engagement with each other, and the possibility of incorporating specific objectives focusing on the particular needs of seniors in addition to school children (TBD)
- Brief discussion of Artificial Intelligence and the City's guidelines. Generative AI is a type of AI like ChatGPT or Bing Pilot that takes a mixture of facts and creates a story or narrative about them, which can contain massive errors called 'hallucinations' that can confuse real facts and history for audiences. Therefore, the City, and especially the museum, will not be using generative AI.
- Other discussion reinforced the positive role and acceptance of the museum and that it is visible and valuable to the community. Successful application for grants and other financial support, awards, and other recognition have helped the museum steadily work toward improvements such as the landscape work. Having a plan and working in steps has been effective. Should the Museum Board use the strategic plan to identify and work toward more active fundraising? (TBD)

Communication and Reports

Museum Director Pielack provided updates to the October and November Director Reports, highlighting the new Museum Assistant, the transportation-related lectures at the Baldwin Public Library. She provided updates about where the museum is in the process of

developing the RFP for the CDBG Phase 3 Landscape Improvements (boardwalk and limestone path along pond). She also shared the cost estimates for Phase 3 and Phase 4 (brick patio, continuation of path, and overlook of the Rouge River). Phase 4 will hopefully also include federal funding but will likely not be planned until FY 2025-2026 or even 2026-2027.

Member Comments

Ms. Logue provided a brief summary of the Friends' recent board meeting and the Friends' interest in seeking a Museum Board member to join them, as they have one board opening.

Public Comments

None.

The next Regular Meeting is scheduled for Thursday, December 5, 2024, at 5:00 PM.

Ms. Logue adjourned the meeting at 6:36 PM.

Comparison Table of Sample Strategic Plans

Fifteen strategic plans of historical organizations and other museums at local, regional, and national levels and with both municipal and non-profit governance are compared based on several various features and elements of their plans. The Birmingham Museum is included at the bottom for additional comparison.

<i>Organization</i>	<i>Time Range</i>	<i>Vision</i>	<i>Values</i>	<i>Mission</i>	<i>Identity</i>	<i>Process</i>	<i>Major Goals/ Focus</i>	<i>Priorities ID'd</i>	<i>Measurable Tasks/actions</i>	<i>Document Utility</i>	<i>Other</i>
Troy Historic Village	2022-2027	X	X	X	X	X	X	X			Emphasizes strategies
Detroit Hist Society Museum	2015-2020	X	X	X			X	X	X		Action plans are summarized
Monroe County Museum	2021-2031	X	X	X	X		X	X			Lots of report content
R.E. Olds Transp Museum	2023-2026			X	X		X	X	Few		Numerous objectives listed
Castle Museum of Saginaw	2018-2022						X	X			Too thin/brief
Tri-Cities Historical Museum	5 year			X			X	X			Somewhat confusing
Lowell Area Hist Museum	2021-2025			X		X	X	X	Some	X	Straightfor-ward
Geneva Hist Museum	5-10 yrs	X	X	X	X	X	X	X	X	X	Concise but clear
Wayland MA Hist Mus	5 Year	X	X	X	X		X	X	X		Lots of detailed objectives
John Wesley Powell Museum	?	X	X	X	X	X	X	X	Few	X	Org's identity is clear
Morgan Library/Museum	n/a (2024)	X	X	X	X	X	X	X	X	X	Table of contents
Cumberland Cty Hist Soc Update	2015-2020	X	X	X	X	X	X	X	X	X	Progress report w/ graphs
Virginia Museum Hist/Cult	2024-2027	X	X	X	X		X	X			Themes organize goals, initiatives
Nat'l Museum of Amer Hist	2020-2030	X	X	X	X		X	X		?	Glossary
Birmingham Museum 2013/2016/2020/2024	2013-2024			X	X	X	X	X	X	X	Goals, objectives and tasks defined

The Troy Historical Society
Operational Managers of



STRATEGIC PLAN 2022-2027

June 2022

STRATEGIC PLANNING OVERVIEW

Nonprofits serve needs within the community that are critical. Demands upon all nonprofit organizations are increasing while resources and funding are decreasing. Creating a thriving and sustainable organization able to compete in the market and maintain and expand market share becomes paramount to the future of the Troy Historical Society.

Strategic planning is a critical element of the success of any nonprofit, providing clear and articulate definitions of whom the organization serves the measures of success, and the means to achieve success. Organizational alignment is the heart of successful strategic planning and the power source behind timely and effective implementation. The strategic plan and process serve as a framework for all key operational and business plans (including budgets) to improve short-term and long-term performance. The Board of Directors and the Executive Director are responsible for ensuring a dynamic and purposeful implementation of the strategic plan.

STRATEGIC PLANNING PROCESS for the TROY HISTORICAL SOCIETY

A strategic planning process began in January 2022 and culminated in a strategic framework for a five-year, 2022-2027 Strategic Plan. This ongoing strategic planning process emphasizes a stakeholder centered approach ensuring the board, leaders, staff, and community actively engage in the ownership of the process, the results, and its integration within the Troy Historical Society and the operation of the Troy Historical Village (THV).

The process included participation to ensure all points of view were represented with widespread commitment to the present and future vision, successes and areas of improvement, and the changing environment it operates in. The process included the identification of risk, data gathering, discussion, and recommendations on short- and long-term issues. The process also addressed challenges including organization's culture, mission, vision, competitive strategies, programmatic issues, relationships with the community, and internal needs to effectively move forward.

STEPS OF STRATEGIC PLANNING PROCESS

- Communication of strategic planning process to internal and external stakeholders
- **Environmental Scan**
 - **Stakeholder Survey w/ Internal and External Assessment and Gap Analysis**
 - Data Gathering/Review/Analysis
- **Board and Staff Sessions establish strategic framework**
 - **Review Mission, Vision, and Values**
 - **Identification of Strategic Issues and Priorities for 2022 - 2027**
 - **Goals and Objectives**
 - **Strategies – ongoing development of strategies/work plans with performance metrics/ongoing evaluation process identified for board priorities**
 - **Strategies – ongoing development of strategies/work plans with performance metrics/ongoing evaluation process identified by Executive Director and staff**
- **Implementation**
 - Realistic, measurable, and **prioritized strategies and action plans** with responsibilities and timelines will be developed by the Executive Director, the Board of Directors, and staff
 - The **established goals and objective with strategies directing specific activities and assignments will guide THV decision and actions for the next three to five years 2022-2027**
 - **Ongoing review process of strategic plan with special emphasis in 2026 to prepare for the next five-year plan.**

MISSION STATEMENT*

The Troy Historical Society activates discovery and cultivates life-long exploration of history by sharing and preserving heritage through creative, meaningful experiences that engage the community.

VISION STATEMENT*

The Troy Historical Society embraces and supports preservation through education, presentation and access to the artifacts, archives, and resources at the Troy Historic Village. These resources and activities enhance knowledge and historic context and provide opportunities for community development, social interaction, and open dialogue on issues of importance.

VALUES*

The Troy Historical Society provides a welcoming environment that:

- Engages visitors in positive learning experiences and social interactions
- Respects the significance of history as we seek knowledge, understanding and relevance in our lives
- Recognizes artifacts as social objects and catalysts for sharing information and ideas
- Embraces innovative and creative interpretive programs
- Encourages civil discussion and objective analysis and evaluation of controversial issues
- Promotes a stewardship and adherence to the highest standards of historic preservation; manages resources with integrity and transparency; and treats all peoples with dignity and respect

* Recommendation: Review and make appropriate modifications to Mission, Vision, and Values (as discussed in Board/Staff sessions).

ORGANIZATIONAL OVERVIEW

The Troy Historical Society (THS) was organized in 1966 as a non-profit, project-driven club focused on the preservation of Troy's pioneer era. THS spearheaded the development of the Troy Historic Village by saving threatened historic buildings in Troy and the region through gift or purchase, and raising funds to relocate and help restore the structures on the land around the City of Troy's 1927 Township Hall. Between 1968 and 2011 the Troy Historic Village grew into a local history museum, which highlighted Troy's past as an example of regional history. Significant THS facility projects include:

1969	Solomon Caswell House acquired by gift and moved to the open area behind the 1927 Township Hall
1978	An on-site workshop was rebuilt and furnished as a Print Shop. The Wagon Shop was moved from Troy Corners to the Village.
1980	Poppleton School was purchased and moved to the Village.
1981	Volunteers Rod and Dave Harris completed the forge for the Wagon Shop. The Log Cabin was moved to the Village from Monroe County.
1987	Troy Union School was donated by Robert Moser, moved to the Village, and re-designated Town Hall.
1989-90	Construction of the General Store was completed.
1997	THS and City of Troy purchased the old Troy Methodist Church and Parsonage and paid utilities and insurance on the buildings for 7 years.
2003-04	The church and parsonage were relocated to the Village on August 20, 2003. Both buildings were restored.
2005-07	THS purchased properties at 109 Lange and 90 W. Wattles Road and donated the land to the City to expand the Village to 4.89 acres.
2007-09	THS retained Hopkins Burns Design Studio to complete an expanded Master Site Plan for the Village.
2010-13	THS relocated the Niles-Barnard House to the Village and completed exterior repairs and sufficient interior repairs to receive conditional occupancy for staff, volunteers and potential donors.
2021	City of Troy completes historic rehabilitation of the Niles-Barnard House and THS provides furnishings and historic interpretation.

From 1969 to 2017 these facility projects were funded by \$1,364,375 of THS cash contributions and thousands of volunteer hours. If not for the advocacy and dedication of the Troy Historical Society, Troy may have lost these pieces of the past as it developed into the modern city it is today.

During the 40-year development of the Troy Historic Village, THS and the City of Troy have maintained a positive, cooperative, public-private partnership. THS worked methodically to preserve the community's heritage by expanding the historic resources of the Village. The Society contributed additional funds for programs and special events. THS volunteers also donate, on average, 3,000 hours of volunteer service annually. The City of Troy accepted ownership of the land, buildings and collections and provided funds to maintain and manage the Village through the City budget. The Village staff who developed programs and services and provided administrative support were originally City employees.

By 2009 the operations budget of the Village was over \$500,000 and the facility was staffed by two full-time and eight part-time employees. Over 26,000 people visited the facility that year, including 12,000 students and chaperones who participated in regionally recognized education programs.

Significant events in 2005 and 2010 changed the vision and work of the THS. In 2005, the 1837 Niles-Barnard House was donated to the City under the condition that it be relocated to the Village within five years. This prompted THS to purchase land to expand the Village and to envision a cultural destination that would meet the needs of the 21st century. The Society retained historic preservation architects to develop a new site plan that was unanimously approved by Troy's Planning Commission and City Council in 2009. Less than a year later, the City of Troy grappled with declining tax revenues due to the Great Recession. As part of major cuts in 2010, the Village budget was reduced 60%, a majority of staff members were laid off, and the Village facilities were slated for closure on June 30, 2011.

THS leadership determined that THS should keep the Village open by assuming operational management of the Village facilities. In May 2011, the THS Board of Trustees and City Council approved a renewable five-year management agreement, which was amended and renewed in 2016 for ten years. The major provisions of the current agreement are:

- The City retains ownership of the land, buildings, and collections. It is financially responsible for "core services" including utilities, insurance, the security system, repairs to the buildings, and seasonal maintenance of the grounds.
- The City also provides for an annual assessment of the historic buildings by a recognized historic preservation architect. This assessment will include a rolling five-year plan for capital repairs for the buildings to assist the City in preparing appropriate budgets.
- The City Manager assigns a liaison to facilitate payment of City-funded capital projects and communication with the THS leadership and Village staff.
- THS hires a full-time professional executive director to manage the Village.
- THS assumes fiscal responsibility for all Village staff, program expenses, collections management and expenses incurred in daily operations other than "core services."
- THS provides an annual report and audited financial statement to the City of Troy.

In 2011 and 2012 THS successfully transitioned to a nonprofit business with employees and management responsibilities. The organization implemented a lean budget, and developed new policies and procedures for bookkeeping, accounting, and human resources. Staff revived programs that had been reduced or eliminated in 2010, recruited and trained new volunteers, and created a new brand for the Village.

In 2013 THS adopted its first Strategic Plan—a comprehensive review the Village and operations, a look at the critical issues facing THS, and vision for growth. The three-year strategic plan provided a pathway to improve fiscal and organizational sustainability for THS and the Village. The Society recruited a more diverse Board, expanded regional awareness, improved branding and marketing including the development of a mobile-friendly website, and increased its community outreach. A second five-year Strategic Plan was developed and implemented in 2016. THS worked to increase community partnerships, further develop the interpretation and accessibility of the Village and collections, and better understand the needs of the community. With the Niles-Barnard restoration still incomplete, it became a key component of the 2016-2022 Strategic Plan. Working with the City of Troy, restoration plans were revised to focus programming and rental usage of the main floor and reducing overall project cost. The City of Troy approved \$700,000 in their 2019-2020 budget and the Niles-Barnard restoration was completed in 2021. An official ribbon cutting ceremony on June 7th, 2021, was the completion of Harriet Barnard's wish, the City's gift agreement, and THS's vision of expanding the capacity of the Village.

The 2020 Covid-19 Pandemic is another story of THS adjusting to a changing environment. School and business shutdowns abruptly halted programs, activities, and fundraisers in the Village's busiest season. Village staff worked from home and with THS Board support began modifying, expanding, and developing programs for a Covid climate. The Society became more flexible by implementing a 6-month budget and closely monitoring cash flow. In the end, the work of the staff coupled with generous donor support, and city, county, state and federal Covid funding enabled us to maintain safe, quality programming while retaining our talented and creative staff. In 2022, THS finds itself in the position to take the best programs and practices from the Covid pandemic, bring back core field trip programs, and chart a direction to further financial stability and organizational growth.

GOALS, OBJECTIVES, and STRATEGIC PRIORITIES

GOALS are the clearer statements of vision. **OBJECTIVES** are what will be accomplished. **STRATEGIC PRIORITIES (Strategy)** specify the accomplishment to be achieved if the vision is to become real. These are outcome statements to guide the Troy Historical Society as an organization.

GOAL 1 – Establish and maintain short-term and long-term financial stability

Objective 1: Identify diverse funding streams, evaluate and prioritize those with greatest potential

- Strategy:** Analyze current and design optimized budget distributions
- Strategy:** Develop long-term revenue generation opportunities including an endowment and legacy giving
- Strategy:** Explore the possibility of a city millage
- Strategy:** Determine current programmatic (education) and facilities revenue generation and potential of increase

Objective 2: Create and develop a Fund Development Committee

- Strategy:** Develop and implement a Fund Development Plan which may include the following streams of funding:
 - advertising
 - corporate partnerships
 - corporate sponsorships
 - City of Troy funding
 - state funding
 - grants
 - fundraising activities

Objective 3: Establish a cash reserve for short-term stability

GOAL 2 – Prepare for changes within the community, environment, and economy

Objective 1: Recruit, hire, support, and retain quality staff

Objective 2: Recruit and activate a dynamic board aligned with the village mission and vision

Strategy: Ensure board members have personal and professional connections and partnerships to leverage strengthening impact of THV's mission

Objective 3: Recruit, support and retain quality volunteers

Objective 4: Create, develop, and provide quality programs

Strategy: Evaluate overall success and cost effectiveness of all current programs, identify/create new programs, and improve current programs to ensure connection to the mission and an overall positive return on investment

- Create new programs that work in a post-Covid environment

Strategy: Explore technology opportunities in programs and access

- Explore remote programs and displays

Objective 5: Construct network of private/city/regional historic villages

GOAL 3 - Ensure diversity within the board, staff, and those served**Objective 1:** Broaden board representation and diversity

Strategy: Create a matrix to identify:

- current and future skills needed on the board in finance, marketing, legal, fund development, and potential new board members
- community partnerships that may be strengthened through board membership, may include School board members, Troy Chamber members, or others

Strategy: Increase active engagement as community ambassadors

Objective 2: Broaden staff representation, diversity, and understanding

Strategy: Identify existing and desired staff skills and staff experience

- Provide training for existing staff to increase knowledge, skills, experience

Objective 3: Identify and utilize strategic partners

Strategy: Identify partners among public and private schools and districts, the Troy business community, Troy cultural communities, and other “gaps” identified

GOAL 3 - Ensure diversity within the board, staff, and those served, continued

Objective 4: Understand and identify the communities THV should serve

Strategy: Define the market(s) for THV

- Identify the needs of our market(s)
- Identify key geographic areas to serve
- Identify specific segments/demographics (parents with children, ethnically diverse immigrants, etc.)

Strategy: Increase value to those served (existing and potential)

- Evaluate existing and future programs -profitability and driving increased community participation levels (Is the juice worth the squeeze?) (Related to #2)

Strategy: Identify and execute a plan of communication

- Identify traditional and nontraditional (virtual) marketing and advertising strategies

GOAL 4 - Establish THV as a cultural asset/resource to the Troy community and surrounding region

Objective 1: Better position THV for collecting and disseminating local history

Strategy: Engage in current events with the purpose of knowing/understanding how they become history

Objective 2: Become a resource and ally for local Historic Preservation

Objective 3: Enhance all visitor experiences

Strategy: Improve the Drop-In visitor experience

Strategy: Increase access to the village and to programs (physical and virtual) with continuous improvement of both

Objective 4: Increase public awareness of THV and offerings

Strategy: Identify and implement marketing to the public in existing and new ways as the marketing climate changes

- Track the effectiveness and reach of marketing tools
- Explore opportunities for non-paid marketing (HOAs, organizational newsletters, etc.)

Strategy: Participate in community events and other community organizations' events

GOAL 5 – Optimize Resources**a) Talent of board, staff, and volunteers b) artifacts and knowledge and c) facilities****Objective 1:** Optimize existing Facilities**Strategy:** Increase curb appeal (to attract visitors)**Strategy:** Develop best use of physical space in all buildings and of 5 acres of outdoor space**Objective 2:** Reimagine Master Plan with the City of Troy**Strategy:** Improve visitor flow and parking lot size and usage**Strategy:** Create a multi-use welcome/visitor center**Strategy:** Create outdoor teaching spaces**Objective 3:** Optimize use of artifacts and knowledge**Strategy:** Increase programming use and create seasonal rotations for “fresh views”**Strategy:** Ensure accessibility to the public and availability for use by community partners**Strategy:** Establish commercial displays (mini-exhibits)**Objective 4:** Create plan for continuous improvements and growth**Strategy:** Identify corporate support and expertise for success in modern world (related to #1 and #3)**Strategy:** Identify greater opportunities and responsibilities

APPROVED BY THE BOARD OF TRUSTEES
May, 2015

Detroit Historical Society Strategic Plan Overview 2015-2020

Mission

The Detroit Historical Society tells Detroit's stories and why they matter.

Vision

To be an integral part of Detroit's present and future by providing meaningful experiences that preserve and share its past.

Values

- **Authentic** – We demonstrate the highest level of integrity and scholarship in all of our words and actions, ensuring that our work is balanced and truthful.
- **Relevant** – We provide informative, engaging and dynamic experiences that help community members see their place in Detroit's history.
- **Creative** – We embrace fresh and innovative approaches to our work and mission, and encourage our board, staff and volunteers think imaginatively.
- **Professional** – We are dedicated stewards of assets held in the public trust, and our board, staff and volunteers are committed to carrying out the mission with the highest standards of excellence.
- **Inclusive** – We provide informative, engaging and dynamic experiences that offer opportunities to for broad and diverse participation.

Strategic Goals

Goal I - Community Engagement and Organizational Impact: to increase institutional relevance by leading and participating in bigger community conversations and engaging broad and diverse audiences.

Summary of Action Plan/Steps

- Investigate and adopt a business model for reaching communities that we currently do not impact that identifies key strategic partnerships/collaborations that have tangible outcomes for both parties. In addition, create or redesign onsite and offsite programs that target, attract and engage new audiences.

Goal II - Financial Stability: to develop a diverse revenue portfolio that ensures sustainability and growth.

Summary of Action Plan/Steps

- Explore various funding scenarios, including contributed income, earned income, public funding, mergers and/or partnerships, endowment and fundraising campaigns and develop a diverse fundraising strategy.

Goal III - Collection – Size, Management, Relevance, and Planning: to ensure the Society legally, ethically, and effectively manages, documents, cares for and uses the collections and that they are representative of and accessible to a broad and diverse audience.

Summary of Action Plan/Steps

- Develop and/or revise collections planning and policy documents and take appropriate implementation steps. Complete a full collections inventory and update records with condition reports and location information. Develop and take steps to implement a long term digital collection plan.

Goal IV - Awareness, Branding, and Marketing: to ensure the city, region and/or state has an expanded understanding of and connection to the Society's brand, mission, vision, and to engage in a diverse array of PR and marketing activities that result in increased public engagement and attendance.

Summary of Action Plan/Steps

- Create a baseline to measure current brand awareness and conduct assessment of current marketing vehicles. Use findings to create a fully integrated and effective marketing plan (including PR, social media and earned media.) Train and empower staff and board to actively engage in marketing.

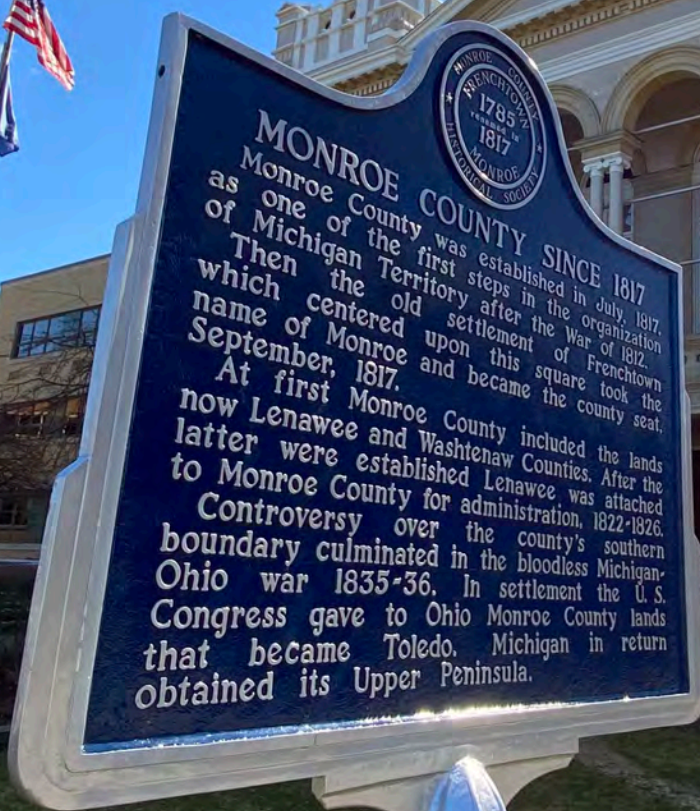
Goal V - Staff Development & Organizational Culture: to cultivate a thriving institutional culture that promotes and engages in activities that improve staff skills and competencies, job satisfaction, retention and diversity, and document standard operating procedures and policies that support continuity, stability, and succession.

Summary of Action Plan/Steps

- Standardize finance, HR and other internal policies and processes and develop, document and adopt departmental standard operating procedures. Promote internal and external professional development opportunities and foster inter-departmental collaboration.

MONROE
★COUNTY★
MUSEUM
SYSTEM

Vision for a New Decade



January 2021

Monroe County Board of Commissioners

Name	Title	District
Mark Brant	Chairman	2
Randy Richardville	Vice-Chairman	5
David C. Hoffman	Commissioner	1
Dawn Asper	Commissioner	3
George L. Jondro	Commissioner	4
Sharon D. Lemasters	Commissioner	6
David Swartout	Commissioner	7
Greg Moore, Jr.	Commissioner	8
J. Henry Lievens	Commissioner	9

Monroe County Museum System Board of Trustees

Name	Title	District
Brian James Egen	Chairman	6
Jeremy Potter	Vice-Chairman	1
Thomas Heywood	Secretary	2
Mary Strevel	Trustee	3
L William Conner	Trustee	4
Richard Micka	Trustee	5
Tony Trujillo	Trustee	7
Michael Humphries	Trustee	8
Nicholas Guthrie	Trustee	9
Hobby Nels	Past Chair	---
Richard Sieb	Trustee Emeritus	---

Monroe County Museum System Staff

Operations Division

Andrew Clark, Director
JJ Przewozniak, Deputy Director
Mike Nelligan, Operations Attendant

Local History Division

Lynn Reaume, County Historian
Robert Lutey, Registrar
Rachel Reaume, Local History Specialist

Exhibits Division

Gerald Wykes, Exhibits Coordinator
Emily Phillips, Exhibits Specialist

Programs Division

JJ Przewozniak, Deputy Director
Lisa Gessner, Lead Presenter
Heather Piegza, Presenter
Robin Laurinec, Presenter

Guest Services Division

Megan Mullins, Guest Services Coordinator
Ann Morris, Guest Services

Chairman's Letter

History matters. History is relevant. When the Pew Research Center conducts a study on trusted institutions, museums always rank a close number two behind libraries. This is a tremendous amount of power and responsibility that museums possess. Though history is about the past, it was never intended for those who have passed. It is about our lived experience, it is about our connections, it is about our story to inspire a better future.

Large and small, in cities and rural locations, Museums are helping to strengthen communities and contribute to not only quality of life enhancements and placemaking, but as an economic driver in heritage tourism. Additionally, cultural institutions are working to foster thoughtful discussions and dialogue about what's important in their communities and the nation. Museums have the great capacity to help people make sense of the past to navigate the future.

By using a variety of learning techniques, museums are dynamic learning hubs, using the power of stories and artifacts to cultivate engagement, teach and inspire. Museums touch lives and transform the way people see the world and each other. Whether it's through power of the collection seeing the real thing, through a hands-on experience, or learning a story from the past, museums can touch that secret place of awe in everyone. Museums can ignite that spark.

Working with solid base that has been created over the past several decades, the Monroe County Museum System has been thinking and planning how to leverage our great potential for the next ten years and beyond. Over the past two years, we have been working closely with nationally renowned and respected museum professional Donna Braden toward that goal. Ms. Braden has led us through the American Association for State and Local History's Standards and Excellence Program for History Organizations (StEPs).

Completing the StEPS self-study assessment program in the spring of 2019 has enabled us to create a solid and robust roadmap for the future. The Monroe County Museum System's Vision for a New Decade is a strategic plan and long-range vision that outlines the key strategic initiatives that will provide a 10-year trajectory of relevance, sustainability, community impact, educational engagement, and cultural intensification that will continue to enhance the quality of life for residents and guests.

Our strategic plan will enable us to serve as active participants in the economic development and growth of Monroe County. Educational outreach and impact extending to the four corners of the County will ensure a vibrant and thriving community. With collaborations and partnerships with key stake holders, the Monroe County Museum System will deliver on the full potential of what a museum can be for not only the region but anyone who visits Monroe. Through our collections, programs, and stories, we will make the past relevant and inspire a better tomorrow.



