

**Strategic Plan**  
**Morrison County Historical Society**  
May 2017

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**I. Background**

The MCHS Strategic Planning Ad-hoc Committee began developing this Strategic Plan in May 2016, with a series of periodic meetings. Committee members included the following:

Michael Burr, John Hamerlinck, Duane Welle, Lee Obermiller, Stan Wielinski, Ann Marie Johnson, Mary Warner

The Committee's work focused on numerous strategic issues and factors affecting MCHS's plans and operations. In the process, the Committee produced the following:

- **Strategic Vision Statement:** The Committee consulted the MCHS Board and developed a brief summary of MCHS's strategic vision, intended to clarify and expand upon the MCHS mission statement and provide high-level guidance for the Committee's activities.
- **Strategic Goal Areas:** The Committee identified current MCHS priorities and categorized those priorities in five areas for further development to develop specific goals.
- **Monetary Resource Goals:** The Committee established monetary goals based on growth in all revenue areas. *NOTE:* These goals were *not* intended to establish budgets required to achieve all identified strategic goals, but rather to establish realistic monetary objectives and guide development planning and funding strategies.
- **Qualitative Goals:** The Committee identified and described strategic priorities in all five goal areas.
- **Goal Priorities:** The Committee prioritized the identified goals according to importance within each goal area, and organized the prioritized goals according to immediacy and logical order of execution.

It was noted through the planning process that having adequate staffing is a primary means for achieving other goals within the strategic plan. Due to the recent reduction in staff hours, the goal to reinstate adequate staffing has become urgent.

**II. Strategic Vision Statement:** The Morrison County Historical Society is dedicated to a strategic vision that includes the following benefits to serve the public good:

- *Shared Cultural Heritage:* Helping people engage with history, so that we all may better understand our shared cultural heritage and its importance today.
- *Engage, Educate, and Inspire:* Providing programs and facilities to connect, educate, and inspire the people of Morrison County and the larger community.

- *Diverse Perspectives*: Documenting and reflecting the value of diversity in our culture, and sharing diverse perspectives on history.
- *Revelation and Elevation*: Establishing a context for elevation of the human spirit, through open and honest revelation of history and the fruits of human creativity and freedom.

### III. Strategic Goal Areas:

1. Resources
2. Buildings & Grounds
3. Programs
4. Visibility & Public Communications
5. Processes & Systems

### IV. Strategic Goals:

#### 1. Resources

*Qualitative Goal*: Ensure MCHS resources are adequate and sustainable to fulfill MCHS mission and realize the organization's vision.

*Resource Goal Sub-Areas*:

- a. Monetary Resource Goals
- b. Staffing Resource Goals
- c. Qualitative Staffing Goals
- d. Collections Goals

#### 1a. Monetary Resource Goals

Source	Starting	1 year	1 yr % Increase	5 years	5 yr % Increase
<b>County Allotment</b>	46,200	50,820	10%	80,500	74%
<b>Donations</b>	31,000	34,100	10%	32,500	5%
<b>Grants</b>	10,000	10,000	0%	10,000	0%
<b>Endowment</b>	50,000	52,500	5%	200,000	300%
<b>Earnings</b>					
<b>Membership Dues</