Brian James Egen,
Chair, Monroe County Museum System Board of Trustees



A Note from the Director

Nearly ten years ago, the Monroe County Historical Museum was on the eve of being shuttered in the wake of the Great Recession of 2008.

In 2012, unable to contemplate seeing one of the county's core cultural institutions closed, a group of concerned citizens rallied together under the banner of Save Our Stories to keep our doors open. They were successful. In August of that year, the citizens of Monroe County generously approved our first millage, guaranteeing our ability to operate through 2022.

Over the last decade, we have fortunately recovered and transformed. Reorganized and rejuvenated as the Monroe County Museum System, we have become a seven day a week operation across multiple historic sites, offering engaging programs to an array of age groups, and preserving and telling the stories that make Monroe County one of the most unique and historic communities in Michigan.

The work of history is never completed. We are only the temporary stewards until we can pass it on to the next generation. In our Vision for a New Decade, we will go beyond just saving our stories – because there are always more stories to tell.

A handwritten signature in blue ink, which appears to read "Clark".

Andrew Clark
Director, Monroe County Museum System

Executive Summary

Over the past two years, the Monroe County Museum System has been working with Donna Braden, Chief Curator at The Henry Ford in Dearborn, Michigan. Ms. Braden, a nationally respected museum professional, has led the Monroe County Museum System through the American Association for State and Local History's Standards and Excellence Program for History Organizations (StEPs).

StEPs is AASLH's self-study, self-paced assessment program designed specifically for small to mid-sized history organizations. Through a workbook, online resources, and an online community, the 1,000+ organizations enrolled in StEPs review their policies and practices and benchmark themselves against national museum standards.

Completing the StEPs program in the spring of 2019 has enabled us to create a solid and robust roadmap to the future. The Monroe County Museum System's Vision for a New Decade is a strategic plan and long-range vision that outlines the key strategic initiatives that will provide a 10-year trajectory of relevance, sustainability, community impact, educational engagement, and cultural intensification that will continue to enhance the quality of life for residents and guests.

Our Foundations

Mission

At the Monroe County Museum System, we fuel and cultivate our visitors' curiosity through the exploration of Monroe County's rich and varied stories, joining together to unearth meaning and illuminate connections between the past, present, and future.

Vision

The Monroe County Museum System is to be an essential part of Monroe County's present and future through audience awareness and responsiveness, increased community focus, responsible public history practice, and good stewardship of our assets.

Values

We strive to increase the quality of life of Monroe County residents and guests to our region through sharing stories of the past making relevant impacts today and for future generations.

We are committed to the educational value of our stories, programs, collections and sites to inspire awareness, appreciation and proud ownership with sense of place.

We appreciate and hold our public responsibility in high regard. As a county millage funded organization, we are dedicated to demonstrating the value added to our community and region for today, and for future generations.

Strategic Priorities

Our vision is to be an essential part of Monroe County's present and future through:

Audience Awareness, Responsiveness, and Collaboration

Create wider public awareness that the Monroe County Museum is not just one building but a system of sites. Through collaboration, partnership and alliance building with key stakeholders, we will instrumentally contribute to Monroe County's successful growth.

Expanded Educational Initiatives

Enhance, expand, and be more responsive to the educational needs of all of Monroe County's students (public, private, parochial, and homeschooled). Diversify offerings through field trips, in-classroom programs, electronic platforms, educator support materials, curriculum development and bussing assistance.

Increased Community Focus

Build upon existing—and cultivate new—partnerships, collaborations, and audiences.

Heritage Tourism and Economic Development

With a variety of offerings across all MCMS sites, we will enhance countywide heritage tourism efforts to fuel economic growth and development. Using increased resources, create broader awareness through a variety of marketing platforms to promote all of Monroe County and its various heritage assets.

Responsible Public History Practice

Identify, take advantage of new research about, and celebrate both the well-known and more obscure stories related to city, township, and county-wide human and natural history.

Enhanced Guest Experience

Welcome guests of all abilities and enhance the guest experience in both the museum building and within the county-wide system of sites.

Good Stewardship of Our Assets

Provide greater access to the Museum's collections, improve collections storage facilities, and implement physical upgrades within the county-wide system of sites.

Diversify Offerings Through Re-Invention of Our Operating Model

Explore potential new business model opportunities with out-of-the-box strategy to re-package our stories, spaces and sites such as hosting conferences, themed catered events as a venue, and more. This could provide new revenue to support the capacity to create a more robust presence and enhanced quality of life.





Goals

- Strengthen our Community Relevance
- Grow County and Regional Impact
- Enhance Guest on-site Experiences
- Improve Accessibility, Diversity, and Inclusion
- Sustain and Contribute to Regional Heritage Tourism Initiatives
- Increase National Awareness (through our national stories)
- Improve Service through Staff Enrichment
- Build core competencies, skills and expectations
- Service and hospitality training

Actionable Objectives to Support Our Goals

- Stewardship of historic structures
- Develop an interpretive plan for Monroe County Museum building, including exhibits (with accessibility plan and Universal Design guidelines)
- Develop a community engagement strategy for talking to members of the community
- Create a marketing plan
- Network with other community entities to identify potential new museum audiences
- Develop and implement a collections storage plan
- Create a disaster response and recovery plan for museum, collections and historic structures
- Establish a housekeeping and maintenance plan for museum, collections and historic structures
- Create a community profile, using already existing sources for demographics, trends, etc.
- Develop and implement a visitor evaluation plan
- Develop a written policy to systematically collect, organize and transfer documents of the institution's history and development
- Develop a code of ethics based on national museum standards and practices
- Document decisions and procedures related to acquiring, loaning, locating, using, deaccessioning and disposing of collections
- Develop policy of guidelines on customer service expectations for paid and unpaid staff
- Review directional signage along roadways

Governance

The Monroe County Museum System (MCMS) is a department of the County of Monroe, Michigan with ultimate operating and budgetary governance resting with the Monroe County Board of Commissioners, a nine-member elected body. Oversight of the MCMS is by the Monroe County Museum System Board of Trustees, an eleven-member appointed body. Nine of the members of the Board of Trustees are appointed by their member of the Board of Commissioners to represent one of the county's nine districts. The immediate past chair and trustee emeritus comprise the remainder of the Board of Trustees.

The MCMS is comprised of five divisions. The Operations Division which encompasses all functions of the MCMS is the responsibility of the Museum Director and Deputy Director, who report to the County Administrator/Chief Financial Officer. The Programs Division is headed by the Deputy Director and is responsible for programming across all sites and outreach to non-MCMS sites. The Local History Division, headed by the County Historian, is responsible for the Monroe County Archives and stewardship of all archival and three-dimensional collections owned by the county. The Exhibits Division is headed by the Exhibits Coordinator and produces all exhibit content across all MCMS sites. The Guest Services Division is headed by the Guest Services Coordinator and has the responsibility of ensuring frontline operations across all staffed MCMS sites.

Funding

From 1966 to 2010, funding for the museum was from the County of Monroe's General Fund. As a result of the Great Recession, the museum was required to find a new, stable source of revenue outside of the county's general fund.

Though the idea of a museum millage had been floated years previously, it was not until the potential closure that a concerted effort was made to seek approval for a dedicated millage. In 2012, the Save Our Stories Committee spearheaded a campaign to win the museum's first operating millage. Through their hard work and – of course – the approval of the citizens of Monroe County, the museum received its first millage in August of that year. Presently, the Monroe County Museum System operates on a .1 operating millage. During the 2020 fiscal year, the County of Monroe forecasts that the millage will generate \$621,634 in operating revenue. The current millage expires in 2022.

Working with the County of Monroe Finance Department, the Museum Director creates a two-year operating budget which is submitted the Board of Commissioners for approval.



A Brief History:
*From Historical
 Society, to Historical
 Commission, to Board
 of Trustees*



Opened in 1939, the Monroe County Historical Museum was originally a project of the Monroe County Historical Society which was organized only the year prior. For its first thirty-four years, the museum was located in the Sawyer House, 320 East Front Street, which it shared with other civic organizations. Through the generosity of the founders of La-Z-Boy, the historical museum moved to its own facility and

present home, the former United States Post Office, located at 126 South Monroe Street, in 1973.

During the 1960s and 1970s, the Historical Commission acquired the Papermill School, and the Navarre-Anderson Trading Post. In the 1980s, the Navarre-Morris Kitchen and Third Street Storage Facility were secured, and the French-Canadian Barn was built. In the early 2000s, the Vietnam Veterans Memorial and Museum opened to the public at Heck Park.

Following the request of the historical society, operations and collections of the Monroe County Historical Museum were transferred over to the County of Monroe in 1966. At this time, the Monroe County Historical Commission was formed by the county to oversee museum operations. As part of an institutional reorganization, the Monroe County Historical Commission became the Monroe County Museum System Board of Trustees in 2020.



Our Facilities



Monroe County Museum

126 South Monroe Street, Monroe, Michigan 48161
Year-Round; Open Daily. (Closed most major holidays.)

The Monroe County Museum (MCM) is the center of operations for the MCMS. The MCM is the MCMS's main exhibit and programs space. Originally built as a United States Post Office in 1911, it has been added on to in 1933, 1936, and 2000. It was purchased in 1972 by the founders of La-Z-Boy to serve as the county's new local history museum.

At 19,740 square feet it is the largest building the MCMS's inventory. About half of the building is dedicated to exhibits, about one quarter dedicated to collections access and storage, with the remainder dedicated to programming areas, offices, workshop space, and restrooms. Though home to all of Monroe County's history since 1939, the MCM has been mostly known for its Custer Exhibit which has led it to be erroneously dubbed the Custer Museum. The Monroe County Archives and Genealogical Society of Monroe County Archives are both located in the MCM.



Monroe County Archives

126 South Monroe Street, Monroe, Michigan 48161
Year-Round; Open Tuesdays through Saturdays and by appointment. (Closed most major holidays.)

Though archival collections are stored throughout the Monroe County Museum, the public access area to the archives is located on the second floor of the museum. Day to day operations of the Monroe County Archives (MCA) is under the oversight of the MCMS's Local History Division. Presently, archival collections totaling approximately 2,500 linear feet are stored in the reading room, second floor archival storage, attic, and basement archival storage. The MCA is known for its extensive collection of obituaries.



Territorial Park

3815 North Custer Road, Monroe, Michigan 48162
Grounds open Year-Round. Structures open seasonally from May to October.

Territorial Park (formerly the Navarre-Anderson Trading Post Complex) is located in both Frenchtown and Raisinville Townships. Territorial Park is home to a significant collection of historic buildings such as the 1864 Papermill School, 1789 Navarre House (one of the oldest wooden structures in Michigan) and 1810 Summer Kitchen. These buildings are

joined by a reproduction bread oven and French-Canadian Barn. Only the Papermill School, bread oven, and barn are original to the site.

Territorial Park hosts several school tours and programs throughout the year. Lantern Tours, entering its forty-third season in 2021, is one of our most well-known and popular events.



Vietnam Veterans Memorial and Museum

1095 North Dixie Highway, Monroe, Michigan 48161

Memorial: Open Year-Round. Museum: Open seasonally between May and September on Wednesdays and Saturdays.

Located at Heck Park, named in honor of Captain Norman W. Heck, Jr. who died in service to his country during the Vietnam War in 1964. The site features a memorial that recognizes the service of all local veterans of the Vietnam War, a walking path, one AH-1 Huey Cobra helicopter, and the iconic Huey UH-1M. It is Jointly operated with Monroe County Parks and Recreation and Vietnam Veterans of America Chapter 142.

The site also features the Vietnam Veterans Museum which includes items from the collection of the MCMS and items acquired by VVA 142. It also offers traditional recreational opportunities to the public. A county historical marker recognizes the site as the site where the British and their Native allies started their assault on the River Raisin in January 1813.

Third Street Storage Facility

229 Third Street, Monroe, Michigan 48161

Storage facility. Not open to the public.

The Third Street Storage Facility is 3,687 square feet and was acquired by the Monroe County Historical Society and donated to the County of Monroe in 1991 to replace another storage facility. Third Street houses a variety of oversized artifacts that are unable to fit in storage at the main museum. It is also home to surplus building materials and retired exhibits. Over the last few years, a bulging wall has been stabilized, a new roof has been added, and the facility has been painted. Several attempts have also been made to discard surplus items and trash from the building.

As it lacks any climate control, the facility is less than ideal for the long-term storage of artifacts entrusted to the care of the MCMS.



By the Numbers

Visitation

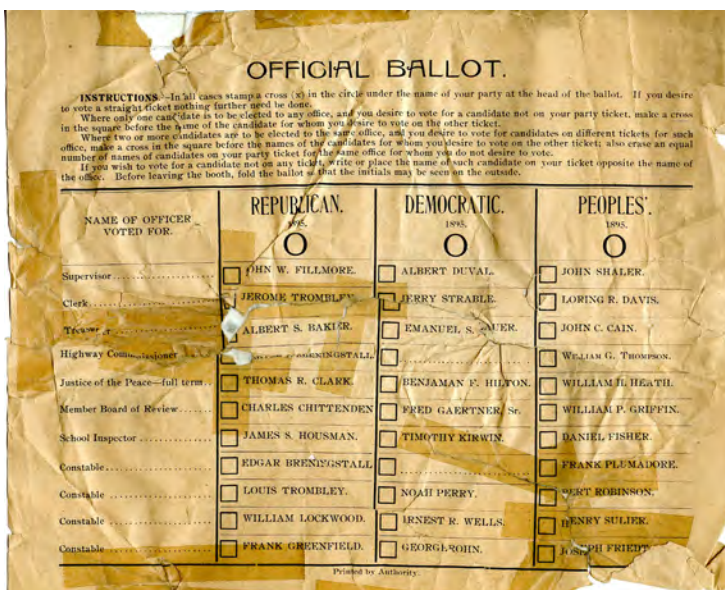
Based on visual counts, self-registration, and vehicle counters, during 2020, the Monroe County Museum System recorded over 46,000 direct engagements across all sites. Through our online presence across various social media platforms, we had over 308,000 indirect engagements. We anticipate increased direct engagements across all sites over the next decade.

Guests to the Monroe County Museum System are generally county and Michigan residents. We receive a variety of out-of-state visitors with high representation from Ohio and Canada.



Local History Division

For over eighty years, the museum has been collecting artifacts and archival collections to preserve and present the story of Monroe County Michigan. Presently we have over 30,000 three-dimensional items in our collection. We house approximately 2,034 linear feet of general archival materials, nearly 400 linear feet of obituaries, and around 1,440 cubic feet devoted to bound and unbound newspapers. (In total we have a little under one half mile of archival collections or roughly equal to 14,604 reams of printer paper or 7,302,000 sheets.)



The MCMS's obituary files remain one of the most popular resources for researchers in the Monroe County Archives. The online obituary search maintained by museum staff and volunteers remains one of the most visited components to the county's website.

Museum Operations

Free Admission: As a publicly funded museum system, we make a point to ensure that visiting the museum or attending our special events is zero to little cost to in-county guests. For out-of-county guests, we only request a suggested donation. However, no visitor is ever turned away due to an inability to pay admission or give a donation.

Historical Projects Fund: From 2015 through 2021, we will have provided or committed over \$175,000 in support of local historical organization and local units of government through our Historical Projects Fund. (Please see Appendix A for further detail.)

Spirit of Service Awards: One of our most important programs is the Spirit of Service Awards. We recognized that many of those who give generously of their time to the service of local history were not being properly thanked for their contributions to the field - it is our goal to ensure that they are.

Territorial Park: Perhaps the largest undertaking for the 2020s is the fulfillment of a vision to create a living history site representative of the early French-Canadian ribbon farms that once populated the region. At Territorial Park, we will be providing a series of upgrades and improvements over the next few years that we anticipate will total around \$500,000.



Educational and Outreach Programs



Core Educational Programs: Among the core educational offerings for area students, the Monroe County Museum System programs focus on Woodland Natives, Early French-Canadian Settlement, and George and Libbie Custer. A trip to Territorial Park is also a traditional stop for area educators. All core programs are free to Monroe County students.

Sponsored Outreach Program:

One of our more recent educational opportunities has been the sponsorship of regional educator Genot Picor. During in classroom visits, Mr. Picor works with student audiences of various grade levels through storytelling, song, dance, and hands on activities to educate them about French-Canadian, Metis, and Native cultures.

Museum App: Launching in Spring 2021, the Monroe County Museum System will be taking another step forward in delivering digital content. The app, which will be available on Android and Apple platforms, will provide residents and tourists with new opportunities to engage with the MCMS and discover our county's unique stories.

Bussing Program: Between 2015 and 2020, we will have provided nearly \$17,000 to local schools with bussing sponsorships to visit MCMS sites. And, unlike many museums, we do not charge a fee to attend our educational programs.

Senior Outreach: Among our more recent endeavors are taking programs to senior centers and assisted living facilities. These programs are well received, and our programs staff have been invited back multiple time across the county. Like our youth educational programs, they are offered at no cost.

First Fridays: Occurring the First Friday of every month, the Programs Division staff offers a variety of games and activities related to different pop culture or historical themes. Due to the family friendly nature of First Fridays, it has become one of our more popular programs.

Tales By Twilight: At Territorial Park and Sterling State Park audiences of all ages join us for a night of storytelling and s'mores.

Lantern Tours: One of the MCMS's signature events, Lantern Tours is one of the longest running activities of the Monroe County Museum System. Held in October, participants are guided through a series of vignettes that explore exciting aspects of regional history.



Camps: Over the last few years, the Monroe County Museum System has hosted Civil War and Archaeology Day Camps for middle school aged children. Civil War day camp was held in conjunction with the Ellis Library of the Monroe County Library System.

Speaker Series: Every year the Monroe County Museum System hosts lectures at the Monroe County Museum.

Topics range widely from the War of 1812, George Armstrong Custer, Prohibition, the Monroe Monster, and Great Lakes Shipwrecks. In conjunction with the City of Monroe Parks and Recreation Department museum staff have presented lectures on various topics such as private and public buildings in Monroe and the development of Sterling State Park. In response to COVID-19, during 2020

and 2021, our Speaker Series went on-line and attracted attendees not just from Monroe County but from across the state, across the country, and across the world.



YourStory: Continuing in the tradition of Marion Childs and Jim DeVries, the MCMS is embarking on a multi-year effort to chronicle the lives of Monroe County residents. This oral history film project will capture the personal stories of a variety of age groups, local perspectives on historical events, and underrepresented communities

Christmas at the Museum: Every December, the Monroe County Museum is populated with dozens of trees and wreaths throughout the museum. For the duration of

the holiday season, the south lobby becomes home to extensive Santa Claus and holiday village collections. Christmas Tree Festival is the oldest running special event of the Monroe County Museum System and has become an annual holiday tradition for many residents.

The Grapevine: The MCMS's monthly electronic newsletter.

Museum Exhibits and Marker Program

Signature Exhibits: We have made a number of significant upgrades in our public spaces and exhibit areas. One of our most visible changes is our signature exhibit *200 Years and Counting: A Monroe County History* that is located in Sieb Hall, our primary exhibit gallery. Of course, we are well known for our Custer Exhibit that continues to attract visitors from across the country.

Temporary Exhibits: Every year we produce in house exhibits focusing on various aspects of the county. In recent years we have featured exhibits about pets and Lake Erie.

Bicentennial Panel Exhibit: As part of the county's bicentennial, we produced panel exhibits exploring the history of the various communities that comprise Monroe County. The exhibits were distributed to several branches of the Monroe County Library System.

Travelling Exhibits: As part of continuing outreach efforts, we now offer small travelling exhibits that are hosted at the Monroe County Museum but also across the county. Recent exhibits have covered the local history of prohibition, and the sturgeon, and womens' suffrage.



Marker Program: Some of our more recent initiatives has been to revive the dormant county historical marker program. Starting in the 1950s, local historical agencies began installing cast aluminum markers throughout Monroe County to recognize individuals and sites of significance. Unfortunately, nearly two decades ago, the program and maintenance of the markers ceased. In 2018, the MCMS started a system of refurbishing the old markers and beginning the installation of new ones. The first round of new markers with newly designed marker seals were installed in the summer and fall of 2020.



“Museums can’t be community centers,
but they can be the center of the Community.”

-Lonnie Bunch, Director of the Smithsonian Institution



Cultivate Your Curiosity!



www.monroecountymuseum.com



Appendix A: Historical Projects Fund Awards

Date	Organization	Project	Amount Awarded
April 2015	• Airport School/ Niedermeier Center	Monroe at Normandy Exhibit	\$3,650
	• Dundee Old Mill	Preservation	\$9,318
	• Friends of Potter Cemetery	Fencing Project	\$5,000
	• Sawyer Homestead	Equipment Refit	\$2,390
		Total:	\$20,358.00
April 2016	• Dundee Old Mill	Archival Project	\$9,090
	• Friends of Potter Cemetery	Maintenance and Marker	\$9,500
	• Milan Area Historical Society	Public Programming	\$1,000
	• Sawyer Homestead	Founder's Day	\$2,914.90
		Total:	\$22,504.90



December 2016	Airport School/ Niedermeier Center	European Air Campaign Exhibit	\$4,300
	Dundee Old Mill	Sound Post	\$5,000
	Sawyer Homestead	Founder's Day	\$2,327
		Total:	\$11,627.00
June 2017	Friends of the River Raisin Battlefield	Archival Materials	\$3,602.00
	Dundee Old Mill	Exterior Painting	\$15,000
	Ida Backyard History	Various	\$1,474.91
	Sawyer Homestead	Lighting – Cleaning and Restoration	\$3,500 (Tabled; never dispersed.)
		Total:	\$20,076.91

May
2018

- Dundee Old Mill
- Potter Cemetery
- Sawyer Homestead

HVAC Upgrades
Maintenance
Founder's Day

\$10,000
\$5,035
\$2,215
Total: \$17,250



May
2019

- Berlin Township
- Old Mill Museum
- City of Monroe
- Exeter Historical Society

Historical Marker
Climate Control
Memorial Place
Barn Relocation

\$2,540
\$7,595
\$10,000
\$8,106.40
Total: \$28,241.40



May
2020

- Milan Area Historical Society
- Old Mill Museum

Preservation
Preservation

\$6,000
\$10,000
Total: \$16,000

November
2020

- Bedford Township
- Old Mill Museum

Banner Oak School
Preservation

\$6,000
\$3,465
Total: \$9,465.00

May
2021

\$30,000 (Committed)

Total Historical Project Fund Awards to Date: \$175,523.21



Monroe County Museum System
126 South Monroe Street
Monroe, MI 48161

www.monroecountymuseum.com
734.240.7780





REOLDS
TRANSPORTATION
MUSEUM

STRATEGIC PLAN 2023

OVERVIEW

The Lansing area's automotive heritage continues to have a great impact on the region's social and economic outlook. If not for the birth of the mass manufacturing of cars and trucks that began in Lansing the world, but especially this city, would be an entirely different place. The RE Olds Transportation Museum strives to be at the forefront of understanding and interpretation of this long history by being a "pace-setting" museum of cultural and social relevance for the Lansing area, the region, the state, and the country.



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MISSION

The RE Olds Transportation Museum preserves and promotes Lansing's automotive heritage, its lasting impact on the mid-Michigan community, and the American automotive industry.

The R.E. Olds Museum was incorporated in 1977 on the incentive of a study task force of the Greater Lansing Chamber of Commerce. After site selection and renovation, the Museum opened to the public on May 18, 1981 at its present location. The Museum rented its building from the City of Lansing until February 2018 when the city sold it to the museum for \$2.

Today, the museum houses an extensive collection of automobiles, engines, and other automotive materials significant to the transportation history of the region. The James D. Butt Archives contains hundreds of thousands of pieces of ephemera such as photographs, drawings, manuals, newsletters, and other records. The R.E. Olds Transportation Museum and the Bates and Edmonds Engine Company offices are resources within the Lansing Stewardship Community of Motor-Cities-National Heritage Area, an affiliate of the National Parks Service. Operations are funded primarily through the financial support of members and donors.





STRATEGIC PLAN

In the fall of 2022 a new Executive Director was hired and the Board of Trustees agreed to undertake a new three-year strategic plan. The services of long-experienced John Beck, a professor at Michigan State University, were enlisted as facilitator. Everyone (including all volunteers) were invited to be a part of the strategic planning committee.

Why Do Strategic Planning?

To focus the financial, cultural, social activities, and possibilities of the museum over the next three years (starting Fall 2023). To understand and improve stakeholder communication and engagement, current and future financials, increase efficiencies, and to generally improve operations with clear goals and priorities.

How Planning was Developed

After Mission Statement was developed and workshopped areas of Goals and Objectives were defined and data was collected via surveys: Membership (online questionnaire), Visitors (online questionnaire), and Volunteers (in-person). The areas then determined on which to focus going forward from this data were to include:

- Financial Goals
- Membership Goals
- Thematic Goals
- Visitor Experience Goals
- Visitor Goals
- Volunteer Goals

FINANCIAL GOALS

Long-term financial solvency by the museum's ability to produce a net positive bottom line, year after year.

Objectives/Strategies:

1. Review, understand, and if needed alter all expenses of the museum (cost management, building maintenance and improvements).
2. Review the membership renewal process and if required make changes.
3. Establish reserve accounts – rainy day fund and “revolving” fund that can be used for non-budgeted opportunities or unbudgeted expenses.
4. Increase the rental usage of the museum.
5. Understand and identify grant funding and foundation funding opportunities.
6. Resolve the issue of the “restricted” funds.
7. Museum inventory evaluation with an eye toward sales – conduct and inventory assessment and sell off agreed upon items.
8. Upgrade the museum's gift shop inventory.

MEMBERSHIP GOALS

Grow our membership by delivering an exceptional visitor experience. Also: Engagement and Relevance as goals.

Objectives/Strategies:

1. Understand both the current number of members, annual sales, and retention rate.
2. Evaluate the membership sales and retention process of the museum – is there a volunteer role?
3. Develop new membership markets with an eye toward diversifying the membership (age and race).
4. Evaluate membership categories and build a member value index (what does the member get at various levels).
5. Identify and grow the opportunities to connect the museum to various organizations within the community (GM, UAW, Convention and Visitors Bureau, Chamber, Youth groups, etc.).
6. Look for opportunities to work with other museums and organizations (State and Lansing Historical Societies - bundled memberships, 2 for 1 admission, etc).
7. Establish a marketing plan for the museum (grass roots, social media, etc.) to include:
 - Membership drive, 50 new members per year (or 100+ during life of plan).
 - Corporate memberships.
 - Tie donations (car shows, etc.) to memberships.
 - Partnerships for memberships.

THEMATIC GOALS

Increase visits, revenue, cultural relevance.

Objectives/Strategies:

1. Create exhibits that reflect community demographics and are engaging to the public.
2. Three-year plan: Paving the Way (I496 exhibit), Lansing and WWII, Durant, Curved Dash Olds, "Glory years of Oldsmobile".
3. Work on GM heritage (the plant, social, etc.).
4. Work on labor history.
5. Grants to help pay for exhibits.
6. Change "relational" space every year (as apposed to "foundational" exhibits which are not temporary).
7. Other aspirations: UAW-AFL (for Motor Wheel, which coincides with the 2027 anniversary of the Lansing Labor Holiday), 2024 is the 160th birthday of RE Olds, foster lecture series (with John Beck/Our Daily Work Our Daily Lives).



VISITOR EXPERIENCE GOALS

Increase visits, revenue, cultural relevance.

Objectives/Strategies:

1. Create self-guided tour.
2. Exhibit interactivity.
3. Advertise new content.
4. Engage community groups by reflecting their diversity in exhibits.
5. Create program for docents.



VISITOR GOALS

Increase visitors.

General Objectives/Strategies:

1. Signature events.
2. Advertising/marketing/social media: Create online exhibits, publicize events and new exhibits. Create a communications plan.
3. Partnerships (civic orgs, business orgs, youth groups, church groups).
4. Educational organizations.
5. Other historical organizations.

Specific Visitor Goal 1: Accessibility:

- Website evaluation.
- "405" committee to review accessibility (year one), implementation of priorities by year three.
- Better/more strategically placed seating.
- Gather data on visitor experience. Find a volunteer to do this.

Specific Visitor Goal 2: Creating a better learning experience:

- Docent program.
- Self-guided tour handout/takeaway.
- Interactivity: Lots of ideas discussed, one already started (having to do with the CDO).
- Have a master interpretive plan (within three years).
- Create exhibits from museum collections to tell stories of interest. Tell stories of diverse content. Tell stories of lesser-known (but should be known) content.
- Online catalog for Archives: Create subcommittee to determine efficacy of an online/public facing catalog. To be considered: Space, Growth, Sustainability of physical archival collection.

Specific Visitor Goal 3: Return visitors

- Calendar of events.
- Programming (many ideas discussed, see Thematic Goals).

VOLUNTEER GOALS

Increase utilization of volunteers. Satisfy expectations and value.

General Objectives/Strategies:

1. Archives: See specific Visitor Goal #2. Make a collection development policy that works for the archives as well as the museum at large.
2. Cars: File for every vehicle and its mechanical history (which is ongoing and being done).
3. Facilities: Ongoing file for maintenance of buildings. Immediate need for conference room windows. Possibility of shed for tools, which could expand museum's interpretive footprint.
4. Docents: Establish docent program, work on guide for "stations," work toward a pool of 6-8 docents. Be conscious of demographics of docents.
5. Fund raising/grant writing: Advertise for a volunteer.
6. All volunteers:
 - Needed is a volunteer for technical issues.
 - Make master schedule for volunteers.
 - Develop goals for volunteer coordinator.
 - Transparency of directions for museum.
 - Suggestion box.
 - Recruitment—Look to new networks to recruit.
 - Revamped recognition system.





KEEP 'EM FIRING

In the world over today the manufacture of cars (and trucks and buses) is changing in ways not imagined just 10 years ago and is in another period of "changeover." The RE Olds Transportation Museum is uniquely positioned to educate, promote, and preserve an automotive heritage that is critical to the understanding the Lansing region's economic, social, and scientific past, present, and future, and its importance to the country and world. All those who participated in this strategic planning process hope that this plan guides future decisions for the museum and helps make those decisions "strategic."

The plan is a road map, but pleasant (or unpleasant) diversions and detours can happen. While the Board of Trustees, the Executive Committee, and the Executive Director are committed to executing the plan, we also realize that change outside the immediate line of vision can happen (and probably will). The plan is based on current data and the next strategic plan should gather its own data to understand the effectiveness of these 2023 objectives and goals.

Castle Museum Strategic Plan 2018-2022

Strategic Focus 1: Growth

Goals:

1. Promote awareness of the Castle through marketing in order to attract tourism and make connections with key groups in the Saginaw Downtown area.
2. Membership increase.
3. Visitors increase.
4. Foster goodwill in the community.

Strategic Focus 2: Internal Employee Focus

Goals:

1. Employ committed associates who have high interest in the area of their assignment and are willing to gain expertise and skills through professional development.
2. Recruit volunteers with appropriate skills to accomplish desired tasks.

Strategic Focus 3: Preservation and Presentation

Goals:

1. Improve and maintain our facilities through responsible and forward-thinking projects.
2. Collections management.
3. Present exhibits to accomplish the mission of the HSSC.

Strategic Focus 4: Funding

Goals:

1. Secure millage at the appropriate level to ensure continued operations.
2. Attract non-millage funding.
3. Practice sound financial procedures.

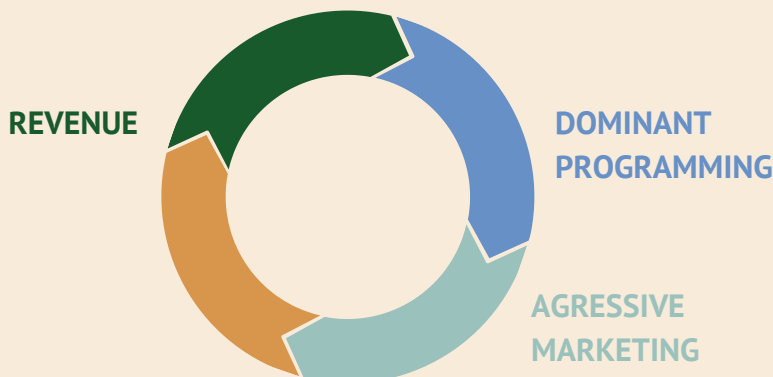
Tri-Cities Historical Museum

creating connections
to Tri-Cities history



OVERVIEW

In 2022, TCHM was selected from a pool of hundreds of West Michigan arts organizations and began intensive work in the two-year *Capacity Building: Michigan Lakeshore* program through the DeVos Arts Management Institute. This capacity building has engaged **all staff and Board members** in the development of a **5-Year Artistic Plan** covering mission focus, artistic and programmatic planning, marketing, and financial planning. This year, TCHM is committing to **nine key objectives** along the path toward becoming a **magnetic destination** for history exploration and a **regional leader** in education and community programming.



TRI-CITIES HISTORICAL
MUSEUM
EST. 1959

Strategic Plan

2024-2028

| strategic vision



5-Year Artistic Plan

The Tri-Cities Historical Museum will become a magnetic destination for locals and visitors to ignite their curiosity by exploring the rich history of North Ottawa County | Through the development of a series of high-profile themed exhibitions and programs, TCHM will capture the public imagination | To bring history to life, TCHM will become a regional leader in the design of outstanding educational programming | Its learning and engagement programs will frequently animate the Museum with experiences that define it as a welcoming and enriching hub for young and lifelong learners | CARC will become a full-fledged interactive research center for locals to uncover their genealogy and historians to study the region | These programmatic enhancements will create an adaptive and interactive Museum whose relevance and impact is continually demonstrated | This vitality will be conveyed through a compelling institutional marketing narrative | The Museum will assert thought leadership by collaborating with its regional and national peers, to contribute to the development of new models for education and museum management | By strengthening this identity, the Museum will shift from an asset that is appreciated to one that is seen as essential | This perceptual shift and expanded service will expand and diversify the Museum's family of supporters and lessen its dependency on millage funding | By enhancing its programming and asserting its relevance the Museum can attract a wider family of supporters and strengthen its position as a leading local history museum in Michigan

| impact

Erica Layton
Executive Director



It's clear to me that motivating people around a common goal is the key to success. Each day, our team is building a culture of excellence, curiosity, and excitement about local history. This **5-Year Artistic Plan** will **upshift** our momentum and bring our community together in a **renaissance** of local small-town history that will pack a punch with audiences for a lasting impact. The Museum staff, its Board, and its supporters are unified in this: serving our community by **connecting the Tri-Cities people, objects, and their stories.**

Since 1959, the Tri-Cities Historical Museum has served as a trusted repository of local history. We continue that mission today, **weaving together the threads of the past to create a rich, full tapestry of the history the Tri-Cities.**



| timeline

2024

Enhance education programs to become an invaluable partner to local area schools.

Engage in a meaningful Truth and Reconciliation process to fully update Museum content and practices.

Adopt a board "Charter of Expectations" that establishes clear standards for service and helps structure an annual review of member performance.

Launch an institutional marketing effort that articulates and promotes TCHM's leadership role in the preservation, interpretation, and dissemination of North Ottawa County history.

2025

2026

2027

2028



ES.,

EXHIBITS

EDUCATION

FACILITIES



OBJECTIVES

Exhibits and Education

TCHM has solidified its position as a cultural leader within the region, through programming that celebrates the diverse histories and perspectives of the communities that have resided and continue to reside there.

Facilities

TCHM has developed a robust plan that enables it to adequately steward its facilities.

Board and Staff

TCHM has built and sustained a Board of a size, composition, and generosity on par with its organizational ambitions.

TCHM has built a highly-skilled, engaged staffing unit that sustainably supports the organization's curatorial and administrative operations.

Development

TCHM has established an organization-wide culture of philanthropy in which all staff and family members understand and embrace their role in resource generation.

TCHM has diversified its contributed revenues through the development of a robust suite of targeted campaigns, annual campaigns, and special events.

Marketing

TCHM has developed a programmatic marketing effort that deepens relationships with current attendees and builds new patronage through assertive affinity marketing.

BOARD

DEVELOPMENT

MARKETING

STAFF

KEY STRATEGIES

Exhibits and Education

- Invest in vibrant and resonant Museum exhibitions.
- Judiciously plan a rotating schedule of use to fully activate all Museum spaces and maximize exhibition and programming capacity.
- Build and retain new audiences through a mix of innovative, aspirational programming; ongoing, “bread and butter” programming, and responsive, agile programming designed to remain relevant and timely in a quickly-changing environment.
- Engage in a meaningful Truth and Reconciliation process to fully update Museum content and practices.

Facilities

- Maintain a rolling 5-year inventory of upcoming facilities needs, to incorporate into the annual budget.
- Review and update existing facilities plans with the guidance of a facilities specialist.
- Complete the draft Master Facilities Plan.
- Using Master Facilities Plan as groundwork, conduct a capital campaign feasibility study.
- Hire a part-time facilities manager, which will increase to full-time if budget permits.

Board and Staff

- Enhance the financial performance of the Board.
- Strategically enhance Board composition.
- Maximize Board engagement and performance.
- Hire a marketing manager, focused on digital marketing and affinity marketing.
- Create a multiyear path to increase overall staff compensation.
- Engage a contract HR professional to review and strengthen policies and resources.





Development

- Aim to incentivize repeat attendance; build toward membership; find out what defines a “core” patron and attempt to convert more lapsed and inclined to core.
- Build and maintain an organization-wide Culture of Philanthropy.
- Leverage special events to introduce new prospects to the organization, drive short-term revenues, and buoy the annual fundraising program.
- Deepen understanding of the current TCHM audience, with a data-driven effort to profile and respond to patron preferences with segmented communications.
- Initiate an institutional fundraising effort focused TCHM’s commitment to education and civic impact.
- Design annual campaign efforts for Entry, Mid-Level, and Major Donors and Prospects.



Marketing

- Engage the TCHM audience with a vibrant content strategy and exemplary end-to-end user experience.
- Establish a codified annual marketing plan to unify messaging and coordinate content across channels.
- Develop a Change Narrative to support continuity of the marketing message throughout the year.
- Launch an institutional marketing effort that articulates and promotes TCHM’s leadership role in the preservation, interpretation, and dissemination of North Ottawa County region history.



Join us on
our
continuing
journey...

...visit
...research
...join
...give
...volunteer
...connect

TRI-CITIES HISTORICAL
MUSEUM
EST. 1959



Thank you to our visitors, millage communities, our donors and partners, and our dedicated volunteers.

Tri-Cities Historical Museum

200 Washington Avenue | Grand Haven | MI | 49417
connectingtohistory@tchmuseum.org | (616) 842-0700

Community Archive and Research Center

14110 172nd Avenue | Grand Haven | MI | 49417
collections@tchmuseum.org | (616) 842-0700



Lowell Area Historical Museum Strategic Plan 2021-2025



Process

The Lowell Area Historical Museum is dedicated to preserving and presenting the history of the Lowell area. The Museum is widely recognized for its exhibits, public engagement, education programs, community involvement and professional management of history. The Board of Directors and staff of the LAHM entered a period of reflection and planning to set out a plan for the next five years of Museum management and development that included internal and external surveys. The following report outlines the goals that surfaced through this planning process.

Participants

Participants in the planning of the Lowell Area Historical Museum's 2021-2025 Strategic Plan included Board members: Ardis Barber, Carolyn Jane Blough, Bev Anderson, Tina Cadwallader, Tony Dommer, James Doyle, Cathy Haefner, Dale Kropf, Don Leeman, Becky Reagan, Nancy Roth; and staff members: Shantell Ford, Luanne Kaeb and Lisa Plank. In addition a public survey was conducted to gain insight from volunteers, community stakeholders and the general public.



Mission: To enrich, delight and inspire our community and its visitors through the preservation and presentation of Lowell area history

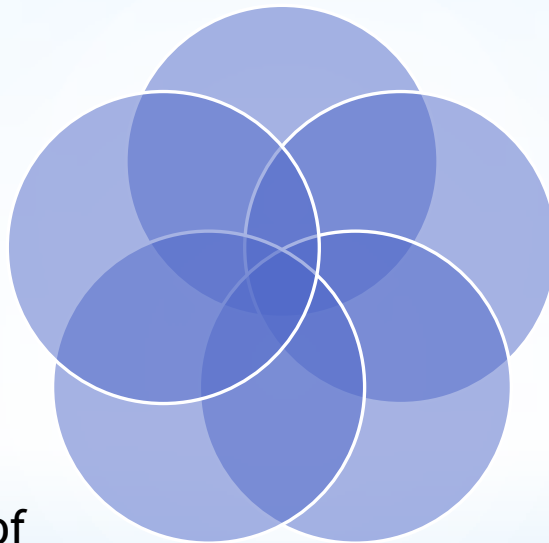
**Engage the
Public in
Meaningful Ways**

**Maintain a
Strong
Education
Program**

**Strong
Stewardship of
Museum
Collections**

**Foster Long
term health of
Museum**

**Foster
Collaboration
with Museum
Communities**



Goal 1

Engage the Public in Meaningful Ways

- Develop exhibits that explore a wide variety of topics and times in Lowell History
 - Historic District Store signs
 - Storefront displays
 - Township Park signs
 - Vergennes Trail signs
 - Explore diversity more deeply
- Provide Public Programs that engage
- Connect to audiences in new ways
 - Downtown tours
- Increase public awareness of and involvement in Museum mission and programs

Technology

- Utilize technology to present and share history
- Continue to use website, Facebook, email and other social media
- Develop Collective Access to its potential



Goal 2

Maintain a strong education program

- Continue and support current programs through staff and volunteer educators
- Explore new programs, resources to reach a variety of grades
- Foster programs that encourage youth involvement with the Museum
 - Foreign Exchange student event
 - School/Family nights



Goal 3 Strong Stewardship of Museum Collections

- Continue best practices for managing collection
- Maximize storage space
- Explore the need for off site storage
- Continue to foster oral history program



Goal 4

Foster long term health of Museum

- Diversified and strong funding
- Seek out and apply for a diverse range of grants
- Develop Summerfest fundraiser to its potential making it a signature event
- Develop corporate sponsors for events and exhibits
- Explore, develop and nurture a planned giving program
- Continue to evaluate staffing and develop a plan for future needs
- Physically maximize storage
- Maintain exterior of building in historically accurate manner
- Explore the need and possibilities for future growth of off-site space for storage and public programs and what that would mean for the current storage/office areas
- Grow and strengthen volunteer programs
 - Develop volunteer appreciation/enrichment
 - Develop volunteer jobs offering flexibility and leadership



Goal 5

Foster collaboration with the Museum's communities

- Collaborate and engage with local organizations and businesses to promote awareness of Lowell area history
- Continue to emerge as a regional model and mentor for other small museums including Fallasburg Historical Society, members of the Tri-Rivers Museum Network and the larger museum community
- Foster relationships with the larger Museum professional community
- Work with the City and Townships to promote historical awareness in the larger community



**Shaping
the Future**

Strategic Plan 2019/2023

GENEVA HISTORY MUSEUM



SUMMARY

The Geneva History Museum is determined to increase community support and to thrive in the future. A critical first step was the development of a strategic plan that took into account the strengths, weaknesses, opportunities, and threats facing GHM. The plan includes three strategic issues with accompanying goals to be accomplished over a five to ten-year period. This plan is a path to transform the organization into a sustainable educational institution, collaborating with other like-minded entities and reaching people all over the world through integrated technologies.



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Strategic Planning Process

In December of 2017, the Board of Directors and Director of GHM engaged Executive Service Corps of Chicago (ESC) to assist in the development of a Strategic Plan.

This plan is a template for action, to unify the organization and align it for progress toward the goals spelled out herein for the next five to ten years. At the time this Plan was approved by the Board, the Board and staff reached clear understandings about the approval requirements relating to the actions and expenditures contemplated by or implied in the Plan. Plan progress is reviewed periodically at Board meetings, and

expenditures will be approved through the budget process.

The Strategic Planning Steering Committee consisted of: Glorianne Campbell-President of the GHM Board of Directors, Eleanor Hamilton-First-Vice President, Terry Emma-Executive Director, Gayle Meers-Museum Technician, and Jessica Strube-Museum Curator. The entire Board and all staff members participated in an all-day strategic planning retreat in April of 2018 and the work groups tasked with developing the goals and action plans that address each of the identified strategic issues. Early on in the process, all the Board and staff, along with approximately 20 other donors and key stakeholders were interviewed to assist in identifying the strategic issues. GHM is grateful to all who contributed to the success of this project.

Organizational Culture

Mission

The mission of the Geneva History Museum is to preserve and share Geneva's evolving story while inspiring and engaging the community.

We will accomplish this by...

Collecting: Acquiring material on Geneva's history in all forms from past to present.

Preserving: Caring for the artifacts in our collection for present and future generations.

Researching: Sharing our unique resources with researchers across the world.

Educating: Inspiring and engaging visitors through programs and exhibitions.

Vision

Our vision is to be an accredited, sustainable Museum, connecting globally as the premiere source of Geneva's history.



Core Values

Stewardship - We are committed to providing the highest level of care for objects the Museum holds in perpetuity.

Authenticity - We provide links to history through well documented collections, accurate interpretation and reliable scholarship.

Ingenuity - We apply limited resources in innovative ways to maximize the effectiveness of our programs and the efficiency of our operations.

Engagement - We invite community involvement in our exhibits, programs and collection development, and build partnerships with organizations and individuals.

Our Story

In 1943, dedicated citizens formed the Geneva Historical Society to preserve local history and educate the community. Artifacts were cataloged and stored in private residences and exhibited in storefronts. A Museum Committee was formed in 1961 to raise funds for a building. After years of searching existing buildings, they made a deal with the park district and city to build the first Geneva History Museum in Wheeler Park. This building was expanded twice, in 1972 and in 1990.

As newcomers began to outnumber longtime residents, the Historical Society recognized the need for flexible space and a more central location. In 2004, the organization, renamed the Geneva History Center, conducted a successful capital campaign to purchase a two-story building in the heart of Geneva's historic district. The building was renovated to create two exhibition galleries, storage areas for collections and archives, a research room, a meeting room and offices. The organization has always operated on voluntary donations and does not receive public funds.

In 2013, while participating in the Museum Assessment Program, it was rediscovered that the word Museum best represents the activities and services of the organization. In June 2014, the name became the Geneva History Museum, operated by the Geneva Historical Society.

The Museum celebrated 10 years in this building in August 2014 with a grand reopening of the redesigned Main

Gallery, "Geneva's Story," our permanent exhibition. Group Programs and Geneva on Wheels tours by van, trolley and bicycle were also developed to bring the Museum out into the community.

In 2014 the Museum started the Standards of Excellence Program for History Organizations (StEPs) offered by the American Association for State and Local History which provides benchmarks against nationally recognized standards.

With a goal of national accreditation, the Museum began reviewing and revising its core documents for the American Alliance of Museums in 2015 and continues to make improvements to meet Best Practices. In 2017, the Museum was awarded a Collections Assessment for Preservation grant from the Foundation of the American Institute for Conservation which provided a site visit by a conservationist and an architect who created a prioritized list of goals to improve the facility.

In 2017, the Museum was voted one of the "Best Museums in the Suburbs" by *The Daily Herald* and one of the "Best of the West" area Museums by *West Suburban Living Magazine*.

After completing all of the five StEPs, the American Association for State and Local History chose the Geneva History Museum as their national StEPs Spotlight in 2018 as an example of how StEPs is helping organizations take a leap forward by improving policies and practices, opening lines of communication and setting goals for a bright future.

Strategic Plan 2019/2023

Key Strategic Initiatives

Accreditation

The American Alliance of Museums describes the benefits of accreditation as “the museum field’s highest mark of distinction, and indicated that a museum is operating at the highest professional level, admirably caring for collections and having a significant and measurable impact on the community.” The Geneva History Museum (GHM) staff and Board of Directors understand the significance of accreditation, but this needs to be better communicated to the community and other stakeholders to gain their support of the endeavor.

Goal 1

Communicate to stakeholders by January 2019 regarding the value of being an American Alliance of Museums accredited history museum.

Geneva History Museum (GHM) needs to better identify and communicate the benefits that accreditation will bring to the community and obtain the support of all significant stakeholders.

Objectives

- Identify, prioritize and create materials to communicate to stakeholders by end

of 2019 regarding the value of being an AAM Accredited History Museum.

- Create a timeline for meeting with stakeholders and schedule presentations to community organizations before January 2020.

Goal 2

Become an accredited history museum through the AAM by year-end 2023

The GHM staff and Board of Directors have been working towards becoming an accredited history museum through the AAM since 2014. At that time, the Museum began reviewing and revising the five mandatory core documents required by AAM as part of the accreditation process. To date, the Mission/Vision and Code of Ethics have been approved. The Collections Policy was submitted and returned by AAM for revision. This document will be submitted upon Board approval.

Objectives

- Staff will work on revisions to Collections Policy and resubmit to AAM by January 2019.
- Members of Board of Directors will work with staff on completion of Emergency/Disaster Plan to submit to AAM by January 2020.
- GHM aims to have all five documents approved by AAM and to submit the completed pre-accreditation self-study to AAM by January 2021, with accreditation granted by July 2023.

Finance/Fundraising/ Building & Grounds

The Geneva History Museum will thrive with financial stability. A rigorous process for creating, monitoring, and evaluating both short term (monthly/annual) and long term (3-5 year) financial plans will improve budget forecasts and provide more realistic outlooks for addressing potential shortfalls via fundraising. These financial plans will include capital needs for the Museum building and grounds, as well as increasing staff to deliver this strategic plan.

Goal 1

Achieve financial sustainability by 2023.

Financial sustainability is one of GHM's keys to success.

Objectives

- Board of Directors will develop and approve a five-year Budget forecast by January 2021.
- A sub-committee of the Board Development Committee will create a fundraising strategy to increase annual donor contributions by 10% by July 2022 to reach an adequate level of financial support as an interim step.
- The Board of Directors and sub-committee of the Board Development Committee will concentrate on

increasing the balance of investments to \$6-million by July 2023. At this level, the investments will generate enough interest income to provide financial sustainability for GHM during the 2024-2029 strategic period.

Goal 2

Increase Museum staff and compensation packages by 2023.

The current GHM staff of two full-time and three part-time people are able to do an amazing amount of work. Financial plans should include any additional staffing resources to grow and deliver this strategic plan.

Objectives

- Executive Committee will review, document and propose a staffing plan that increases hours, updates compensation packages and includes job descriptions by January 2021.
- The July 2022 GHM operation budget will include increase in compensation and additional staff.
- The Board of Directors will hire the recommended additional staff by July 2023.

Goal 3

Develop long-term facilities and technology plans by 2023

Thanks to community support, a Capital Campaign provided GHM the ability to

own and renovate the building; however this comes with responsibilities of ownership. To continue to be good stewards of the structure that houses the Museum's collections, the building needs to be maintained. These financial plans should include capital needs for building & grounds to deliver this strategic plan. Technological advances are also required to provide better communication, increase data storage capabilities and to secure the environment at the Museum.

Objectives

- The Buildings and Grounds Committee, with staff assistance will revise a long-term facilities maintenance plan by January 2019.
- An ad-hoc committee from the Board of Directors will create a long-term technology plan by July 2019.
- The Collections Committee will seek outside services to create a Collections

& Archives Redesign Plan and include in Strategic Plan to be developed in 2023.

Board Development

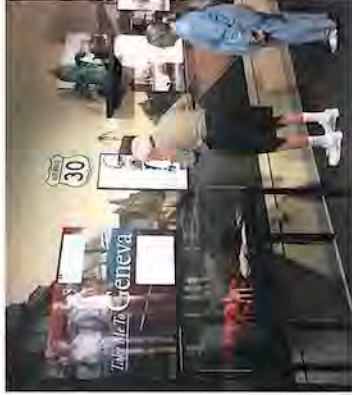
Geneva History Museum needs to focus on intentional Board recruiting of targeted skill sets currently missing from the Board as well as re-invigorating the committee structure and implementing best practices in Board goal setting and self-evaluation. Clarification of the roles and responsibilities of Board and Staff and an understanding of the communication channels between Board and Staff are critical to the implementation of the strategic plan.

Goal 1

Develop and implement a GHM Board of Directors training program by February 2020.

Formally introducing new GHM Board Members to their roles and responsibilities, and reiterating the same to current members will facilitate the success of the organization.

- Research and document the Board of Directors training program other museums use for their board members.
- Tailor Board training program to GHM needs.
- Implement training program with current GHM Board Members by July 2020.



- Review committee structure of GHM Board of Directors based on implementation of strategic plan by July 23.

Goal 3

Develop a succession plan for GHM Executive Director position by February 2020.

Having a succession plan in place for the Executive Director position is critical for the seamless operation of GHM during a transition period.

- Executive Board will research and document succession plan best practices for Executive Director position.
- Tailor and implement Executive Director succession plan best practices to meet GHM needs by July 2022.



Goal 2

Develop and implement a recruitment and succession program for GHM Board of Directors by February 2020.

GHM currently has 14 seated directors on its Board. A maximum of 17 members is allowed according to GHM by-laws. Future recruitment will focus on gaining targeted skill sets currently missing from the Board. Deficiencies will be determined by the Executive Board by surveying current members and documenting their findings.

- Research and document skills needed for GHM Board of Directors.
- Tailor Board recruitment program to GHM needs by January 2020.
- Seek new GHM Board Members based on recruitment needs.
- Develop a succession plan for GHM Board positions and committee chairpersons by July 2021.



Strategic Plan 2024

Wayland Museum/Wayland, MA

Summary

The Wayland Museum & Historical Society (WM&HS) at the Grout-Heard House Museum (GHHM) has been an integral part of the Wayland community and central to documenting and honoring Wayland's history for the past 70 years. The aim of the following Five-Year Strategic Plan is to outline the mechanisms through which the Society can grow and become an even more active and vibrant community resource. Key to our growth and increased community engagement will be expanded programming and educational opportunities; enhancement of the GHHM, its infrastructure and collections; participation by a committed Board and cadre of volunteers supported by dedicated and knowledgeable staff; and financial support from members and donors.

Mission

The Wayland Museum and Historical Society is dedicated to preserving, interpreting and sharing the history of the Town of Wayland. The Society:

- owns, preserves and opens to the public the Grout-Heard House Museum.
- holds meetings, creates exhibits, sponsors programs and runs special events for the education and enjoyment of its members, the Wayland community, and the general public.
- collects, preserves and interprets objects and records relating to the rich history of Wayland and its people.
- makes its resources accessible to researchers, genealogists, and the general public.
- acts in cooperation with public and private entities to promote awareness of and interest in

Wayland's history and heritage.

Vision

The Vision of the Wayland Museum & Historical Society is to engage residents and visitors by offering an understanding and appreciation of Wayland's rich history and its connection to historical themes of the region, Commonwealth and country.

Values

We believe that preserving the history of the Community in a respectful and responsible manner is our obligation and that this history should be accessible to all those interested in knowing about the Community. We commit to being the stewards of that history for future generations. We will work to expand our horizons to learn about all cultures that make up Wayland's past, present, and future.

Goals/Priorities/Outcomes

The main goal of the WM&HS is to create a more vibrant and active organization at the center of Wayland. We will:

- increase visibility and community awareness of the Wayland Museum & Historical Society;
- create programs and events that speak to and engage all people who make up the Wayland community;
- generate community support through expanded membership and attendance of programs;
- be stewards of the history of Wayland for all members of the community;
- and fully meet our stewardship obligations to the historic Grout-Heard House Museum and its Collection.

Enhancement and Expansion of Programs

Increasing our membership as well as relevance to and engagement with the community depends on offering engaging programs and educational opportunities. The Wayland Museum & Historical Society programs will appeal to multi-generational audiences and heighten awareness of the Society and its resources in Wayland and the broader community. Specifically, we will:

- expand and revitalize the program committee to enable WM&HS to offer multiple engaging programs annually that appeal to multi-generational audiences.
- develop and re-establish connections with the Wayland Elementary and High Schools and Girl/Boy Scouts to sponsor youth educational programs:
- renew the Third-Grade Revolutionary Program to be offered to all three elementary schools every year starting in Spring 2025
- renew the High School History Program to be offered every year by 2026
- identify a program that will bring Boy Scouts to the GHHM by 2026
- continue to offer a program related to the Girl Scout *Playing the Past* Badge
- develop youth summer programs to be offered by Summer 2026.
- develop multi-generational programs focused on 250th anniversary to be offered throughout 2026.

Museum and Collections Enhancement

The Grout-Heard House Museum currently exhibits period rooms that are the same, month to month. Many visitors come to see the artifacts in the museum and find that one visit is sufficient. The Wayland Museum & Historical Society will preserve the fabric of the GHHM, organize its collection, restructure museum exhibitions and presentations, and increase the accessibility of the collections and archives to enhance awareness of WM&HS resources and attract the public to make repeat visits to the GHHM. Specifically, we will:

- continue efforts to preserve the GHHM and its collections by
- replacing the existing HVAC with a heat pump system by July 2024
- raising funds to plan and construct ADA compliant entry and bathroom facilities
- expanding museum hours with some weekend access (one weekend afternoon per month).
- develop and implement a repeat visit strategy and plan by 2026. Ideas already discussed include
- rotating special exhibits at the GHHM
- loaning artifacts to the Library and other public spaces such as the Community Center when built
- reorganizing the period rooms at the GHHM.
- improve access to collections information and archival files by
- expanding PastPerfect data entry to other computers at the GHHM
- making the collections database accessible to wide audience by purchasing online access to PastPerfect
- reviewing and filing archival materials in file cabinets
- posting photographs on WM&HS website.

Community Awareness

Even though the GHHM is in the center of Wayland, many residents do not know about it or recognize its importance in the community. The Wayland Museum & Historical Society and the GHHM will be better known throughout Wayland and the larger community. Specifically, we will:

- have a presence at relevant town events: e.g. Memorial Day, Veterans Day, Town Meeting – 250th Celebration.
- define other resources in town with which to link: e.g. the Rail Trail, annual Multicultural Festival.
- partner with Historical Societies in surrounding towns – learn approaches from other societies, particularly Sudbury for the 250th Celebration.
- update signs; one in front of the GHHM; one along the Rail-Trail.
- upgrade newsletter content and improve access to and awareness of the website.

Membership and Donations

Members not only provide funding for programs and other activities but also are the source of new ideas and committed volunteers. One hundred fifty-nine (159) members in a town of almost 14,000 (5,000 families) is not enough. The Wayland Museum & Historical Society will significantly increase membership and donations from the community. Specifically, we will

- engage in a major membership campaign in Fall 2024 and 2025 to increase membership number by 20 percent each year for the next five years (30 new memberships in 2024-2025, 36 new memberships in 2025-2026, 43 new memberships in 2026-2027, etc.).
- identify potential new members at each program offered and follow up with a membership solicitation.

Capital Campaign

The Board and the Executive Director will develop a Capital Campaign strategy to secure the future of the Historical Society and to accomplish many of the tasks inherent in this Plan.

Board, Volunteer and Staff Participation

All successful non-profit organizations require a committed board, responsible officers, and volunteers – all with help of a committed staff. The Board of Managers includes five officers and six directors. The Trustee of Funds, which manages the Endowment, includes three trustees and the treasurer who also is an officer. The Historical Society has one part-time employee, the Curator. Volunteers range from those who work on a specific project weekly to those who step in for individual projects, logging in 1,076 volunteer hours in the last Fiscal Year. To help build the depth and breadth of the Board and volunteers, as well as to help implement the goals discussed above, we will:

- hire a full time Executive Director to start in Fall 2024.
- identify Volunteers to run committees that help with the work and output of the organization.
- identify Volunteers to organize specific programs.

THE
JOHN WESLEY POWELL RIVER HISTORY MUSEUM

STRATEGIC PLAN



Contents

3 - Mission & Vision

4 - Core Values

5 - Executive Summary

6 - Organization History

8 - Process & Looking Ahead

9 - How Things Stack Up

10 - Strategic Goals

MISSION

Celebrating the significance of river history through the cultures and landscapes of the Colorado Plateau.

VISION

Ethical stewardship of the rivers, landscapes, and cultures on the Colorado Plateau.

CORE VALUES

MISSION FOCUS

We value the mission of the organization over individual accolades.

PROFESSIONALISM

We support an environment that leads to success for our employees, including professional development, career growth, and financial stability. We are committed to self-improvement.

INNOVATIVE

We are a unique museum with a unique mission. We value creativity, forward thinking ideas that challenge the field and lead to better stewardship, education, and a willingness to grow.

INCLUSIVE

We understand our role as a community asset and we strive to be experts in our field. We value accessibility, public input, and access to diverse educational opportunities and cultural experiences.

FUN

We are a welcoming institution that reflects the culture of the river running community that we serve.

Executive Summary

In early 2015, the John Wesley Powell River History Museum embarked on a comprehensive strategic planning process that marked the first in the organization's history. A steering committee made up of experts in the field, museum and city staff, and local stakeholders helped guide the creation of a long-term strategic plan that was completed and approved by the Green River city council in the summer of 2015.

The document was intended to provide systematic guidance during a period of transition and growth for the museum. In many ways, it was a big success – it provided clear direction and action plans for major changes that were in the best interest of the organization. The plan represented the voice of many stakeholders, and carried the approval of both governing bodies who had been tasked to oversee the health of the museum. It was the first functional plan the organization had seen in more than two decades, and represented a turning point in the management of the organization.

Through the first four years of guidance, the plan helped the museum achieve significant strategic priorities that have strengthened the organization and built a foundation for the sustainability of the museum for years to come. Areas of improvement included formal documents that clarified the roles and relationships of the museum, city, non-profit organization, and ownership of the museum's collection. The museum created a collection policy, developed professional staff, created a funding plan, and balanced its budget – all of which were laid out as priorities in the strategic plan.

Nearing the end of 2018, museum staff sensed a need for a new round of planning. After several years of successful guidance, it was time to restructure the museum's core guiding document so that it better matched the needs and pliability of the organization. The following is an effort to do just that.

This document offers a more broad and visionary direction for the future of the organization without getting lost in the details of the day to day, or week to week needs of departments or staff. It is an effort to look at the future of the museum from thirty thousand feet rather than ground level. Using core values and visionary goals as touch points, this updated strategic plan offers flexibility in implementation and lofty guidance.



Boat Room of the John Wesley Powell River History Museum



John Wesley Powell
Popular Science

Organization History

In September of 1988 several state, county, and city politicians gathered at the future site of the John Wesley Powell River History Museum. Together, with a small crowd of local community members, they held a groundbreaking ceremony for the construction of what was designed to be a nationally relevant and culturally significant historical museum. At the ceremony, Green River's mayor gave an impassioned speech on the city's expectations for the new building, local community members performed the national anthem, and the event featured a melon bust to coronate the construction of what everyone hoped would be an economic boon to the local economy. The museum was an enormous undertaking, something that the community had been working towards for quite some time, and it was finally coming to fruition.



Artist's rendering of museum

As early as 1987, members of the Green River community began reaching out to museum professionals, business owners, and politicians throughout Utah in an effort to gather information and support for the construction of a new museum facility that would highlight the historical and cultural significance of the Green and Colorado Rivers on the communities of southeastern Utah. Support came from senators, congressmen, local business owners, and even Robert Redford (a letter that must have caused quite a stir on the day that it showed up in the office!)

The grounds for the museum were donated by Betsy Hatt "in memory of Vail Hatt and his commitment to the betterment of the community and tourism." By 1988, the city of Green River had been approved for funding to begin construction on a twenty-three thousand square foot museum facility with an expected cost of approximately \$1.5 million dollars to construct. Owned and operated by the city, the John Wesley Powell River History Museum opened its doors in 1990 and has strived to achieve the early vision of its founding group ever since.

Understanding a need for support outside of the City of Green River, a group of organizers created the John Wesley Powell River History Museum, Inc. in 2008 to further promote the mission of the museum. A 501(c)(3) non-profit organization, the museum corporation partnered with the city of Green River and originated the public-private partnership that exists between the museum and the city today. This partnership led to the hiring of the museum's first full-time executive director, a commitment to strategic planning, and a renewed effort across the organization to reach new levels of professionalization.

In 2015, the museum reaffirmed its commitment to the river running community through its annual River Runners Hall of Fame induction ceremony and made a renewed commitment to the community of Green River to offer regular programs, local exhibitions, and a commitment to preserving the history of the region.

**"Keep history alive,
especially for
younger folks."**

-Survey response



Process

Museum staff engaged stakeholders, board members, and visitors through dedicated planning conversations, invitations for feedback, and brainstorming sessions to gather broad input on the long-term goals and core values of the museum.

Being the most informed on the needs of the organization, museum staff held planning meetings to create consensus on major goals and core values. Staff considered successes and failures from the previous strategic plan, the current trends of the organization, fiscal realities, and feedback gathered from visitors over the course of several years. Staff also solicited feedback from stakeholders through digital outreach, and surveys that were gathered as part of our original plan.

The museum governing board provided input on the work that had been developed by staff, and offered direction on the strategic goals and mission of the organization. The board was then given a draft copy of the current strategic plan and members were asked to provide input and feedback before the plan was finalized and voted on. Following board approval, the strategic plan was then presented to the Green River City Council for input and final approval.

Survey question -

Overall, how satisfied are you with the professionalism of our museum?



Of those surveyed, no one responded to this question with anything less than four stars.

Looking Ahead

Using the following document as a guide, departmental staff will create annual action plans that coincide with the organization's mission, vision, core values, and long terms goals. Department plans will be approved by executive staff, and presented to the museum board and city council to ensure that the strategic vision of the organization is carried out.

The board will be tasked with reviewing the relevance and success of the strategic plan during their first meeting each year. Because the organization views the strategic plan as a living document, any necessary changes will be made to the plan at the direction of the board.

In an effort to maintain momentum and to ensure that all the relevant parties are well informed and agree on the direction of the museum, the organization has committed to a review and renewal of the strategic planning process beginning in the winter of 2021.

How Things Stack Up

GOVERNING

The museum is an official city department and is funded primarily by gift shop sales, admissions, and the city of Green River general fund. The museum is owned by the city, and museum staff are employees of the city who are supervised by the Green River Mayor and City Council. A memorandum of understanding between the city and the John Wesley Powell River History Museum, Inc. has allowed for more stability in strategy while maintaining city ownership of the museum.

POPULATION

Green River is a small isolated community with limited access to many of the amenities that large cultural institutions rely on to be sustainable. Even under measured and sustained growth over the course of several years, this reality of our community will likely remain true. The isolated nature of our location will continue to be a factor in the programming, fundraising, visitation, and maintenance of our organization for the foreseeable future.

UNIQUE SPACE

Our museum stands among few in the West as a place that interprets and preserves river history on the Colorado Plateau. We strive to be the premier river history museum in the region. There are very few locations for historic boats and other artifacts relating to river history to be preserved. Our uniqueness will be a major opportunity for the advancement of the museum for the foreseeable future.

STAFF

We are a small staff with limited resources who aim to do remarkable things in service to the mission of the organization. The realities of limited staff time and resources are a factor, but not a deterrent to the success of the museum.

TOURISM

The vast majority of visitors that come to the museum are tourists that have traveled to Southeastern Utah to visit the natural resources of the region. The tourist community will continue to make up the majority of our visitorship for the foreseeable future.

STRATEGIC GOALS



STRATEGIC GOALS

1. Actively engage targeted communities and cultivate long lasting meaningful connections.

- Nurture a more connected community of river runners based around the energy of the Hall of Fame and the museum as a hub.
- Solicit visitor feedback and evaluate regularly to better anticipate visitor needs and to improve visitor experience.
- Maintain local partnerships and increase opportunities for access.



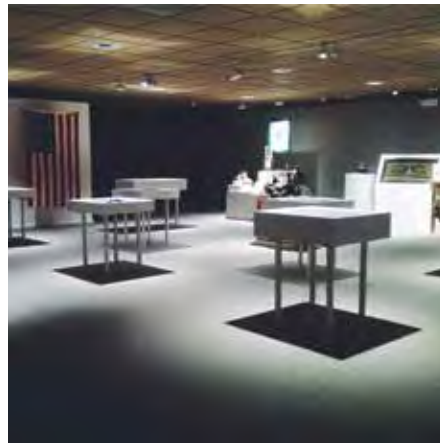
“Celebrate the river and all that it brings and has brought to us”

-Survey response

STRATEGIC GOALS

2. Produce high quality temporary exhibitions

- Streamline and professionalize our guest curator program for a more seamless process.
- Develop in-house process and and idea bank for small temporary exhibitions based on our collections.
- Market and advertise temporary exhibitions to build visitor expectations for quality rotating experiences.

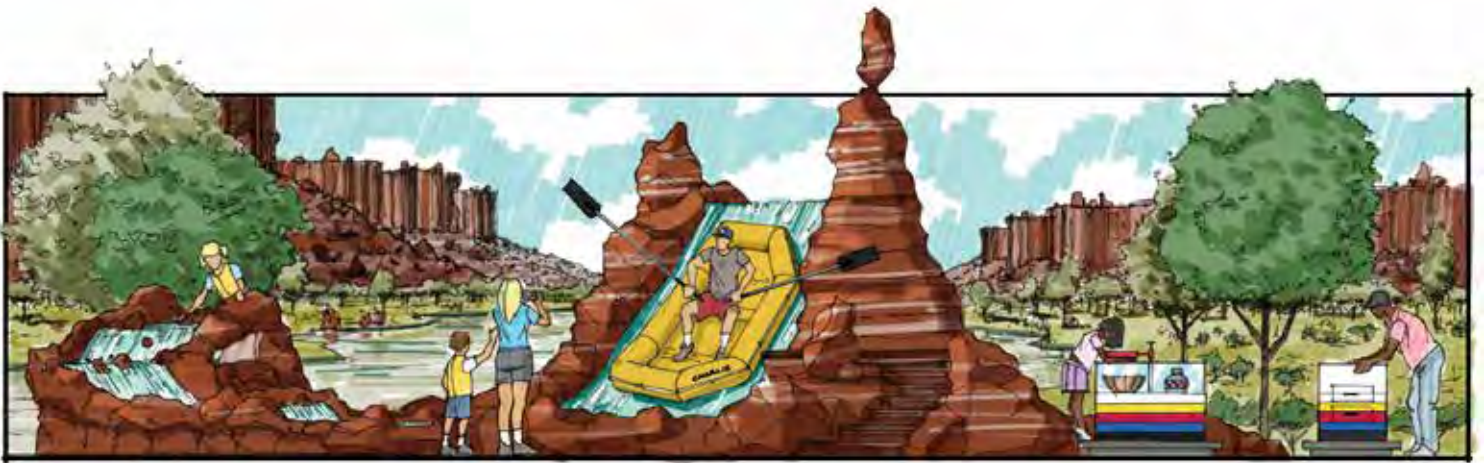


Of those surveyed, 58% cited "exhibitions" as one of the primary reasons for visiting the John Wesley Powell River History museum.

STRATEGIC GOALS

3. Develop and build new permanent exhibitions

- Use existing staff resources and expertise to get as far as possible without creating a financial burden.
- Create design book to be used as a guide for design, buildout, and fundraising.
- Communicate plan to create new exhibits to stakeholders, funders, visitors, and community.



Artist rendering of potential exhibits
Thanksgiving Point

Many respondents cited permanent exhibitions as the least satisfying aspect of the museum and suggested building new exhibits or making "room for more boats."

STRATEGIC GOALS

4. Professionalism in Collections Management

- Make progress in completing inventory, understanding what we have so we can better manage and make use of the collection
- Finish core documents that help protect the integrity of the collection
- Extend collections training to all staff for a more robust understanding of the museum's collection goals

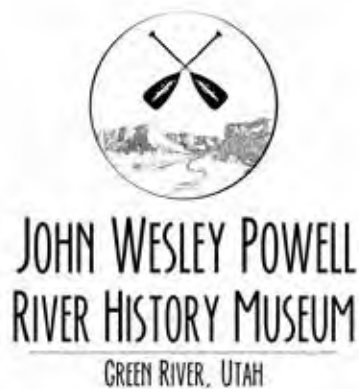


Survey respondents overwhelmingly cited museum collections as the most essential resource for the success of the museum.

STRATEGIC GOALS

5. Strengthen Brand and Visitor Experience

- Maintain website and ensure information is current through regular audits.
- Create marketing plan to improve signage and messaging.
- Take advantage of partnerships and existing infrastructure.



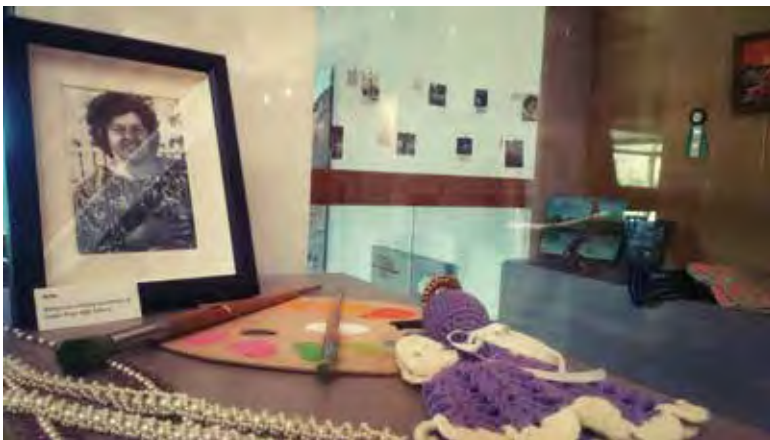
"Keep reaching out to special communities,
but include the general public as well."

-Survey response

STRATEGIC GOALS

6. Meaningful experiences for Green River residents

- Create and curate programs, events, and exhibitions that directly target and serve Green River residents.
- Establish our collection as a resource for residents.
- Leverage resources like outdoor space, theater, museum to be a more valued resource in the community.
- Mitigate loss of programs manager and continue to serve local students/residents first.



"I love the new "river walk" and outdoor stage. Keep the community involved - make it a gathering place. I love having this in Emery County!"

-Survey response

STRATEGIC GOALS

7. Facility improvements

- Create facilities plan that addresses strengths, weaknesses, and opportunities for improved facilities.
 - o Remodel outdoor bathrooms
 - o Develop working relationship with city maintenance team to ensure proper facilities care
 - o Elevator facelift
 - o Visitor center plan
- Mitigate collections needs with reality of facilities.
- Strategically address facility upgrades to improve visitor experience.

“Educate the public about the history or river running and exploration on the Colorado Plateau and the value of rivers as the lifeblood of the region.”

-Survey response

“Many historic boats need a home. The Emerald Mile is a prime example. Expand the basement to include more boats.”

-Survey response

John Wesley Powell River History Museum

1765 East Main Street
Green River, UT
84525



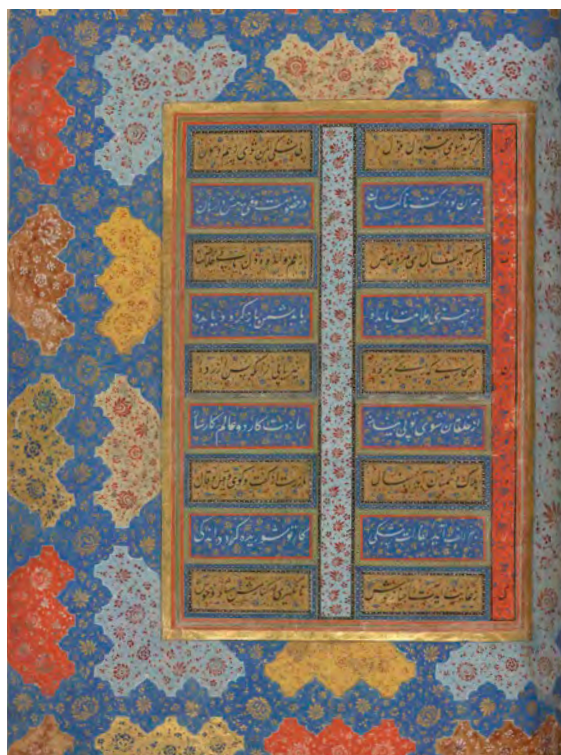


The
Morgan
Library &
Museum

STRATEGIC PLAN

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Director's Introduction

This year marks a century since the Morgan Library & Museum's founding in 1924. It is staggering to think of how much the world, New York City, and the Morgan have changed since then. Once the personal library of the financier J. Pierpont Morgan, today the Morgan welcomes over 250,000 visitors on-site and over 7 million online each year, shares a collection that spans antiquity to the present day, and stewards a 150,000-square-foot campus of great architectural significance.

At this milestone, we take time to reflect on our history for inspiration and guidance. We also look ahead with eagerness and ambition to all that the Morgan has to offer the public in the century to come.

I am pleased to present the Morgan's strategic plan for fiscal years 2025 through 2029. A result of much hard work and careful thinking, the plan builds on the institution's strengths and prepares us for the future. At the same time, it remains firmly grounded in our identity as a beloved museum and research library in the heart of New York City.



The plan is organized around five themes:

Collections, Exhibitions, and Scholarship—stewarding, studying, and sharing the extraordinary collections at the center of our institutional mission and identity.

Audience, Engagement, and Profile—deepening our commitment to engaging with and serving a diverse public from New York City and beyond.

Technological Capacity and Capabilities—strengthening and expanding the strategic use of technology to fulfill our mission.

Organization, Resources, and Facilities—building a vibrant and inclusive work culture, bolstering our financial future, and caring for our campus.

Governance—ensuring fidelity to and execution of the Morgan's mission and building the board of tomorrow.

There are several interwoven threads across the various sections of the plan: deepening the Morgan's commitment to scholarship, collection stewardship, access, and inclusion; building and diversifying the Morgan's audience; improving technological systems and using them to support organizational effectiveness; fostering the excellence of the Morgan's staff and governance; and ensuring the Morgan's financial and organizational sustainability.

Developed in collaboration with staff, volunteers, and trustees, this plan represents a significant effort of the entire organization over the past year. I am grateful to all for their many contributions and look forward to the important work ahead.

A handwritten signature in black ink that reads "Colin B. Bailey". The signature is written in a cursive, flowing style. Below the signature is a long, horizontal, slightly wavy line that serves as a decorative flourish or underline.

Colin B. Bailey
February 2024

Mission Statement

The Morgan Library & Museum celebrates and shares the history and process of human creativity from antiquity to the present day through the preservation, study, and interpretation of a dynamic and growing collection.

ABOUT THE MORGAN

A museum and independent research library located in the heart of New York City, the Morgan Library & Museum began as the personal library of financier, collector, and cultural benefactor J. Pierpont Morgan (1837–1913). The Morgan offers the public close encounters with great works of human accomplishment in a setting treasured for its intimate scale and historic significance. Its collections of manuscripts, rare books, music, drawings, and other works of art comprise a unique record of civilization, as well as an incomparable repository of ideas and the creative process.



Values

Our values express our aspirations for how the Morgan Library & Museum cares for the collection; advances scholarship, inquiry, and knowledge; engages audiences, partners, and the larger community; and collaborates internally as an organization.

Accessibility

Ensuring that our programs, collection, and campus are accessible to the widest possible audience. Welcoming all who visit, study, or work at the Morgan.

Authenticity

Affirming our history and capacity as a museum and research library. Fulfilling our founding purpose while evolving the narratives and perspectives included in the Morgan today and tomorrow.

Creativity

Approaching our work at the Morgan with curiosity. Engaging our visitors and audiences, exploring new ideas and approaches, and inspiring new scholarship and creative expression.

Diversity, Equity, and Inclusivity

Embracing diverse perspectives in all facets of the Morgan and its mission. Committing to the fair and just treatment of all members of our community.

Integrity

Holding ourselves accountable to our mission and values. Pursuing excellence as a museum and independent research library.

Stewardship

Preserving our collection and campus for future generations. Nurturing our relationships with audiences, constituencies, staff, and volunteers. Investing in our long-term financial sustainability.



Priorities and Objectives



I. COLLECTIONS, EXHIBITIONS, AND SCHOLARSHIP

The Morgan's extraordinary collections are at the heart of our institutional mission and identity. At present, the collections encompass over three hundred thousand objects in eight curatorial areas. We are well known for the excellence of our exhibitions, publications, and research, which make these collections accessible to diverse and growing audiences, and for maintaining rigorous standards in collection preservation and stewardship. Moreover, a renewed interest in institutional history has reinvigorated the Morgan Archives, as scholars and the public are increasingly interested in the collecting practices and legacies of J. Pierpont Morgan and Belle da Costa Greene. The plan focuses on commitments to preserve our work and reputation in this area while responding to a changing world and evolving professional standards in the field.

PRIORITIES AND OBJECTIVES

Steward and expand the Morgan's world-renowned collections.

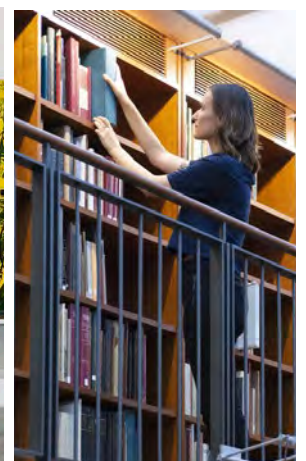
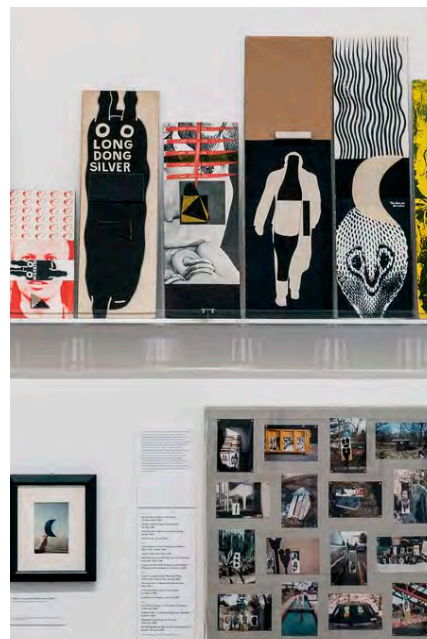
- * Expand the Morgan's network of collectors and donors to support the collection.
- * Invest in the stewardship and accessibility of the Morgan Archives.
- * Broaden our holdings of artists from under-represented groups.
- * Increase capacity for collection storage, handling, and management across the institution.

Maintain and expand the Morgan's scholarly impact and profile.

- * Increase staff research on and cataloguing of the Morgan's collections, as well as the dissemination of the resulting scholarship.
- * Expand the range and type of research fellowships at the Morgan.
- * Broaden awareness of scholarly work on the Morgan's collections.

Strengthen the Morgan's dynamic exhibition program by balancing it with other institutional priorities.

- * Refine exhibitions and loan strategy with organizational sustainability in mind.
- * Demonstrate the Morgan's commitment to diversity, equity, access, and inclusion through its exhibitions program.



II. AUDIENCE, ENGAGEMENT, AND PROFILE

Since its founding a century ago, the Morgan has been a place for inspiration and knowledge through engagement with remarkable examples of human creativity. Each year, we welcome over 250,000 visitors to our campus for exhibitions and programs and over 7 million visits to our website. Looking forward, we will deepen our commitment to the communities that we serve both on-site and online. We will expand our understanding of their needs and the many ways that we can better serve a diverse public in New York City and beyond. We will increase awareness of our varied offerings, making the Morgan an even more welcoming place for all.

PRIORITIES AND OBJECTIVES

Deepen our understanding of key audiences and integrate findings into our decision-making.

- ★ Conduct ongoing audience research.
- ★ Create mechanisms for visitor feedback relating to exhibitions, programs, and digital outreach.
- ★ Integrate findings from audience research and visitor feedback into decision-making and planning across the institution.

Expand and diversify on-site audiences while retaining the intimate quality of the visitor's experience.

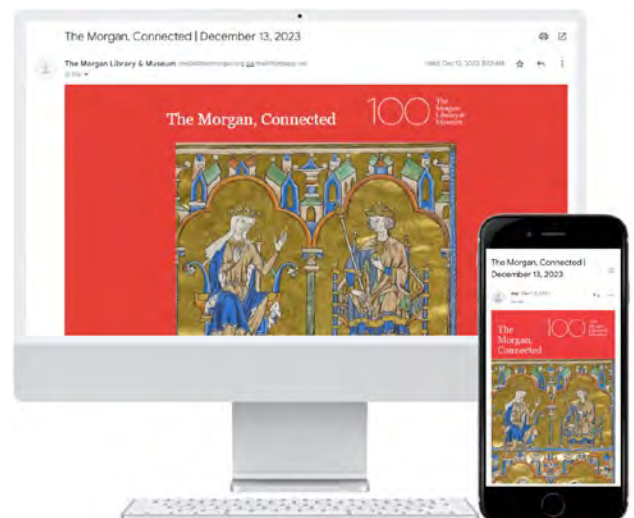
- ★ Create an audience development strategy to support the goal of three hundred thousand total annual visitors by 2028, with increased participation by younger audiences and visitors from diverse backgrounds.
- ★ Forge bonds with younger, more diverse audiences.
- ★ Expand opportunities for visitation and engagement.

Establish, broadcast, and embody a more inclusive identity.

- ★ Ensure everyone feels welcome at the Morgan.
- ★ Strengthen awareness of the range of the Morgan's offerings.

Articulate and implement a digital engagement strategy that encourages meaningful visitor participation on-site and online.

- ★ Strengthen internal collaboration to support the articulation of clear digital objectives and coordinated outreach.
- ★ Broadcast a distinctive and engaging Morgan identity across the website and other digital platforms.



III. TECHNOLOGICAL CAPACITY AND CAPABILITIES

The Morgan's use of technology and digital tools has evolved significantly over the past decade, as has the creation and management of digital assets in our collections, scholarship, and institutional work. Also changing are the expectations and needs of our audience (including visitors, researchers, and collectors) and staff in terms of digital access, communication, and engagement. In this context, we have an opportunity to strengthen and expand the strategic use of technology by making investments to enhance our technological infrastructure and capabilities and by establishing a clear understanding of the uses of all forms of digital assets in our work.

PRIORITIES AND OBJECTIVES

Strengthen the Morgan's core technological infrastructure to improve productivity, workflow, and outreach and to ensure data integrity.

- * Undertake a comprehensive inventory and assessment of technological infrastructure at the Morgan.
- * Develop a master plan and begin its implementation.
- * Develop programs for staff skills assessment, education, and training.

Strengthen the creation and management of digital assets.

- * Develop and promulgate institutional standards for digital assets (collection-related, archival, and administrative) to improve productivity and safeguard information.
- * Enhance the management of Morgan-generated digital images and videos.
- * Formulate a long-term preservation strategy for born-digital collection items.

Expand digital capacity to support a broad spectrum of Morgan activities, including priorities for collection stewardship and audience engagement.

- * Develop a Digital Vision Statement for the organization in tandem with the work on digital engagement strategy outlined in theme B (Audience, Engagement, and Profile).
- * Recognize digital trends as they emerge, share findings with stakeholders, and launch efforts to adapt as warranted.

Develop a desired structure for staffing technology functions at the Morgan.

- * Document the full scope of technological responsibilities, including those currently held by staff positions, those that are outsourced, and those not yet addressed.
- * Determine modifications to the roles and responsibilities of staff and outside contractors that would better support the scope of the Morgan's activities.



IV. ORGANIZATION, RESOURCES, AND FACILITIES

The Morgan's ability to fulfill its mission depends on long-term financial health, talented staff, and a well-cared-for and functional campus. Today, the Morgan employs over 120 full-time and 80 part-time staff and manages a 150,000-square-foot facility comprised of 4 architecturally significant buildings ranging from an 1850s brownstone to a glass-and-steel structure designed by Renzo Piano. Over the next 5 years, we will continue to strengthen the institution's financial position, build a vibrant and inclusive work culture, and steward the varied architecture of our Midtown location to meet the ever-changing needs of our collection, staff, and audiences.

PRIORITIES AND OBJECTIVES

Bolster the Morgan's financial sustainability.

- ★ Build the endowment, in particular its unrestricted funds, to strengthen support for core operations.
- ★ Increase earned and contributed income to create resilience during market downturns.
- ★ Align operating expenses with strategic priorities through budgeting and monitoring processes.

Become an employer of choice and foster a vibrant, inclusive, and more effective Morgan community.

- ★ Review and develop the Morgan's organizational structure and systems to fulfill our mission more efficiently.
- ★ Ensure and communicate competitive pay and benefits.
- ★ Build and support a more diverse workforce.
- ★ Nurture a collaborative and respectful work culture.

Steward a sustainable, functional, and accessible facility for future generations.

- ★ Improve the efficiency of climate control systems and lighting.
- ★ Ensure the physical integrity of buildings on the Morgan campus.
- ★ Enhance our safety and security infrastructure and training protocols.
- ★ Undertake campus improvements to better meet the needs and expectations of visitors, staff, and volunteers.



V. GOVERNANCE

The Board of Trustees of the Morgan Library & Museum serve as the long-term stewards of the institution, ensuring its fidelity to its mission and values and the preservation of its collections and other assets for future generations. As we enter our second century and commence implementation of this strategic plan, the role of governance will be critical. We will look for opportunities to strengthen our governance, engage trustees in understanding the breadth and depth of our mission, and develop new cohorts of trustees for the future.

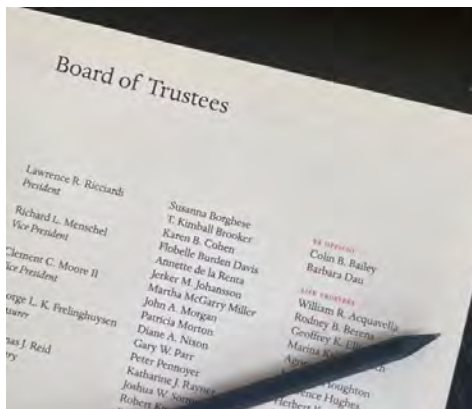
PRIORITIES AND OBJECTIVES

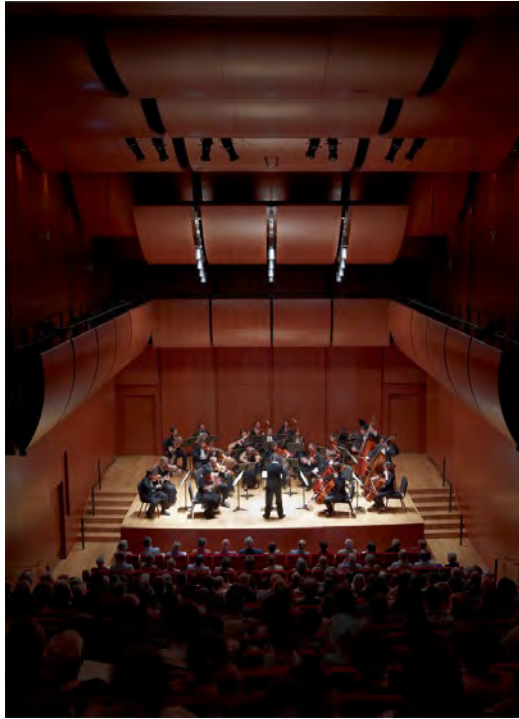
Strengthen the Morgan's governance to support institutional priorities.

- ★ Review the Morgan's governance policies and practices to ensure the effective execution of governance responsibilities.
- ★ Foster lasting relationships among trustees and life trustees.
- ★ Forge meaningful connections between trustees, life trustees, and staff based on contexts and interests.

Evolve the membership of the trustees to better reflect the New York City community and engage future generations of collectors and leaders.

- ★ Articulate goals and ambitions for board growth and development.
- ★ Expand engagement and relationship-building aligned with nominating priorities for board composition.





Planning Process and Participants

THE PLANNING PROCESS

The Morgan embarked on a strategic planning process in January 2023 with three principal aims: to set priorities for the next five years, to update our mission and values statements, and to develop a detailed implementation plan for Fiscal Years 2025 and 2026.

Work proceeded in four phases guided by a Staff Strategic Planning Committee and a Trustee Advisory Group with additional input and participation by trustees, staff, and volunteers. Rosters of the principal planning groups are included in the appendix. The phases included:

Key Questions. The first phase of strategic planning concluded in May 2023 with a draft of key planning questions based on broad input from Morgan staff, trustees, and volunteers. The planning questions were developed by the Staff Strategic Planning Committee, discussed with the Trustee Advisory Group and board of trustees in May 2023, and refined based on those discussions.

Mission and Values. The mission and values work began in June 2023 with staff workshops and a volunteer focus group to explore key themes. The Mission and Values Working Group met over the summer and early fall to review the results of those sessions, to confirm core ideas for mission and values statements, and to draft the statements themselves. A working draft of the values statement was presented to the Trustee Advisory Group and board of trustees in October. A final working draft of the mission statement was completed in December 2023 and discussed with the Trustee Advisory Group in January.

Framework of Priorities. Work on the Framework of Priorities began over the summer with two meetings of the Staff Strategic Planning Committee to review the planning questions and begin shaping priorities and objectives. Work continued through early October 2023 as four staff working groups convened to develop priorities and objectives for each theme of the plan. Working groups were led by members of the Staff Strategic Planning Committee from departments across the Morgan. Twenty-five staff participated in the working groups. The Framework was discussed with the Trustee Advisory Group and the board of trustees in October.

Implementation Plan. This work began in November 2023 and concluded in early January 2024. Working groups developed detailed implementation plans for the first two years of each of the five themes, including action steps, responsibility, timeline, and estimated resource requirements. Twenty-nine staff participated in the working groups. The Staff Strategic Planning Committee and Senior Administrative Staff met to discuss work in progress, strengthen interconnections between priorities and objectives across the themes, and review resource requirements. The implementation plan was discussed with the Trustee Advisory Group in January.

PLANNING PARTICIPANTS

Strategic Plan Trustee Advisory Group

G. Scott Clemons
George L. K. Frelinghuysen
Richard L. Menschel
Clement C. (Chips) Moore II
Patricia Morton
Peter Pennoyer
Katharine J. Rayner
Thomas J. Reid
Lawrence R. Ricciardi

Staff Strategic Planning Committee

Noreen Khalid Ahmad
Colin B. Bailey
Linden Chubin
Maria Fredericks
Dan Friedman
Jessica Ludwig
John Marciari
Philip Palmer
Lauren Stakias
Kristina W. Stillman

Working Group on Mission and Values

Noreen Khalid Ahmad
Jessica Ludwig
John Marciari
Lauren Stakias
Kristina W. Stillman

Staff Working Groups for Priorities and Objectives

AUDIENCE, ENGAGEMENT,
AND PROFILE
Noreen Khalid Ahmad
Jesse Erickson
Aubrey Herr
Nicole Leist
Jessica Ludwig
Yvette Mugnano
Lauren Stakias

COLLECTIONS, EXHIBITIONS,
AND SCHOLARSHIP
Elizabeth Abbarno
Isabelle Dervaux
Maria Fredericks
John Marciari
María Molestina
Ryan Newbanks
Philip Palmer

TECHNOLOGICAL CAPACITY AND CAPABILITIES

Nick Danisi
Josh Feldman
Dan Friedman
Maria Oldal
Marilyn Palmeri
Kristina W. Stillman
Stacy Welkowitz

ORGANIZATION, RESOURCES, AND GOVERNANCE

Nick Danisi
Gerard Dengel
Dorian Lewis-Hood
Jessica Ludwig
Mary Schlitzer
Eden Solomon
Lauren Stakias
Kristina Stillman

Staff Working Groups for Implementation Planning

AUDIENCE, ENGAGEMENT,
AND PROFILE
Noreen Khalid Ahmad
Jesse Erickson
Aubrey Herr
Jennifer Kalter
Nicole Leist
Jessica Ludwig
Yvette Mugnano
Lauren Stakias

COLLECTIONS, EXHIBITIONS,
AND SCHOLARSHIP
Elizabeth Abbarno
Sheelagh Bevan
Isabelle Dervaux
Maria Fredericks
John Marciari
María Molestina
Ryan Newbanks
Philip Palmer

TECHNOLOGICAL CAPACITY AND CAPABILITIES

Colin B. Bailey
Josh Feldman
Dan Friedman
Adrian Giannini
Maria Oldal
Marilyn Palmeri
Kristina W. Stillman
Stacy Welkowitz

ORGANIZATION, RESOURCES, AND FACILITIES

Nick Danisi
Gerard Dengel
Dorian Lewis-Hood
Jessica Ludwig
Mary Schlitzer
Eden Solomon
Lauren Stakias
Kristina W. Stillman

GOVERNANCE

*(In collaboration with Nominating
and Governance Committee)*

Colin B. Bailey
Jessica Ludwig
Lauren Stakias
Kristina W. Stillman

COVER

1. © Brett Beyer, 2022.

PAGE 2

1. Centennial Tote bag photographed in The Morgan Shop, photography by Carmen González Fraile, January 8, 2024 (with assistance by Jessica Micolta, Graham S. Haber intern)
2. Lindau Gospels, (MS M.1) in case in Mr. Morgan's Library, the East Room, Photography by Graham S. Haber, February 2016
3. Qur'an, Shiraz, 1580. The Morgan Library & Museum, MS M.532, fol. 276r, Vol II. Photography by Graham S. Haber.
4. Scott Joplin (1868–1917). Maple leaf rag / St. Louis : John Stark & Son, ca. 1899, front cover. The Morgan Library & Museum, James Fuld Collection. Photography by Graham S. Haber, 2021.
5. Reba Fischman Snyder in the Thaw Conservation Center. Video by Sanden Wolff
6. The Sun, Visconti-Sforza Tarot Cards, Milan, Italy, ca. 1450–1480. The Morgan Library & Museum, MS M.630.13. Photography by Graham S. Haber, 2017.
7. Georg Baselitz (1938–), *Untitled* [drawing], 1984. The Morgan Library & Museum, Gift of the Baselitz Family, 2022.107. Photography by Jochen Littkemann. © 2024 Georg Baselitz.

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1. Colin Bailey in the Rotunda. Photography by Graham S. Haber, November 2015

The Morgan Library & Museum

225 Madison Avenue
New York, NY 10016
(212) 685-0008

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1. The Morgan Library & Museum Gilbert Court facing east, with school group, Photography by Graham S. Haber, May 2012
2. Hendrik Goltzius (1558–1617), *Young Man Holding a Skull and a Tulip*, 1614. Purchased by Pierpont Morgan in 1909.
3. Alfred Jarry printed materials composite image. © The Morgan Library & Museum. Photography by Graham S. Haber, 2019.
4. Heures nouvelles dédiées à Madame Royale. A Bruxelles: Chez Jean Joseph Boucherie, 1759, front cover. The Morgan Library & Museum, PML 125711. Photography by Janny Chiu, 2021.
5. Nina Katchadourian, 2022. *Who's Afraid of Virginia Woolf?*, from the series "Look Who's Talking," 2022. The Morgan Library & Museum, Purchased as the gift of Richard and Ronay Menschel, 2023.1:13.
6. Photography by John Calabrese

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1. Students in the Reading Room during College Night, November 2, 2022, at the Morgan Library & Museum. Photography by John Calabrese.
2. The Morgan Library & Museum. Photography by Janny Chiu, 2016.
3. Students from PS 118Q on a class tour

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1. De-installation of *Entrance to the Mind: Drawings by George Condo in the Morgan*, Thaw Gallery, May 2023, Photography by Janny Chiu
2. Jean de Brunhoff (1899–1937), *Histoire de Babar, le petit éléphant* : maquette with draft text and illustrations, ca. 1930–1931, front cover. The Morgan Library & Museum, MA 6304.01. Photography by Schecter Lee, 2007.

3. Winged hero with scimitar, bull, and lion. between 701 B.C. and 601 B.C. The Morgan Library & Museum, Morgan Seal 747
4. Mary Oey, Music Digitization Project Conservator, Thaw Conservation Center, The Morgan Library & Museum
5. Gilbert Parrilla, Maintenance Engineer, working on exterior of Renzo Piano building, Photography by Javier Rivera
6. Janny Chiu, Photographer, photographing *Blaise Cendrars: Poetry is Everything* exhibit, Thaw Gallery, May 26, 2023, Photography by Marilyn Palmeri
7. Hours of Catherine of Cleves, ca. 1440. The Morgan Library & Museum, MS M. 945, fol. iv. Photography courtesy of Faksimile Verlag Luzern
8. Paul Gauguin (1848–1903), *Study for Breton Girls Dancing, Pont-Aven*, 1888. The Morgan Library & Museum, Thaw Collection, 2010.136.

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1. Installation views: *PLEASE SEND TO REAL LIFE: Ray Johnson Photographs*, Thaw Gallery. The Morgan Library & Museum, Photography by Janny Chiu, 2022. © Ray Johnson / Artists Rights Society (ARS), New York
2. Sherman Fairchild Reading Room with readers, The Morgan Library & Museum, Photography by Graham S. Haber, 2018

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1. Students in the Education Center. Video by Sanden Wolff
2. The Morgan, Connected on desktop and mobile

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1. Morgan Library & Museum Digital Studio. Photography by Graham S. Haber, 2013.

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1. © Michel Denance, 2006
2. Jennifer Tonkovich, Eugene & Clare Thaw Curator, Drawings & Prints, Christina Ludgood, Manager of Communications and Marketing, Chie Xu, Coordinator of Communications & Marketing, reviewing *Into the Woods: Karen Cohen Gift banners*, May 3, 2023. Photography by Janny Chiu

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1. Photography by Lydia Shaw
2. Annual Summer Luncheon, June 26, 2023. Photography by John Calabrese

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1. J. Pierpont Morgan's Library and the Morgan Garden, view looking west toward the Annex. Courtesy of the Morgan Library & Museum, New York. © Brett Beyer, 2022.
2. Photography by John Calabrese
3. William Blake (1757–1827). *America: a prophecy*. The Morgan Library & Museum, PML 16134.9. Photography by Carmen González Fraile, 2023.
4. Gilder Lehrman Hall during a music performance, May 31, 2012, Photography by Graham S. Haber, The Morgan Library & Museum.
5. Nicolas Poussin (1594?–1665), *The Holy Family on the Steps*, 1646–1648. The Morgan Library & Museum, Purchased by Pierpont Morgan in 1909.
6. Installation views: *Seeds of Knowledge: Early Modern Illustrated Herbals*, October 6, 2023 through January 14, 2024, Thaw Gallery. Photography by Carmen González Fraile
7. © Brett Beyer, 2022.
8. Paul Cézanne (1839–1906), *Still Life with Pears and Apples, Covered Blue Jar, and a Bottle of Wine*, 1902–1906. The Morgan Library & Museum, Thaw Collection, 2002.61.

Collecting
Engaging
Sharing
Stories

Cumberland County
**HISTORICAL
SOCIETY**



Strategic Plan

2015-2020

2019 Update

A MESSAGE

*from Executive Director Jason Illari
on behalf of CCHS Staff and Board of Trustees*

"I'm keenly aware of the Principle of Priority, which states (a) you must know the difference between what is urgent and what is important, and (b) you must do what is important first. What's important is the work."

- Steven Pressfield,
The War of Art

This quote accurately reflects the theme of CCHS' 2015-2020 Strategic Plan. Our plan strategically addresses important goals, objectives and tasks over the next few years which are critical to the Society's long term success. Another theme of the Strategic Plan is transparency. Our membership, history and arts communities, elected officials, sponsors and citizens of Cumberland County should know what we do well but also how we can improve. This document is intentionally designed to be studied, changed and even expanded upon over the coming months and years.

Embedded in the Plan, readers will note significant initiatives and benchmarks worthy of expanding upon here:

Vale-Himes Pocket Park

This included the demolition of the Society's 5 North Pitt Street property and saw the installation of a community-oriented pocket-park on the site's footprint in 2018. We set a \$250,000 goal to complete



Executive Director Jason Illari

this project and surpassed the goal. A bigger campaign, to launch around 2020, will focus on storage expansion and how best to utilize CCHS' building on High Street.

Public opening and development of our new High Street History Workshop.

Thanks to the generous support of the George B. Stuart Foundation, in tandem with grant funds from the Cumberland County Housing and Redevelopment Authorities, the Society opened its new educational space adjacent to History on



Vale-Himes Park opening

High the Shop. Designed for children of all ages, the History Workshop will provide hands-on history experiences throughout the year.

Development of CCHS research and publications in the digital age.

CCHS cares for nationally significant collections, archival and photographic materials, and bound-published historical content. Yet, altogether, these resources remain relatively untapped in the digital age. While we continue to strengthen the Society's journal and other means for advancing traditional scholarship, the new CCHS website, the Gardner Digital Library website and a renewed focus on social media will enable us to reach out in ways we never thought possible. Patrons will note increased access to collections online in the coming months and years. One example is the Carlisle Indian School focused subdomain: <https://carlisleindian.historicalsociety.com>, launched in 2018.

Financial viability and sustainability.

Endowment growth, an important element of the Access to History Plan, continues to be a pressing issue, as does the establishment of a CCHS Historic Properties Maintenance Fund. The completion of our Sponsorship Opportunities brochure is an important focus moving forward. Also,

creating better ways to acknowledge giving will play a vital role in strengthening the Society's financial outlook.

For-purpose, mission-driven activities.

In everything we do, mission is key. As we look to develop the interpretation of sites, collections and stories we will be true to our mission "to collect, preserve, interpret and promote research and education about the history of Cumberland County, Pennsylvania." This means that a concerted push to expand outreach county-wide is a hallmark of the new Strategic Plan. Our county-themed bus tours, preservation activities, Carlisle Journeys conference, publications, lectures and exhibits all contribute to connecting patrons to CCHS' mission.

Continued emphasis on people and their stories.

The mission of the Cumberland County Historical Society is strengthened by our remembrance of people through history. Every day, dedicated staff, volunteers, members, and patrons diligently work to carry on the stories and memories of those who went before us. Our new call to action of "collecting, engaging, sharing stories" is a constant reminder that history does strengthen communities and bring people together for diverse avenues of service

to others. Every object, piece of paper, photograph, building and landscape has a unique story to tell, but only when their makers' story is shared in a meaningful way.



Preservation Learning Lab in New Kingston

Our **mission**
articulates what we do.

Our **vision** helps us understand
the “why” behind our mission and
where we are going.



Overlooking the Conodoguinet Creek from Cave Hill, near Carlisle.
Photo by A. A. Line, 1910s.

Collections Storage.

Over the past several years, CCHS alleviated some of its most pressing storage challenges by reevaluating collections space at the Society. Yet, more climate-controlled space will become a necessity in the future. There may come a time when multiple institutions come together to collectively partner to care for our county's vast material culture. Creativity and collaboration will allow us to explore unique strategies for collections storage in a sustainable, expandable way.

Accreditation.

According to recent statistics provided by the Institute of Museum and Library Services there are approximately 35,000 museums in the United States. Included in this number are historical societies like CCHS. Just over 1000 (of the 35K) are accredited through the American Alliance of Museums. Accreditation, in a nutshell, is a rigorous process by which institutions are compelled to meet standards and best practices in the field across all departments. The process results in a mark of distinction among peers in the history and arts sector. Over the next several years CCHS will strive to position the Cumberland County Historical Society to secure Accreditation and make an application by at least 2020.

Vision Statement.

Our mission articulates what we do. Our vision helps us understand the “why” behind our mission and where we are going. The Cumberland County Historical Society's vision “is to become a national model for demonstrating how history, story-telling, material culture and preservation promotes social well-being, service and citizen engagement with local resources.”

CCHS is strong thanks to stalwart supporters over the years and a tremendous staff, board and volunteer-core. We are poised to become a “national model” for similar organizations to look to as our newly developed vision statement attests. Unified action, and a thorough understanding of how each strategy and task pushes us forward, will help us realize this vision.

We appreciate every effort you give to help preserve and promote Cumberland County's unique history. Your ongoing support will ensure the success of this and future plans.

Mission

The mission of the CCHS is to collect, preserve, interpret and promote research and education about the history of Cumberland County, Pennsylvania.

Vision

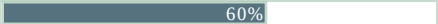
Our vision is to become a national model for demonstrating how history, story-telling, material culture and preservation promotes social well-being, service and citizen engagement with local resources.

Goal 1

Serve as a county-wide and regional leader in history, education and preservation

Objective 1A  80%

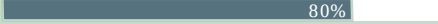
Establish formal partnerships with county history & arts agencies

Objective 1B  60%

Create robust program with re-granting & resource-sharing capacity

Objective 1C  70%

Define CCHS' historic preservation presence in the county

Objective 1D  80%

Promote the Society's brand in traditional and social media outlets

Strategies/Tasks (1)

- ✓ Begin formal meetings with history and arts organizations in county
- ✓ Establish income stream or budget line item for (re)grants- create granting policy & procedures
- ✓ Creation of new CCHS website & blog
- ✓ Continue event- based partnerships with county entities
 - Join Mechanicsburg, Shippensburg & West Shore Chambers of Commerce
- ✓ Expand register of historic places program and fully implement SMP preservation grant initiative
- ✓ Develop themed county-wide bus tours and 1 preservation oriented CCHS fundraising tour
 - Development of Board approved Community Outreach Plan
- Create social media policy & procedures in Community Outreach Plan appendix
- ✓ Complete historical topics speaker list on website and promote use as an outreach resource
- ✓ Formalize History POPS! outreach with local history groups
- ✓ Formalize Preservation Roundtable activities
- ✓ Initiate Annual Dinner rotation schedule
 - Create visitor/participant surveys & feedback mechanisms to encourage engagement, foster constructive public dialogue & strengthen outreach
 - Revamp e-newsletter format & content
 - Complete Phase 4 of PHC Heart & Soul Initiative

Mission

The mission of the CCHS is to collect, preserve, interpret and promote research and education about the history of Cumberland County, Pennsylvania.

Vision

Our vision is to become a national model for demonstrating how history, story-telling, material culture and preservation promotes social well-being, service and citizen engagement with local resources.

Goal 2

Actively encourage the community and world to engage with our collections, research and programming

- Objective 2A** 75%
Market the power of story to increase visitorship and membership
- Objective 2B** 95%
Establish new education space on High Street
- Objective 2C** 80%
Promote county-wide history and heritage tourism
- Objective 2D** 80%
Increase access to library and photograph resources & strengthen publications & research methods
- Objective 2E** 60%
Fully align HOH operations to promote mission and vision

Strategies/Tasks (2)

- Finish Interpretive Plan for TMH, Museum, and History on High - The Shop
- Formalize History Workshop programming
- ✓ Launch Gardner Digital Library project
- ✓ Set new benchmarks and budgets for McLain Festival, Carlisle Journeys and Golf Tournament
- ✓ Create Gardner Digital Library spotlight exhibit
- ✓ Host 1 Cumberland Pathways family history forum/conference by 2020
- Develop Acquisitions plan and grow acquisitions fund
- Increase HOH merchandise diversity and encourage themes harmonious with mission
- ✓ Create draft of CCHS records management policy with Board of Trustees approval
- Develop more efficient HOH volunteer schedule
- Create Amazon store account for publication sales
- Develop online Society collections access plan
- Join Museum Store Association
- ✓ Increase self-publishing and in-house printing including in-house journal publication
- ✓ Increase, track, & promote community storytelling (outreach and Heart & Soul Initiative)
- Make preparations in anticipation of CCHS's 150th anniversary in 2024, including possible publication related to society history
- Create online resource of significant CC collections amongst local organizations
- ✓ Create traveling exhibit of CC collections
- ✓ Open History Workshop

Mission

The mission of the CCHS is to collect, preserve, interpret and promote research and education about the history of Cumberland County, Pennsylvania.

Vision

Our vision is to become a national model for demonstrating how history, story-telling, material culture and preservation promotes social well-being, service and citizen engagement with local resources.

Goal 3

Establish a vibrant workplace and expand personnel capacity

- Objective 3A**80%
- Improve and optimize personnel duties and assignments
- Objective 3B**70%
- Enhance Volunteer, Intern, Work Study, Staff communication and efficiency
- Objective 3C**80%
- Optimize transparency & increase orientation towards mission and vision
- Objective 3D**90%
- Streamline committee functions and roles
- Objective 3E**60%
- Balance compensation packages and maximize various benefit opportunities for eligible staff

Strategies/Tasks (3)

- ✓

Implement Executive Committee approved Personnel and Department Structure Plan
- Design new ed/museum “docent” combo program
- Host at least 2 mandatory workshops for staff per year focused on historic interpretation, skills, development, vision, or engagement
- ✓

Install new CCHS phone system
- Finish visitor services procedures manual
- ✓

Establish rotating schedule and program for Todd Hall cases
- ✓

Begin quarterly staff planning meetings
- ✓

Streamline staff reporting & evaluations
- ✓

Establish IT contract for routine maintenance
- ✓

Executive committee to realign or consolidate current committees and responsibilities
- Create staff and board professional development schedule- i.e. conf. attendance
- Establish volunteer orientation & cross-training procedures
- ✓

Review and revamp salaried positions’ flex time policy
- Set up viable retirement options for full-time staff
- ✓

Establish Community Outreach department
- Hire part-time marketing and development assistant in Community Outreach department

Mission

The mission of the CCHS is to collect, preserve, interpret and promote research and education about the history of Cumberland County, Pennsylvania.

Vision

Our vision is to become a national model for demonstrating how history, story-telling, material culture and preservation promotes social well-being, service and citizen engagement with local resources.

Goal 4

Prepare for a sustainable and dynamic future

- Objective 4A**  50%
Increase endowment and establish growth benchmarks
- Objective 4B**  90%
Maintain high standards in accounting and bookkeeping
- Objective 4C**  80%
Increase staff participation in development, fundraising and budgeting
- Objective 4D**  20%
Secure Accreditation from the American Alliance of Museums

Strategies/Tasks (4)

- ✓ Complete design and marketing materials for planned giving & endowment
- ✓ Finish organizing appeal contacts into POS system
- ✓ Create Sponsorship Opportunities brochure
- ✓ Implement merit & COLA pay increase tracking forms
- ✓ AAM Pledge
 - Core Documents Verification
- ✓ Review/Update Library and Museum CMPs
 - Complete comprehensive emergency plan
- Assign staff and volunteer roles and responsibilities for Accreditation
- ✓ Create CCHS Historic Properties Maintenance Fund
 - Streamline membership outreach, renewal timing, and member program/benefits
- ✓ Set new endowment fund goal of \$5.5 million
- ✓ Define and streamline CCHS’s special project and legacy fund accounts

Mission

The mission of the CCHS is to collect, preserve, interpret and promote research and education about the history of Cumberland County, Pennsylvania.

Vision

Our vision is to become a national model for demonstrating how history, story-telling, material culture and preservation promotes social well-being, service and citizen engagement with local resources.

Goal 5

Improve physical spaces to enhance visitors’ experience

- Objective 5A

100%

Complete 5 Pitt demo and park installment
- Objective 5B

70%

Optimize use of Two Mile House for programming and education
- Objective 5C

60%

Strengthen visitor flow and interrelationship between all CCHS buildings
- Objective 5D

30%

Implement enhanced green practices in all facilities

Strategies/Tasks (5)

- ✓ Start Master Planning process
- ✓ Complete 5 N. Pitt demolition and build pocket park
- ✓ Redesign Pitt Street gardens
 - Conservation Assessment Report or Historic Structures Report completed for High Street Odd-fellows lodge & Two Mile House
- ✓ Re-line entire CCHS parking lot to maximize parking capacity
 - Create directional signage on Pitt Street and Dickinson Avenue to direct visitors to parking and building access
 - Develop Two Mile House exhibit concept
 - Two Mile House property maintenance brought to NPS and National Trust standards and best practices
- Draft green-practices policy and procedures document
- ✓ Finish marketing wrap for Society bus
 - Institute member, staff, volunteer buildings swipe card system for tracking and security
- ✓ New awning installed & redesigned portico at 21 N. Pitt Entrance
 - Todd Hall flooring engineering study
- ✓ Complete “History Lounge” project (for staff, volunteers, and patrons)
 - History on High Shop remodel feasibility study
 - Create rental policy for pocket park use and maintenance procedures

2019
Development
Committee:

Ann Hoffer (Chair)
Charles Allen
Tom Coolidge
Tita Eberly
Robert Grochalski
Jason Illari
John Lyter
Kate Theimer

A Sustainable & Dynamic Future

Goal 4 of the Cumberland County Historical Society's Strategic Plan calls for CCHS to "prepare for a sustainable and dynamic future."

In 2018, the Society's Development Committee and Board of Trustees agreed to examine the feasibility of raising the Society endowment fund from 3 million to 5.5 million, the specific amount needed for interest distributions to cover CCHS' operating budget and position the Society for long-term financial sustainability.

The Development Committee also worked tirelessly to streamline and enhance CCHS' special project & legacy fund accounts to communicate to donors and supporters our current needs and priorities. Planned giving is critical to the Society's success and is a straightforward way for our supporters to choose their own giving interests. Funds designated for endowment are automatically deposited into the endowment account. Furthermore, donations given for specific funds are also deposited into their respective designated special account(s). Appreciated stock gifts are welcome too and CCHS can facilitate the sale and deposit for Society designated accounts. In 2019 the Board of Trustees and Development Committee secured professional master planning services to formulate plans for the CCHS campus.



Howard Palmer at Pine Grove Park, 1898.

I have an interest in the following legacy funds:

- ☐ **Growing the Society's Endowment Fund** is a critical goal. The proceeds generated from the Society's Endowment Fund support mission-based educational activities, programs, events, and operations.
- ☐ A gift to the **Museum Collections Care Fund** or **Archives and Library Collections Care Fund** ensures that conservation and proper storage of our objects and archival materials is maintained to the highest standards.
- ☐ A planned gift to the **Properties Maintenance Fund** assists with the upkeep and preservation of the Society's buildings and grounds including the Two-Mile House, History on High Building, Archives and Museum Building and Pocket Park.
- ☐ **Special Publications Fund** growth supports the Society's longstanding tradition of high-quality journals, publications and periodicals which tell the story of Cumberland County history.
- ☐ A gift to the **Collections Acquisitions Fund** allows the Society to maintain a reserve of funds for rare collections purchases. This fund ensures Cumberland County collections stay in Cumberland County.
- ☐ The **Carlisle Journeys Fund** supports CCHS' free biennial Indian School Conference to share the story of the Carlisle Indian Industrial School and its lasting impact on our community and nation.
- ☐ Seed money for the **Society's Scholarships and Awards Fund** (History Pops!) allows the Society to contribute directly to local history students and worthy organizations in need of small project funding support.
- ☐ **Annual Appeal** contributions support year-end activities and enable the Society to transition from one year to the next on solid financial footing.
- ☐ Our **Education and Outreach Fund** supports significant initiatives such as annual conferences, festivals, lectures, tour programs and special exhibits in the G.B. Stuart History Workshop.

For more information about planning a gift return the attached form to:

CCHS 21 N. Pitt Street Carlisle, PA 17013
Inquires and questions can be directed to Executive Director
Jason Illari at jillari@historicalsociety.com
Gifts to the above mentioned funds can also be made securely online at <https://www.historicalociety.com/support/>

Please contact me at the following:

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____

Goals 2015–2018

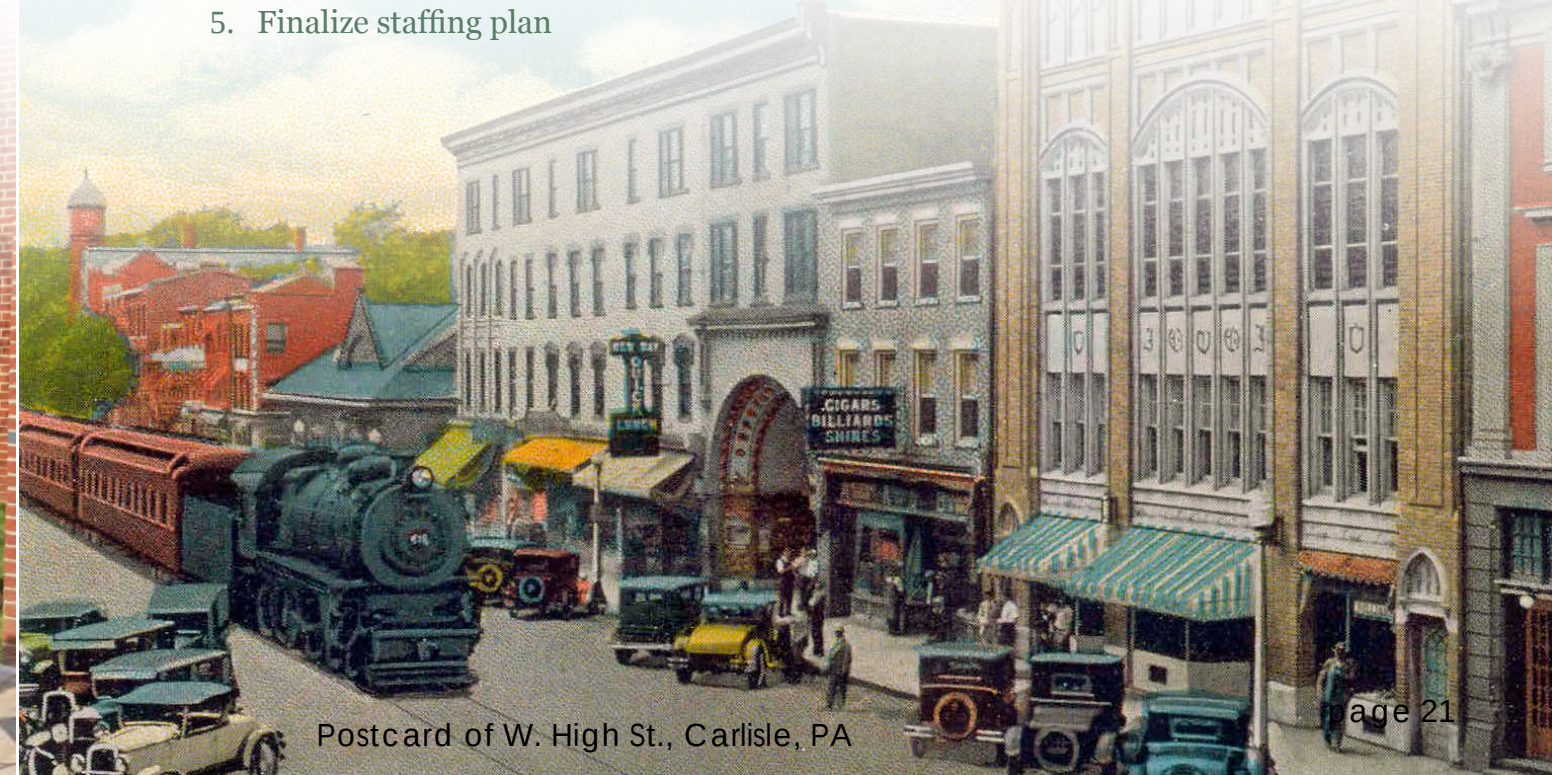
- ✓ 1. Demolish the 5 N. Pitt Street apartment building.
- ✓ 2. Install pocket-park, with HARB-approved decorative railing, on 5 N. Pitt Street footprint.
- ✓ 3. Complete lining and seal coating for entire CCHS lot.
- ✓ 4. Increase endowment through pocket park naming opportunity.
- 5. Install directional signage on entire campus including signage along Pitt Street and Dickinson Avenue to help direct visitors to CCHS parking and building access.
- ✓ 6. Establish CCHS Historic Properties Maintenance Fund.



Vale-Himes Park Opening

Master Plan 2020 & Beyond

- 1. Collections storage expansion analysis.
- 2. High Street building accessibility upgrades and interpretation.
- 3. Increase campus visibility
- 4. Upgrade technology
- 5. Finalize staffing plan
- 6. Enhance campus connectivity
- 7. Analyze strategic growth
- 8. Make programmatic and marketing preparations for CCHS' 150th anniversary in 2024.
- 9. Grow the endowment fund.



Postcard of W. High St., Carlisle, PA

And finally, once again ...
Our thanks.



*The Walnut Bottom Sesqui-Centennial in 1969.
In front are Mark Goodhart and Casey Jones.*

We cannot say it enough. We are in awe of what our group of members and supporters has done in just the past few years: the pocket park, the museum renovation, digital initiatives (and all the behind the scenes tech & tech support to make it happen), and fantastic new collections. These are just some of the highlights that you have made possible. The Cumberland County Historical Society is outstanding among its peers and it's the thriving, welcoming, engaged membership and volunteer base that makes that happen. Let's keep moving forward together.

— CCHS Committees —

Executive Committee – Chair, Ginny Mowery
Finance Committee – Chair, Tom Coolidge
Archives & Library Committee – Chair, Kate Theimer
Museum Committee – Chair, Pat Ferris
Community Outreach Committee – Chair, Linda Humes
Historic Properties Committee – Chair, David Smith
Publications Committee – Chair, David Smith
Education Committee – Chair, E. K. Weitzel
Nominating Committee – Chair, Tita Eberly
Development Committee – Chair, Ann Hoffer
Carlisle Journeys Conference Committee – Chair, Barb Landis
Awards & Scholarship Committee – Chair, Bob Grochalski
McLain Festival Committee – Chair, Lindsay Varner
Whiskey Rebellion Festival Committee – Chair, Lindsay Varner
Preservation Roundtable Steering Committee – Chair, Lindsay Varner
Golf Tournament Committee – Chair, Paul Hoch
Two Mile House – Trustee, Ann Hoffer



Pat Ferris
Jim Lisk E. K. Weitzel Sharon Filipovich Kevin Hess
Robert Grochalski Harriet Carn Charles Allen Tita Eberly
Ginny Mowery **Cara Curtis** Lucy Wolf **Linda Humes** Beverly Bone
Barbara Landis **John Lyter** **Lindsay Varner** Peggy Huffman
Tom Coolidge Lynda Mann Kate Theimer **Jason Illari**
Debbie Miller **Tim Bard** Ann Hoffer Richard Tritt
David Smith **Robert Schwartz**
Mary March Kim Laidler
André Weltman **Matthew March**
Blair Williams

**CCHS Board
& Staff 2019**

Front Cover:
Possibly the DeSanno family.

Strategic Plan 2024–2027

Reflecting on Our Past...Investing in Our Future



**VIRGINIA MUSEUM OF
HISTORY & CULTURE**



Strategic Plan 2024–2027

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*Reflecting on Our Past...
Investing in Our Future*

EXECUTIVE TEAM

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Chief Financial Officer
David R. Kunnen

VP for Advancement
Anna E. Powers

VP for Collections &
Exhibitions
Adam E. Scher

VP for Guest Engagement
Michael B. Plumb

VP for Human Resources
Paula C. Davis

VP for Marketing
& Communications
Tracy D. Schneider

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J. Sargeant Reynolds, Jr.
Xavier R. Richardson
Elizabeth A. Seegar
Robert D. Taylor
J. Tracy Walker IV

*Executive Committee #Chair-Elect (2025–2026)

The Virginia Museum of History & Culture is owned and operated by the Virginia Historical Society — a private, non-profit organization established in 1831. The historical society is the oldest cultural organization in Virginia, and one of the oldest and most distinguished history organizations in the nation. For use in its state history museum and its renowned research library, the historical society cares for a collection of nearly nine million items representing the ever-evolving story of Virginia.

OUR MISSION

Connecting people to America's past through the unparalleled story of Virginia. By collecting, preserving, and interpreting the Commonwealth's history, we link past with present and inspire future generations.

OUR VISION

We aspire to represent all Virginians as we meaningfully share the ever-evolving story of Virginia with a broader audience.

OUR VALUES



We are dedicated to preserving the past, as we believe knowledge and appreciation of history matters.



We are trusted stewards, committed to telling an accurate and inclusive story of Virginia.



We work passionately and with integrity to best represent ourselves, our colleagues, our institutions, and our critical mission.



We are service oriented, and we are welcoming and respectful to all.



We operate as one team; we are clear about our goals, transparent, and collaborate for success.



We are purposeful; we are innovative and entrepreneurial in the advancement of our mission.



We embrace partnership, and we are a strong and active contributor to our community and Commonwealth.



...in the most humble terms: has repeated letters have been received from the British nation. We have
able jurisdiction over us. We have surrounded them of the circumstances of an invasion and followed him. We have
by the ties of our common kindred to discover these usurpations, which would inevitably interrupt our connection
community. We must, therefore, acquiesce in the necessity of separation, and hold them
ations, do, in the name, and by authority of the good People of these colonies, solemnly publish and declare, that
States; that they are Absolved from all Allegiance to the British Crown, and that all political connection between
that as Free and Independent States, they have full Power to levy War, conclude Peace, contract Alliance, establish
States may of right do.

And for the support of this Declaration, with a firm reliance on the protection of
Divine Providence, we mutually pledge to each other our Lives, our Fortunes, and our sacred Honor.

Boston Quincy
Lymann Hall
Geo. Walton.

John Hancock
Samuel Adams
John Adams
Thomas Jefferson
George Washington
Edward Rutledge
The Marquis de Lafayette
Thomas Mifflin
Arthur Middleton
George Wythe
Richard Henry Lee
The Jefferson
Benjamin Franklin

INTRODUCTION

In just two years' time, the United States of America will mark its 250th anniversary. We must embrace this historic moment—extraordinary in our lifetimes—and act upon it by together renewing our commitment to the unfinished pursuit of *A More Perfect Union*—**to reflect deeply on our past and invest with great purpose in our future.**

The VMHC, Virginia's oldest museum and one of the finest in the nation, is uniquely positioned—a trusted voice in a tumultuous time—to connect Virginians and Americans with their compelling and collective story.

Over the past several years, the VMHC has been preparing for this moment. We are fulfilling our mission in new and innovative ways, and reaching more people in Virginia and beyond than at any time in our nearly two-century history. Our museum has been reimagined, our team has been expanded, and our fiscal health is strong. Now, we look ahead from a position of exceptional strength and limitless optimism.

This new strategic plan (2024–2027), built on guidance from our supporters, guests, community, trustees, and staff, charts a comprehensive path for our next three years that will see us through the commemoration of America's semiquincentennial and then set the stage for our own institutional bicentennial. We will build on, and maximize, the momentum and progress we've made over the past several years. As such, this plan focuses on programmatic excellence and smart growth, continued museum and library activation, investments in our intellectual core, statewide and national leadership, America's 250th and the urgent need for civics education, investments in technology and digital infrastructure, and continued sustainability and fiscal health. It is a meaningful, timely, and ambitious plan—one that will lead us thoughtfully forward.

Thank you for your support and participation,



Jamie O. Bosket
President & CEO







ENGAGE

THEME 1: ENGAGE



We will continue to attract an ever-growing audience that is increasingly reflective of our Commonwealth. We will rank among the seminal Virginia museum experiences; be an essential resource for scholarship and learning; and be a leader in the commemoration of America's 250th in Virginia and beyond.

GOAL A

We will enhance our new museum experience with robust public programming, exhibitions, and related activities that drive museum visitation, encourage participation by new audiences, and add to our overall institutional vibrancy.

INITIATIVES & AREAS OF FOCUS

- New Public Programs (with special focus on America's 250th)
- Enhanced Special Exhibition Program
- Expanded Statewide Traveling Exhibition Program
- New Guest Experiences (with special focus on accessibility and language tools)



GOAL B

We will expand our statewide educational offerings for students. We will be a primary, one-stop-shop for Virginia history and, through the work of our new John Marshall Center, civics education. We will continue to strengthen relationships with, and provide support for, teachers across the Commonwealth.

INITIATIVES & AREAS OF FOCUS

- Enhanced Statewide Educational Programs
- New Classroom Resources (with special focus on civics education)

GOAL C

We will continue the growth and progress of our community engagement activities to build and expand trust relationships and mutuality with organizations with shared values and that connect the VMHC with new and diverse audiences.

INITIATIVES & AREAS OF FOCUS

- Enhanced Community Partners Program
- New Partnership-based Cultural Festivals & Events

GOAL D

We will smartly and determinedly promote the VMHC to maximize the potential of our mission activities by driving visitation and engagement, raising awareness of our work and progress, and building a stronger digital community.

INITIATIVES & AREAS OF FOCUS

- Increased Outreach & Promotion (with special focus on earned and social media)
- New Production & Use of Multimedia Assets (with special focus on video and podcasts)
- New Virtual Engagement Tools & Experiences



PRESERVE



THEME 2: PRESERVE



We will continue to grow and safeguard our collections and develop new and innovative ways to make them more publicly accessible. We will ensure our collections are an essential source of knowledge about the Commonwealth. We will invest in scholars and publishing opportunities to further expand a lasting body of knowledge about Virginia history.



GOAL A

We will continue to encourage active use of our new E. Claiborne Robins, Jr. Research Library, strengthen relationships with the academic community, and more actively publish works in order to expand our role as a leading history content provider.

INITIATIVES & AREAS OF FOCUS

- Increased Library Usership & Access
- Expanded Investment in Scholarly Pursuits
- New Publishing Program

GOAL B

We will improve the depth and breadth of our collections to better represent all Virginia history and the many people who made it.

INITIATIVES & AREAS OF FOCUS

- Greater Investment in Underrepresented Areas of Existing Collections
- New Emphasis on Collecting Contemporary Materials
- Expansion of Signature Collections (with special focus on Reynolds Business History Center and The John Marshall Historical Collection)

GOAL C

We will thoughtfully consider the future of our collections databases and explore the potential of making our online catalogues more user friendly and up to date, with special focus on making collections-related digital resources significantly more accessible.

INITIATIVES & AREAS OF FOCUS

- Planning for Enhanced Artifact & Archive Catalogues
- Planning for New Digital Asset Management System



State of the Museum
September 20

CONVENE



THEME 3: CONVENE



We will be the statewide hub for history museums, historic houses, and like-minded organizations to promote history, inspire learning, and encourage a network of collaboration and progress. We will participate in, and foster, local, state, and national conversations that support the commemoration of America's 250th and advance the study of history and civics overall.



GOAL A

We will further position the VMHC as a leader among Virginia history organizations and provide connectedness and support that strengthens our collective efforts to preserve and educate.

INITIATIVES & AREAS OF FOCUS

- Encourage Statewide Collaboration of History Museums & Historical Societies
- Improved Reach and Impact of Statewide History Grant Program

GOAL B

We will initiate new means by which to connect the VMHC with national leaders and conversations, and to reinforce our national presence through more active outreach, alliance, and industry participation.

INITIATIVES & AREAS OF FOCUS

- New National History and Patriotic Service Award Program
- Increased Staff Participation and Leadership in Industry Organizations, Conferences, & Gatherings
- Expanded Statewide and National Leadership of America's 250th Commemoration



SUSTAIN



THEME 4: SUSTAIN



We will remain a model of responsible management and fiscal stability. We will invest in our staff and volunteers, and continually improve our financial resilience through an increasingly optimized revenue portfolio of earned income, charitable giving, and responsible use of our endowment. We will work diligently to ensure the safety and security of our people, collections, property, and brand.

GOAL A

We will invest in our team to increase satisfaction, productivity, and institutional effectiveness.

INITIATIVES & AREAS OF FOCUS

- Improved Investment in Professional Development & Team Capacity
- Expanded Volunteer Program
- Refreshed Internship Program



GOAL B

We will continue to improve our revenue model and our overall self-sustainability.

INITIATIVES & AREAS OF FOCUS

- Growth of Earned Income Portfolio (with special focus on events, facility rentals, retail, & food/beverage operations)
- Growth of Endowment
- Enhanced Fundraising & Stewardship Efforts
- Expanded & Enriched Membership Program

GOAL C

We will improve the sustainability of our facilities and further implement best practices for safety and security.

INITIATIVES & AREAS OF FOCUS

- Improved Security & Emergency Preparedness Practices
- Greater Technological Resilience & Security
- New Proactive Buildings & Grounds Care Program

GOAL D

We will implement and plan for timely capital improvements at Virginia House to prepare it for its centennial anniversary period and its continued use and vitality.

INITIATIVES & AREAS OF FOCUS

- New Touring Experiences
- Enhanced Security & Accessibility Infrastructure
- New Legacy Restoration Projects

*We can only do this if we do this together.
Please join us!*

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VIRGINIA MUSEUM OF HISTORY & CULTURE

428 N ARTHUR ASHE BOULEVARD
RICHMOND, VIRGINIA 23220

VIRGINIAHISTORY.ORG

STRATEGIC PLAN 2020-2030



February 2021

MISSION

Empowering people to create a just and compassionate future by exploring, preserving, and sharing the complexity of our past.

VISION

As the nation's history museum, we challenge ourselves to become the country's most accessible, inclusive, relevant, and sustainable public history institution. To fulfill that role, by 2030 we will serve an audience that reflects the full racial, class, gender, ethnic, and geographic demographics of the United States.

THE NATION'S HISTORY MUSEUM

The National Museum of American History is the steward of the national collections and is honored to hold the public's trust. At the heart of the museum are the dedicated professionals who care for its audiences, collections, resources, messages, buildings, and scholarship, all in service to the people of the United States. From our nearly 800,000-square-foot home on the National Mall and through our numerous online channels, the museum welcomes millions of people every year from across the country and around the world, free of charge. We are also much larger than ourselves: we are honored to benefit from the passion, advice, and support of our National Board and thousands of generous donors and volunteers. The museum also contributes to and benefits from its place in the remarkable Smithsonian Institution—the world's largest museum, education, and research complex, thanks to a unique public-private partnership. With the critical support of the federal government, together we enact the country's highest educational aspiration: the increase and diffusion of knowledge. We are honored to be an essential part of a rich network that serves the public together through conversation, collaboration, and partnership.

We have a unique and cherished role as the only museum in the country dedicated to telling the full history of the United States. Knowledge of the past is not a luxury: it is a necessity for civic health. Learning history helps people understand that today's world is not inevitable, but the result of myriad choices and actions made by individuals and communities. People see the range of creativity and cruelty, insight and indifference, innovation and injustice of which humans are capable. With this knowledge, they can take more informed, just, and compassionate actions to forge a shared future.

The National Museum of American History is a forum where people engage with one another and with stories of the United States' history that can inspire and challenge them. In our galleries and online, we have connected generations of Americans to deeply researched history via an exceptionally broad range of primary sources and material culture. In the coming decade, the museum will focus more on supporting preK–12 learners. We will use our resources to help these rising generations be inspired by the past, as well as share, debate, learn, and make sense of the contemporary world, so that we can together create a better future.

OUR CHALLENGES

The National Museum of American History is devoted to studying and understanding the past. However, the museum does not stand separate from the tumult of the contemporary world. Like our audiences, we are affected by the goodness and creativity of humanity as well as the forces of racism, xenophobia, climate change, and now in the Spring of 2020, a global pandemic. History can play a pivotal role in helping people grapple with these enormous challenges and see personal and communal opportunities for change. As a forum, the museum is a place for people to confront the complexity of our shared history, in order to make sense of the world around them.

The discipline of history itself is ever evolving and broadening as scholars ask new questions of the past. The museum field continues to change, responding to the new ways visitors encounter museums and the new expectations audiences have for these institutions.

To be meaningful and relevant to this changing world, we must build on our legacy of research and expertise while increasing our financial sustainability and the resilience of our physical infrastructure.

Over the past year, we have assessed our performance, consulted experts throughout the museum and history fields, invited critical response from staff, and conducted a large public survey to better define our role in today's museum landscape. Through these conversations, we have identified why we must and how we can evolve to become the most accessible, inclusive, relevant, and sustainable history museum in the nation.

In the process, we identified the values, goals, and priorities that will guide our decision-making and fundraising. These are defined within this strategic plan and will inform our tactical decisions as we move forward together.

“To be meaningful and relevant to this changing world, we must build on our legacy of research and expertise while increasing our financial sustainability and the resilience of our physical infrastructure.”

| VALUES

Our work will be guided and governed by our core values:

Accountability

We are responsible for our work and for its outcomes. Our work is grounded in rigorous scholarship, research, and best practices, and it adheres to the highest standards of ethics. We pledge to be disciplined about sticking to the priorities we set and about ensuring that our priorities are well-resourced and well-staffed. We are committed to a culture of rigorous evaluation to understand and demonstrate the impact of what we do.

Care

Care is the value around which all our work is centered. We care for our national collections. We care for our audiences, both physical and digital, throughout their journey with us. And we care for one another, creating a community culture that values honest, supportive communication and honors our unique strengths and diverse experiences.

Collaboration

We are all connected, and we succeed together, reaching across internal barriers and developing strong and mutually beneficial external partnerships. Everything we do is in collaboration with our publics, who bring their own expertise and experiences.

Courage

The work ahead of us won't be easy. Change requires creativity and takes courage. We will need to have challenging conversations with our visitors, supporters, colleagues—and ourselves. We will uphold our values even when it's hard.

GOAL 1: ACCESSIBILITY

Become the most accessible history museum in the country.

Priorities:

- Invest in Our Digital Future
- Center the Visitor Experience

Strategies

We commit to:

- Applying inclusive design principles in all our work in order to make everything we do in our physical and virtual spaces accessible to the broadest range of people. We will apply these principles to improvements in long-term exhibitions, and we will establish products, resources, and solutions to remove barriers to participation with our museum. We will meet and exceed current guidelines specified by the Americans with Disabilities Act to become the most physically and intellectually accessible museum in the country.
- Furthering language justice, the idea that everyone has the right to communicate in the language in which they feel most comfortable to understand and to be understood. All our initiatives will include a proactive multilingual strategy to support language justice that best serves our diverse audiences.
- Providing a welcoming experience for all audiences. We will implement best practices from the museum field to ensure that everyone feels welcome and safe. We will prioritize funding a stable and robust visitor services staff to become the most welcoming museum on the National Mall.
- Making collections widely available for our global audiences, both in person and online, and using technology to enhance their value. We will develop structures and workflows to support best practices for cataloging and describing objects. We will create and implement thoughtful collecting plans to address deaccessioning, standardization, diversity, and decolonization of collections.
- Incorporating digital access to all our work as an essential component of every project. We will increase our staff capacity and set standards to make our work available beyond our walls. We will prioritize digital and physical projects that make our collections and resources more accessible to preK–12 audiences, building on our existing outreach to teachers and students.

GOAL 2: INCLUSION

Become the most inclusive history museum in the country.

Priorities:

- Focus on Diversity and Inclusion at all Levels
- Strive for Operational Excellence

Strategies

We commit to:

- Examining the complex histories of the United States and of our own museum, recognizing that diversity, equity, and inclusion undergird excellence in scholarship and collections stewardship.
- Ensuring that audiences reflect the country we serve. By 2030 the racial, class, gender, ethnic, and geographic profile of our audiences will match the demographic profile of the United States.
- Fostering engaged relationships with our communities and partners, in collecting, co-curating, and collaborating on programs, generously sharing our resources—especially with audiences who face barriers to using our museum and its offerings.
- Supporting a culture of open communication, support, mutual respect, and empathy for all who work in and with the museum.
- Building administrative, staffing, hiring, and governance practices that prioritize diversity, equity, and inclusion for volunteers, interns, fellows, staff, and the museum's National Board.
- Creating and implementing two museum-wide comprehensive plans, one to promote and activate inclusivity practices and one to promote and activate decolonization practices. These plans will address the ways in which the museum's structures and practices further structural racism, sexism, and other forms of bias and will provide a framework for an intentional, active, and ongoing practice that rebuilds museum structures based on principles of equity and justice.

GOAL 3: RELEVANCE

Become the most relevant history museum in the country.

Priorities:

- Engage Learners in PreK–12
- Explore Contemporary Connections to History

Strategies

We commit to:

- Valuing the production of research and scholarship, including work co-created with our publics, as an essential element of our role as a public history institution.
- Crafting a museum-wide interpretive plan that provides direction, focus, and priorities for our work and integrates visitors' experiences within the museum, in classrooms, and on digital channels.
- Creating opportunities for young people (preK–12) to develop their civic identity by engaging in conversations about the relationship of history to the present and the future.
- Encouraging creative and inventive methods of storytelling and engagement. We will use thoughtful, inclusive, and dynamic interpretation and design to create experiences that deeply connect with audiences.
- Examining the historical context of contemporary life and developing a realistic and sustainable plan for responsive engagement with contemporary issues and current events.
- Adopting an assertive, transparent approach to how we share our messages with our audiences. We will do our work “in public” and share our processes, decisions, collections, and intellectual content with our constituencies.
- Developing and sustaining the infrastructure to collect, exhibit, and preserve the born-digital materials essential to documenting the 21st century.

GOAL 4: SUSTAINABILITY

Become the most sustainable history museum in the country.

Priorities:

- Center Collections Stewardship
- Build Resiliency in Our Facilities and Operations

Strategies

We commit to:

- Implementing best practices for government and nonprofit administration to manage resources, planning funding strategies to support authorized short- and long-term priorities and making funding and budget decisions transparent to staff.
- Realizing the 2018 Smithsonian Master Plan and capital projects to support a resilient infrastructure for new programs, audiences, and capacity, ensuring the longevity of the museum building and grounds, offsite storage, collections, and digital assets.
- Developing a strategic budgeting and fundraising plan that aligns our resources to our priorities and goals and explores new approaches, new sources, and new partnerships to achieve them.
- Sharing space, functions, and collections internally, across the Smithsonian, and with other partners. We will be generous with our collective resources and make green choices whenever possible in all aspects of our work.
- Focusing on staff sustainability—including shared knowledge environments, succession planning, retention, training, human resources support, onboarding, growth opportunities, and internal recruiting.
- Deepening and expanding our reach by developing clear and responsible approaches to audience development and nurturing long-term relationships with our visitors, partners, and communities.
- Creating a culture of transparency and standardization in processes, decision-making, and documentation, to promote equity and streamline effective communication.
- Managing and evaluating our collections based on the stories they tell and a rigorous understanding of stewardship as the foundation for collections and storage improvement projects.
- Evaluating projects, initiatives, and programs so they have clear goals and, as appropriate, end dates. We will treat plans as living documents that are constantly referenced and updated, with compulsory and regular check-ins, and consistently measure progress against milestones to share with staff, stakeholders, and the public.

ENACTING THE PLAN

Reaching the ambitious goals outlined in the strategic plan will require an invigorated and transformed internal culture in which we value all who are a part of the museum and the Smithsonian, as well as create and strengthen collaborations with external partners and communities. Each step we take toward enacting the plan in the next ten years will require decisions and difficult choices about priorities, resources, timelines, and staffing. Some of our work will be new, some accelerated, and some revisited and reevaluated. Our decisions will be informed by engagement with our audiences and supported by rigorous research, data, and reflection. A tactical plan will be designed specifically to enact the strategic plan. It will include action items and steps to achieve the goals of the plan.

As we make decisions, we will focus on actions that support our priorities. By approaching our future choices through this new lens, we will be able to make best use of our remarkable resources and assets to become the most accessible, inclusive, relevant, and sustainable public history institution in the nation.

To ensure accountability, the museum will regularly assess this document and the resulting tactical plan. Circumstances, opportunities, and resources will inevitably change over the next decade and require subsequent changes in the tactical plan. Given the complexity of the museum, some decisions will have unforeseen consequences; to address those, our plans must be living documents, revisited and revised over time to best serve our evolving circumstances and those of our audiences.

“By approaching our future choices through this new lens, we will be able to make best use of our remarkable resources and assets to become the most accessible, inclusive, relevant, and sustainable public history institution in the nation.”

GLOSSARY

Accessibility

“Accessibility is giving equitable access to everyone along the continuum of human ability and experience. Accessibility encompasses the broader meanings of compliance and refers to how organizations make space for the characteristics that each person brings.” (AAM, *Facing Change: Insights from AAM’s DEAI Working Group*, 2018)

Best Practices

“Best practices are commendable actions and philosophies that demonstrate an awareness of standards, solve problems and can be replicated.” (From AAM)

The determination of best practices will be revisited and updated at regular intervals to stay up-to-date and inclusive, and result from collaborations with professional organizations, field leaders, partners, and stakeholders.

Capital Projects and Master Plan

The Smithsonian Institution has a set of evolving master plans that direct and prioritize investments in capital projects for the resiliency, reconstruction, and renovation of buildings and spaces on the National Mall and offsite. Currently, the most pressing projects for the museum are the Public Space Renewal Project (PSRP) IV, the lower level mezzanine renovation, and the construction of Pod 6 in Suitland, Maryland.

PSRP IV will tackle the renovation of the museum’s East Wing, with significant implications for exhibit spaces and collections storage. The lower level mezzanine renovation will move staff into enhanced offices, freeing up space on the 4th and 5th floors for the subsequent improvement and decompression of collections storage spaces. Pod 6 will create an up-to-date collections storage space offsite, shared with other Smithsonian units and the National Gallery of Art. The timing for these projects is affected by a number of external variables, but Pod 6 would be first in line, as it could conceivably provide space for collections moved offsite to support PSRP IV.

Decolonization

“Decolonization is the long, slow, painful, and imperfect process of undoing some of the damage inflicted by colonial practices that remain deeply embedded in our culture, politics, and economies. . . . Museums, in their cultural roles of memory keeper, conscience, and healer, have an obligation to provoke reflection, rethinking, and rebalancing. Museums can help us deal with the dark side of history, not just emotionally and personally, but in a way that helps us build a just and equitable society despite our legacy of theft and violence.” (AAM/Center for the Future of Museums, 2019 *Trendwatch*, 22)

“Practices that actively and intentionally undo colonization. In other words . . . approaches to organizing life that are built on justice, equity, multiplicity, and shared authority distributed horizontally.” (NMAH Staff *Deep Dive on Decolonization*)

Demographics

When we refer to demographics in this document, we will use the most current data available, including but not exclusively relying on U.S. Census data, that reflects the U.S. population. We are particularly interested in race, class, ethnicity, geography, and gender as they relate to the makeup of our audiences.

Inclusion

Inclusion is “the intentional, ongoing effort to ensure that diverse individuals fully participate in all aspects of organizational work, including decision-making processes. It also refers to the ways that diverse participants are valued as respected members of an organization and/or community. While a truly ‘inclusive’ group is necessarily diverse, a ‘diverse’ group may or may not be ‘inclusive.’” (AAM, *Facing Change: Insights from AAM’s DEAI Working Group*, 2018)

Language Justice

Language justice is the tenet that all deserve to communicate in a way they feel most comfortable to understand and be understood. This term acknowledges that the museum must move away from using only English to communicate if we are to demonstrate respect to our visitors and to create a space, both in the museum and virtually, where our audiences are able to feel empowered by history.

Public History

“Public history describes the many and diverse ways in which history is put to work in the world. In this sense, it is history that is applied to real-world issues. Public history institutions develop products (exhibitions, books, websites, main streets, archives, tours, concerts, and many more) through excellent scholarship and academic discovery, along with partnerships and shared authority with the publics with which they serve.” (National Council on Public History)

Relevance

Relevance is the extent to which museum activities and collections connect with the issues, concerns, and values that matter to our audiences, including personal meaning-making and practical usefulness. Relevance cannot be imposed and must be born from the needs, interests, and active participation of the publics. As a public history institution, the historical interpretation of primary sources we provide is essential to people’s understanding of themselves as historical actors.

Resilience

“The capacity of social, economic, and environmental systems to cope with a hazardous event, trend, or disturbance, responding or reorganizing in ways that maintain systems’ essential function, identity, and structure while also maintaining the capacity for adaptation, learning, and transformation.” (Intergovernmental Panel on Climate Change, “Glossary,” 2014: *Annex II*: 127

https://www.ipcc.ch/site/assets/uploads/2018/02/AR5_SYR_FINAL_Annexes.pdf)

Sustainability

All aspects of museum practice and policy should be sustainable: we look to the long term as we care for our collections, staff, environment, culture, collaborators and constituents. Sustainability is a function both of matching our goals to our resources and capacity, as well as planning responsibly and accountably as opportunities arise.

History of Mission Statement, Logo and Ordinance Requirements for Birmingham Museum



- From 2001-2015, the museum was known as the **Birmingham Historical Museum & Park**. Following the 2012 strategic planning process, the Museum Board recognized the need to refresh the museum's image and visibility. Following a survey of public opinion in 2016, this included renaming the museum **Birmingham Museum and updating its mission statement**. In 2017, the museum's logo was changed to the version currently being used.
- The ordinance formally creating the museum was adopted by the City Commission in 2011, with amendments to reflect the name change and mission change, which are now formally part of the ordinance language:

(Excerpt) Birmingham Municipal Code, Section 62.II. MUSEUM BOARD

Sec. 62-31. - Powers and duties.

Mission statement. The Birmingham Museum will explore meaningful connections with our past, in order to enrich our community and enhance its character and sustainability. Our mission is to promote understanding of Birmingham's historical and cultural legacy through preservation and interpretation of its ongoing story.

In general, it shall be the duty of the museum board to:

- Collect, arrange, catalogue and preserve historical material including books, pamphlets, maps, charts, manuscripts, papers, records and archives, paintings, statuary and other objects and materials relating to the history of the city and the surrounding area;
- Procure and preserve narratives of the residents of such area;
- Collect material of every description relative to the history, and culture of our Oakland County Native American tribes;
- Collect, prepare and display objects indicative of the life, customs, dress and resources of the residents of this area; and
- Make available from time to time source materials and historical studies relative to and illustrative of the history of the area.

The museum board shall have the power, with the assistance of all city public officials, to collect from the public offices in the city reproductions of any records, files, documents, books and papers which, in the opinion of the museum board are of historical value.

The museum board shall have the power to develop, operate and maintain the 1928 Allen House, 1822 John West Hunter House and John West Hunter Memorial Park, as part of the Birmingham Museum, as a museum and to serve as an advisory authority exercising control and management over this cultural resource.

The museum board shall have the power to raise funds for the exercise of its powers and duties.

(Ord. No. 2005, 1-25-10; Ord. No. 2176, 3-14-16)

ORIGINAL PLAN, FORMULATED 2012



City of Birmingham

Birmingham Historical Museum & Park

2013-2016 Strategic Plan

2013-2016 STRATEGIC PLAN

APPROVALS

Museum Board: February 9, 2013

City Commission: April 22, 2013

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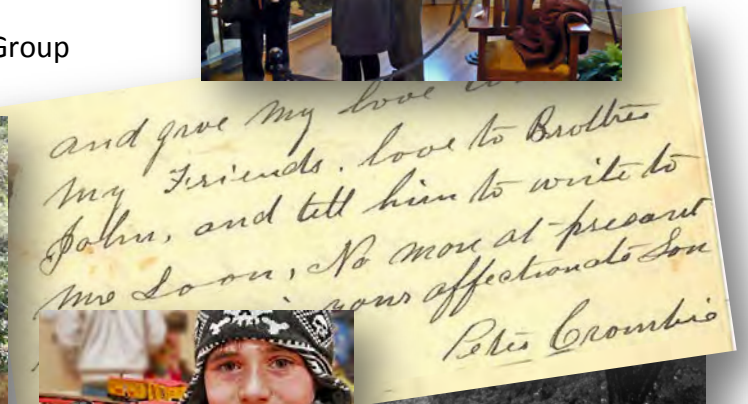
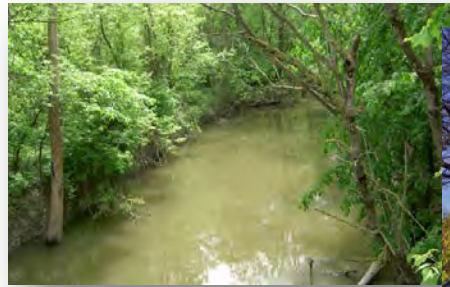


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EXECUTIVE SUMMARY

BACKGROUND AND PROCESS: In 2008, the Birmingham Historical Museum & Park adopted a strategic plan for the period of 2008-2013. It was created as a reflection of the prevailing favorable economic conditions, museum needs, and focus group input. However, during the past five year period, a challenging economy resulted in significant changes to the museum's funding and operations. In addition, an in-depth study was undertaken to assess the museum's collection stewardship (the American Alliance of Museums/Institute of Museum & Library Services Museum Assessment Program, or MAP) and to make recommendations for enhanced collections care. A complete report was provided to the museum in July of 2012.

Accordingly, a comprehensive review and revision of the expiring strategic plan was deemed necessary, and the target time period for the new plan was shortened from five to three years. The Museum Board engaged a consultant to help guide the museum through the process to assure the most efficient and complete bottom-up approach, and to integrate a wide variety of input in the new plan. These included an electronic survey, facilitated focus groups (local cultural organizations, commercial/retail business interests, and schools, families and churches), an open public meeting, and a two-part retreat of major stakeholders composed of city officials, the Museum Board, museum staff, Friends of the Birmingham Historical Museum & Park, and the Baldwin Public Library director.

The resulting 2013-2016 Birmingham Historical Museum & Park Strategic Plan represents this broad effort to respond to community expectations, professional museum standards, the current and anticipated economic climate, and the museum's organizational needs now and in the future.

MISSION AND VALUE: (Changed in 2016) The Birmingham Historical Museum and Park is a unique cultural asset that connects us to our past and brings value to our present and future. Its mission is to foster a greater appreciation and understanding of the Birmingham area's unique heritage by collecting, preserving, cataloguing and exhibiting cultural material relevant to Birmingham's story, and by providing engaging and entertaining educational experiences that promote this story to visitors of all ages.

GOALS: The goals of the strategic plan as identified by planning participants fall into two groups, as follows:

Mission-Related Goals

- Enhance community access, appeal, and engagement, resulting in increased utilization of BHMP and broader appreciation for its cultural contribution to the region (Goal I, p. 6).
- Provide stewardship and management of the museum's collection of artifacts, archives, and buildings, in accordance with established professional museum practice (Goal II, p. 9).

Infrastructure/ Support Goals

- Assure financial stability and sustainability and increase the capacity of BHMP to serve its mission through enhanced fundraising, board development, leveraging relationships and volunteers (Goal III, p.12).
- Define a unified message and marketing plan by using a variety of marketing media to further develop the museum's brand and to increase awareness, interest, and attendance (Goal IV, p. 14).

The Museum Board has the role and responsibility of planning, implementing, and providing oversight of the Birmingham Historical Museum & Park's Strategic Plan.

DEFINITIONS: The following definitions apply to this outline.

Goals: *Goals in this plan state where the organization will focus its energies over a defined time frame. They can be short or long term in nature, depending on the decision of the group. Goals are not necessarily directly measurable but provide a broad view or concept of the priorities established by the organization.*

Objectives: *Objectives in this plan are shorter-term milestones that support the individual goals. Each goal should have at least two objectives that will tangibly move the organization toward reaching that goal. Objectives are concrete, measurable and focused on results.*

Strategies: *Strategies in this plan are specific actions or steps that lead to the accomplishment of the objectives. They are action-oriented, short-term, and include the specific "what, by when and by whom," components.*

Team Leaders: *Those individuals or small teams charged with a coordinating role, keeping the focus of a particular goal on track.*

Goal I: Enhance community access, appeal, and engagement, resulting in increased utilization of BHMP and broader appreciation for its cultural contribution to the region.

- More actively engage the community through programs, events, and other activities
- Create a sense of “place” through experiences, amenities and utilization of the grounds
- Enhance utilization of the buildings and the collection
- Enhance utilization of the park and outdoor space

Goal Team Leaders: Leslie Pielack, Museum Director; Catherine Tuczek, Museum Friends Board

OPPORTUNITIES

Currently,

- BHMP is viewed as a well kept secret
- The museum has limited appeal to our target audiences

We believe we can improve the appeal to current audiences, engage new audiences and increase visitation and participation in the experiences we offer.

THREATS

- Our current vague image in the community
- Limitations in funding, staffing and open hours
- The challenges presented by our location and signage limitations
- The perception that we are not exciting or visitor friendly

If we do not improve our engagement with the community, we run the risk of becoming irrelevant and losing the opportunity to enrich the quality of life in this region. **Our successful attainment of this goal will be evidenced by** an increase in awareness of the museum’s role; an increase in attendance at the museum buildings, park, events, and online; and increased collaboration with local cultural institutions and the business community.

Goal I (con't):

Objective A: Develop and implement strategies and programs that actively engage the community and make history and heritage more relevant in their lives

- A.1** Coordinate annual on site local-history based school tours to meet current school objectives through the Birmingham Public Schools Curriculum Coordinator
- A.2.** Meet quarterly with other cultural organizations to share ideas, develop a cultural calendar for Birmingham and to partner on events and programs
- A.3** Enhance our web presence and utilize technology to engage more actively with visitors
- A.4** Explore the possibility of taking interpretive exhibits to the schools/out to the public
- A.5** Develop an annual “signature event” that draws people to the museum
- A.6** Develop at least one partnership event with the Principal Shopping District each year
- A.7** Explore collaborative approaches with Baldwin Library to document and interpret its historic artifacts

Objective B: Establish the museum and park as a valued destination and place to encourage community connectivity

- B.1** Explore the feasibility of opening the buildings for public and private events or meetings on a restricted basis
- B.2** Make Wi-Fi available in the park and buildings

Objective C: Develop an interpretive plan for both buildings. Enhance utilization of the collection by engaging in dynamic and changing events, activities, programs and exhibits that keep an historical context but draw in more people and encourage returning visitation.

- C.1** Better define our core products at the buildings
- C.2** Clarify our key target audiences
- C.3** For each target audience brainstorm and develop at least one new event, exhibit or program (on site at the museum, or that can be taken to the audience at their location)
- C.4** Enhance exhibits through use of technology and hands-on/dynamic interactive opportunities
- C.5** Enhance signage and exterior appeal

Goal I (con't):

Objective D: Develop and implement an interpretive plan for the park. Better utilize the park to share local heritage, engage visitors, connect them to the museum site, and keep them coming back.

- D.1** Better define our “products” for the park, in conjunction with Parks Dept. staff
- D.2** Enhance the outdoor space and grounds; improve seating and add Wi-Fi
- D.3** Connect to the Rouge River Trail with a resting stop and interpretive information
- D.4** Provide information in the park that increases awareness of the museum buildings and site
- D.5** Explore the feasibility of utilizing the park as an event or music venue

Goal II: Provide stewardship and management of the museum's collection of artifacts, archives, and buildings, in accordance with established professional museum practice.

This goal is necessary to preserve the tangible objects in the museum collection for the future and make them more available through exhibits and other forms of access by the community. It will enable more comprehensive and engaging opportunities to connect to Birmingham with its history.

Goal Team Leaders: Leslie Pielack, Museum Director; Connie Locker, Museum Assistant; Catherine Tuczek, Museum Friends Board

OPPORTUNITIES

These issues were identified as top priorities in the Museum Assessment Program (MAP) report shared with the Museum Board in July, 2012.

Currently, the museum is challenged by the following:

- Inadequate staffing and supplies; lack of effective and appropriate storage for artifacts and archives (e.g., cataloguing an individual item takes 2.5 hours on average; storage is not archival grade or leaves materials vulnerable to risk)
- Incomplete or absent written policies and procedures and ineffective climate and environmental control for the collection
- Incomplete/inaccurate collection records, incomplete digitization, and ineffective organization of the collection that limit utilization and access by staff, researchers, and the general public
- The presence of inappropriate or unnecessary objects in the collection that do not support the mission require professional care but drain needed resources that are needed for the rest of the collection.

We believe that with increased resources, we can improve the overall care of our artifacts through improving our records, storage, and organization, while simultaneously digitizing the collection, making it easier to use and access. Proper safe storage and implementation of protective policies will help ensure the collection will be preserved for the future.

THREATS

- Limited funding for paid professional personnel and museum-grade equipment
- The needs of the collection are not well understood outside the museum staff

If we do not implement changes, the collection will continue to be at risk of environmental damage and irreversible deterioration, misplacement, inaccessibility, or will be rendered otherwise unusable, resulting in the irreplaceable loss of the museum's most valuable assets. **Our successful attainment of this goal will be evidenced by** the reduction of lost, damaged, misplaced, or inaccessible items; an increase in the number of collection items that are safely and properly stored; and improved documentation permitting wider physical and digital access.

Goal II (con't):

Objective A: Improve storage organization and environmental controls

- A.1** Create a storage organization plan based on assessment of the current collection's needs and the available space and storage furniture/supplies
- A.2** Assess environmental conditions and develop a plan to improve or correct deficits

Objective B: Improve efficiency, accuracy, and accessibility of object records and documentation

- B.1** Develop and implement a plan for correction, completion, and updating of existing object records and objects waiting for accession (the formal process to accept objects into a museum collection)
- B.2** Create digital and hard files of object records and develop/enhance finding aids
- B.3** De-accession inappropriate or unnecessary objects in accordance with museum standards and revised museum accession policy and procedures
- B.4** Create digital images of collection items for purposes of documentation and access

Objective C: Develop and implement collections-related policies and procedures for collections management, future acquisitions, de-accessioning, disaster preparedness, the museum's hands-on/use collection, building maintenance, and other collections-related policies and procedures in accordance with accepted museum standards

- C.1** Create appropriate written policies and procedures manuals
- C.2** Integrate policies and procedures with other relevant city departments
- C.3** Develop methods for orienting staff and volunteers to pertinent policies and procedures
- C.4** Review policies and procedures on an annual basis and revise as needed

Objective D: Provide increased digital access through exploring online or other virtual exhibit/access options

- D.1** Develop a virtual exhibit and digital access plan that reflects current museum practices and standards, and reflects the needs of the museum collection and its users and visitors
- D.2** Explore and implement web and other information technology options for improved access

Goal II (con't):

Objective E: Seek professional training opportunities for museum staff to provide ongoing collection management skills development and effectiveness

E.1 Identify training opportunities for paid and unpaid staff to enhance collections care

E.2 Provide opportunities for paid and unpaid staff to attend up to two professional programs per year

Goal III: Assure financial stability and sustainability and increase the capacity of BHMP to serve its mission through enhanced fundraising, board development, leveraging relationships and volunteers.

Goal Team Leaders: Leslie Pielack, Museum Executive Director; Connie Locker, Museum Assistant; George Stern, Museum Board Member; Catherine Tucek, Museum Friends Board Chair

OPPORTUNITIES

Currently,

- BHMP receives approximately 70% of its funding from the city and 30% from donations, grants and other revenue sources, largely made possibly by the work of the Friends of the Birmingham Historical Museum & Park
- City funding has decreased each year since 2009
- Staffing has been reduced from 1 full time Director and 2 part time professionals with paid summer professional interns to 1 part time Director and 1 part time professional

We believe we can increase our fundraising efforts and better leverage our board members, volunteers and partner organizations to increase our ability to serve our mission.

THREATS

- Lack of staff to effectively supervise/ manage volunteers
- Lack of stable/sustainable funding sources
- Continued limited city funding
- Volunteer attrition

If we do not take action on this goal, we severely limit our ability to effectively manage the collection and further engage the public in meaningful ways. It will also impact the number and frequency of exhibits and programs we can offer and limit our ability to implement this strategic plan. **Successful attainment of this goal will be evidenced by** a manageable budget combining both city and outside funding sources; an increase in donations and bequests to the Friends of the Birmingham Historical Museum & Park; an increase in donations to the museum's endowment; and an effective and sustainable board development and volunteer program.

Goal III (con't):

Objective A: As a collaborative effort of the Museum Board and Museum Friends develop a comprehensive fundraising plan for the BHMP (including a “case statement” clarifying the what and why of giving) that increases contributions to both operations and the endowment fund

- A.1** Develop and implement a strategy for increasing planned giving and bequests
- A.2** Develop and implement a strategy for attracting large/major donor contributions
- A.3** Host at least one major fundraising event per year
- A.4** Develop and implement strategies for increasing membership in the Friends to broaden the base from which to enhance annual giving

Objective B: Engage in Board Development by clarifying expectations and further developing the skills of the Museum Board and seeking new members with complementary skills

- B.1** Develop position descriptions and clarify expectations, responsibilities, and authorities
- B.2** Evaluate needed skills, identify opportunities, and develop a plan for identifying appropriate potential Museum Board candidates
- B.3** Create a board development plan including workshops, training programs, etc., for skills refinement including fund raising and effectively leveraging relationships
- B.4** Collaborate and delineate the respective roles of the Friends and the Museum Board

Objective C: Increase the personnel capacity of the organization by increasing professional staffing, leveraging volunteers, and utilizing partner organizations to help staff specific events, exhibits or programs

- C.1** Evaluate skills, expertise, and specific roles needed for effective and efficient operations
- C.2** Increase paid professional staff and hours as appropriate
- C.3** Develop a comprehensive volunteer program that incorporates job descriptions, organizational structure, recruiting and training plans and on-going management of volunteers

Objective D: Initiate a grant-writing effort in conjunction with the Friends to identify key opportunities for collaboration, and develop an account to provide potential matching funds for increased leverage

Goal IV: Define a unified message and marketing plan by using a variety of marketing media to further develop the museum's brand and to increase awareness, interest, and attendance.

Goal Team Leaders: Russ Dixon, Museum Board; Connie Locker, Museum Assistant

OPPORTUNITIES

Currently, BHMP faces several challenges that limit its ability to locate and connect with its audiences, such as:

- lacking a unified message and a recognizable brand
- being under-marketed
- having limited staff resources to build and maintain the museum's presence in the community
- having poor signage that contributes to confusion regarding the museum's location and hours of operation
- not having on-site parking

We believe we can improve the current environment by developing and clarifying our message and to increase awareness of the museum and its services to a wider audience.

THREATS

- lack of expertise and financial resources
- competition with other local organizations for patronage of events and programs
- lack of a local central advertising mechanism to get the word out to the community

If we do not take action on these issues, our exhibits, events, and programs will continue to be under attended, and the community will be unable to take full advantage of everything the museum has to offer to enhance quality of life. Important opportunities for community engagement will be missed. Without proactive change, the disconnection between the greater community and the Museum will increase over time, making improvement even more difficult in the future. **Successful attainment of this goal will be evidenced by** a clearly recognized brand for Birmingham Historical Museum & Park; improved image; increased media and communications coverage; increased attendance at the museum, online, at events, and in the park; and an increased understanding of Birmingham's history and heritage.

Goal IV (con't):

Objective A: Identify and utilize free and low-cost marketing resources maintained by specific target audiences, such as city publications, local schools, senior groups, and other community organizations.

Objective B: Identify our key audiences and explore and enhance the image the museum presents to the public through independent and collaborative projects and partnerships that strengthen our ties to the community

Objective C: Develop a Marketing Plan to clarify the museum's message and brand, utilizing survey data, innovative marketing strategies, low cost resources and micro-marketing concepts.

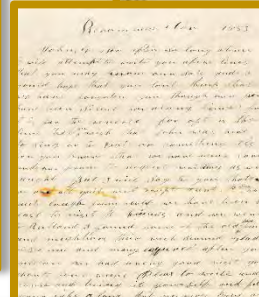
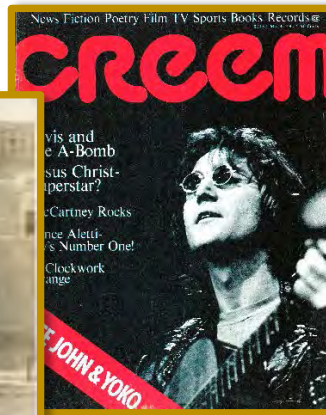


City of Birmingham



THE
BIRMINGHAM
MUSEUM

2021-2024 Strategic Plan



2021-2024 STRATEGIC PLAN

APPROVAL/ACCEPTANCE

Museum Board Approval: September 3, 2020

City Commission Acceptance: September 14, 2020



CONTRIBUTORS

Museum Director: Leslie Pielack

Museum Board Members: Russell Dixon, Dan Haugen, Pat Hughes, Judith Keefer, Tina Krizanac, Marty Logue, Caitlin Rosso

This plan represents an update and revision of the 2017-2020 Birmingham Museum Strategic Plan



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INTRODUCTION

BACKGROUND AND PROCESS: In 2012, the Birmingham Museum (formerly Birmingham Historical Museum & Park) adopted a strategic plan for the period of 2013-2016. It was created with input from city staff and officials; the public; local churches, schools, and other cultural organizations; and major stakeholders such as the Friends of the Birmingham Museum. The resulting **2013-2016 Strategic Plan** also incorporated the findings of a **2012 Museum Assessment Program** report, a grant-funded audit and review of the museum's collection provided by the American Alliance of Museums/Institute of Museum & Library Services. The final strategic plan represented a broad effort to respond to community expectations, professional museum standards, and the museum's needs in a changing cultural environment. It emphasized changes in the museum field toward community engagement and the human stories that relate to the physical objects in the collection. Also emphasized was the expansion of public access to the collection, educational goals, and continued acquisition and care for the objects that tell Birmingham's story (including contemporary materials). The plan included objectives relating to the landscape, site improvements, and interpretation of the historic buildings. Re-branding the museum and broadening its visibility were also significant objectives.

The **2017-2020 Birmingham Museum Strategic Plan** revised and modified the goals and objectives based on changing technology and audience needs as objectives from the first plan were met or obsolete. The museum has made considerable progress towards the initial goals set by its first strategic plan and revision. As a result, additional review and updating of the plan by the Museum Board has been undertaken for 2021-2024.

The newly revised goals and objectives that follow in the **2021-2024 Birmingham Museum Strategic Plan** represent a careful consideration of the impact of the COVID-19 pandemic on current and future activities, especially virtual content and technological means of enhancing audience virtual experience. The Museum Board expects these adaptations to continue for some time, and they are reflected in the revised plan for 2021-2024. However, the ultimate goals and mission of the Birmingham Museum remain largely unchanged, while the methods of accomplishing established objectives continue to be flexible.

MISSION AND VALUE: The museum's mission statement reflects an inclusive and contemporary approach to integrating Birmingham's history in meaningful ways for its audiences, strengthening its value to the community and its long term sustainability.

The Birmingham Museum will explore meaningful connections with our past, in order to enrich our community and enhance its character and sustainability. Our mission is to promote understanding of Birmingham's historical and cultural legacy through preservation and interpretation of its ongoing story.

OVERVIEW

The **2021-2024 Birmingham Museum Strategic Plan** builds on the preceding plan, which continues to provide relevant overall direction.

Goals and their objectives form two different groups; 1) those related to the public service functions of the museum, and 2) those related to strengthening capacity and resources to carry out its mission.

Following the summarized description of goals and objectives, the updated 2021-2024 plan is presented in table format as a quick reference guide. As with previous versions, the 2021-2024 Strategic Plan is a living document whose purpose is to provide direction and guidance. Ongoing modification is expected as changing needs dictate. The Museum Board has the role and responsibility of reviewing and making recommendations for plan modification.

DEFINITIONS: The following definitions are used in this document.

Goals: Goals in this plan state where the organization will focus its energies over a defined time frame. They can be short or long term in nature. Goals are not necessarily directly measurable but provide a broad overview or concept of the priorities established by the organization. Goals establish general direction.

Objectives: Objectives in this plan are shorter-term milestones that support individual goals. Each goal has several tangible objectives that will move the museum toward reaching that goal. Objectives are concrete, measurable and focused on results.

Tasks/Strategies: Strategies or tasks in this plan are specific actions or steps that lead to the accomplishment of the objectives. They are action-oriented, short-term, and include the specific “what, by when and by whom,” components.

GOALS and OBJECTIVES

1) **Service and Mission-Related Goals**

Goal I: Enhance community engagement through improved access and appeal, resulting in increased utilization of the Birmingham Museum and broader appreciation of its cultural contribution.

Objectives for Goal I:

- A. Develop and implement programs that strategically engage and connect with the community to make history and heritage more relevant.
- B. Establish the museum and park as a valued resource and place to encourage community connectivity.
- C. Enhance utilization of the collection by developing an interpretive plan for the site to engage visitors in impactful events, activities, programs and exhibits.
- D. Continue to create content to promote the museum through social media and marketing.

Goal II: Provide stewardship and management of the museum's collection of artifacts, archives, and buildings, in accordance with established professional museum practice.

Objectives for Goal II:

- A. Improve museum collection's storage organization and environmental controls to protect and preserve the collection.
- B. Improve efficiency, accuracy, and accessibility of collection object records and documentation.
- C. Develop and implement collections-related policies and procedures for collections management; future acquisitions; de-accessioning; disaster preparedness; the museum's hands-on/use collection; building maintenance; and other collections-related policies and procedures in accordance with accepted museum standards.
- D. Provide increased digital access through exploring online or other virtual exhibit/access options.

2) **Capacity-Building and Support-Related Goals**

Goal III: Increase the capacity of the Birmingham Museum to serve its mission through fundraising, board development, building relationships, and volunteer resources.

Objectives for Goal III:

- A. Develop a comprehensive fundraising plan for the Birmingham Museum that increases contributions to both operations and the endowment fund as a collaborative effort of the Museum board and Museum Friends.
- B. Continue to support board development.
- C. Increase the personnel capacity of the Birmingham Museum by increasing professional staffing, engaging volunteers, and utilizing partner organizations.
- D. Enhance funding through grant-writing efforts.

Goal IV: Continue to develop the museum's brand to increase awareness, interest, and attendance through a consistent message and marketing plan.

Objectives for Goal IV:

- A. Continue to maximize low cost marketing resources.
- B. Strengthen our ties to the community by identifying our new/existing audiences and enhancing the museum's image.
- C. Explore best practices in marketing the new face of the museum.

DETAIL OF OBJECTIVES, TASKS, AND TIMELINES

GOAL 1: Enhance community engagement through improved access and appeal, resulting in increased utilization of the Birmingham Museum and broader appreciation of its cultural contribution.

Objectives for Goal 1

A. Develop and implement programs that strategically engage and connect with the community to make history and heritage more relevant.

<i>Task</i>	<i>Who</i>	<i>Resources</i>	<i>Timeline</i>
1. Public programming; schools, organizations, individuals & families	1. Museum staff	1. Personnel; materials/operational funds	1. Ongoing
2. Private programs & tours	2. Museum staff	2. Personnel; materials/operational funds	2. Ongoing
3. Research services	3. Museum staff	3. Personnel; materials/operational funds	3. Ongoing

B. Establish the museum and park as a valued resource and place to encourage community connectivity.

<i>Task</i>	<i>Who</i>	<i>Resources</i>	<i>Timeline</i>
1. Continue and enhance social media audience interaction	1. Museum staff	1. Personnel; operational funds/virtual resources	1. Ongoing
2. Online events promotion	2. Museum staff	2. Personnel; operational funds/virtual resources	2. Ongoing
3. Phased landscape construction	3. City/museum staff	3. Personnel, consultants, funding (city/private)	3. 2021-2024

C. Enhance utilization of the collection by developing an interpretive plan for the site to engage visitors in impactful events, activities, programs and exhibits.

<i>Task</i>	<i>Who</i>	<i>Resources</i>	<i>Timeline</i>
1. Implement Hunter House interpretive plan	1. Museum staff	1. Personnel	1. Ongoing
2. Develop Allen House interpretive plan	2. Museum staff/Board	2. Personnel	2. 2021-22
3. On site, off site, and virtual exhibits	3. Museum staff	3. Personnel, operational funds/virtual resources	3. Ongoing

D. Continue to create content to promote the museum through social media and marketing.

<i>Task</i>	<i>Who</i>	<i>Resources</i>	<i>Timeline</i>
1. Continue and enhance existing social media content and development of the museum's brand	1. Museum staff	1. Personnel, virtual resources	1. Ongoing

GOAL II: Provide stewardship and management of the museum’s collection of artifacts, archives, and buildings, in accordance with established professional museum practice.

Objectives for Goal II

A. Improve museum collection’s storage organization and environmental controls to protect and preserve the collection.

<i>Task</i>	<i>Who</i>	<i>Resources</i>	<i>Timeline</i>
1. Re-organize storage in keeping with permanent and use collection goals	1. Museum staff	1. Personnel; materials/operational funds	1. Ongoing
2. Improve environmental controls	2. Museum staff	2. Personnel; materials/operational funds	2. Ongoing
3. Develop artifact assessment & intervention plan	3. Museum staff	3. Personnel; materials/operational funds	3. 2021

B. Improve efficiency, accuracy, and accessibility of collection object records and documentation.

<i>Task</i>	<i>Who</i>	<i>Resources</i>	<i>Timeline</i>
1. Continue digitization, improvement of digital records and expansion of electronic storage	1. Museum staff; interns/volunteer professionals	1. Personnel; operational funds/virtual resources	1. Ongoing

C. Develop and implement collections-related policies and procedures for collections management; future acquisitions; de-accessioning; disaster preparedness; the museum’s hands-on/use collection; building maintenance; and other collections-related policies and procedures in accordance with accepted museum standards.

<i>Task</i>	<i>Who</i>	<i>Resources</i>	<i>Timeline</i>
1. Finalize/implement disaster preparedness plan	1. Museum staff/city staff	1. Personnel	1. 2021-ongoing
2. Develop a building and grounds maintenance schedule	2. Museum staff/city staff	2. Personnel, operational funds	2. 2021-ongoing
3. Develop/finalize collections policy	3. Museum staff/Board	3. Personnel	3. 2021-2022

D. Provide increased digital access through exploring online or other virtual exhibit/access options.

<i>Task</i>	<i>Who</i>	<i>Resources</i>	<i>Timeline</i>
1. Expansion of digital collections/digital content management for public access	1. Museum staff	1. Personnel, virtual resources	1. Ongoing

Goal III: Increase the capacity of the Birmingham Museum to serve its mission through fundraising, board development, building relationships, and volunteer resources.

Objectives for Goal III

A. Develop a comprehensive fundraising plan for the Birmingham Museum that increases contributions to both operations and the endowment fund as a collaborative effort of the Museum board and Museum Friends.

<i>Task</i>	<i>Who</i>	<i>Resources</i>	<i>Timeline</i>
1. Develop a fundraising plan for seeking and managing contributions from public and private sources	1. Museum staff/city staff/partner organizations	1. Personnel; materials/operational funds	1. Ongoing

B. Continue to support board development.

<i>Task</i>	<i>Who</i>	<i>Resources</i>	<i>Timeline</i>
1. Explore/provide opportunities for continuing education	1. Museum Board; Friends Board	1. Personnel; operational funds/virtual resources	1. Ongoing

C. Increase the personnel capacity of the Birmingham Museum by increasing professional staffing, engaging volunteers, and utilizing partner organizations.

<i>Task</i>	<i>Who</i>	<i>Resources</i>	<i>Timeline</i>
1. Maintain appropriate staffing levels and effective use of personnel resources	1. Museum staff/professional volunteers/interns	1. Personnel; partner organizations	1. 2021-ongoing

D. Enhance fundraising through grant-writing efforts.

<i>Task</i>	<i>Who</i>	<i>Resources</i>	<i>Timeline</i>
1. Identify/explore grant opportunities for supporting museum initiatives	1. Museum staff	1. Personnel; partner organizations	1. Ongoing

Goal IV: Continue to develop the museum's brand to increase awareness, interest, and attendance through a consistent message and marketing plan.

Objectives for Goal VI

A. Continue to maximize low cost marketing resources.

<i>Task</i>	<i>Who</i>	<i>Resources</i>	<i>Timeline</i>
1. Explore/develop low cost marketing opportunities to complement social media marketing	1. Museum staff	1. Personnel; materials/operational funds	1. Ongoing

B. Strengthen our ties to the community by identifying our new/existing audiences and enhancing the museum's image.

<i>Task</i>	<i>Who</i>	<i>Resources</i>	<i>Timeline</i>
1. Explore/enhance relationships with local and virtual organizations	1. Museum staff/ Museum Board	1. Personnel; partner organizations	1. Ongoing

C. Explore best practices in marketing the new face of the museum.

<i>Task</i>	<i>Who</i>	<i>Resources</i>	<i>Timeline</i>
1. Maintain and explore continuing education in museum marketing and branding	1. Museum staff	1. Personnel	1. Ongoing



**American
Alliance of
Museums**

Pledge of Excellence

pledges that, in fulfillment of our educational mission,
we will strive to operate according to national standards and best practices
to the best of our abilities and in accordance with our resources.

Leslie Pielack, Museum Director 1/13/2013

Russell Dixon, Chair, Museum Board 1/13/2013



Director Report

DATE: December 5, 2024
TO: Museum Board
FROM: Leslie Pielack, Museum Director
SUBJECT: Director Report

Allen House Ceiling Repair—The repair to the Allen House ceiling is pending, but the good news is that the damage is not due to moisture intrusion, but rather to the weight of the plaster itself pulling out the original nails into the lath, which were too short to support the weight over more than a century. The repair options are being considered and we hope to complete repairs in the next few weeks. Until then, only half of the museum is open to visitors, although people have been very happy to view the exhibit area that is visible.

CDBG-funded Pond Phase 3—Before we can issue a RFP for the planned Pond area ADA Paths and Boardwalk, a permit must be submitted to EGLE, who need to review whether the project will meet requirements related to the wetlands area around the pond. Their review may take several months, and until we get their response, we won't be able to complete or issue an RFP for the work. Stay tuned!

Upcoming Committee Recommendations and Final Reports--The Aging in Place, Birmingham Sustainability, and Historic Preservation Plan documents that are in the final stages of adoption may have implications for the Museum's strategic plan. The plans should be complete by our January or February Museum Board meeting, so that information will be available for review as part of our process.

Programs—There will be no public lecture at the Baldwin Library in December. The next program in January will be presented by Caitlin Donnelly and is entitled, "Literal Train Wrecks." She will discuss some of the major transportation disasters that have occurred in the Birmingham area and how the community responded to them.

Planning for America's 250th Anniversary: Museum staff have started looking at ways that we can incorporate the 250th anniversary into our programming, exhibit planning, and special tours. There will be more to come, as we haven't settled on anything yet and we still have a year to plan.

Collections Updates: We have been working hard to digitize a number of personal items from the Quarton family that they have agreed to loan us through the end of the year. The items span several generations and include photographs, diaries, letters, and other documents relating to the day to day life of the Quartons, Blakeslees, Beardslees, Durkees, Coryells, Masters, and Daniels family.

Also, DPS located the mislaid Flint Faience & Tile fireplace hearth from Barnum School that we have been wondering about since we installed the main fireplace in 2011. The hearth tile was extracted piece by piece and includes two animal design tiles. The tiles have been moved to their new home in the basement of the Hunter House, and museum staff will be working with Engage Birmingham after the New Year to tell the story of the fireplace and feature one of the animal tiles with an Engage project to invite residents to name the animal. What kind of animal is it? You will have to wait to find out!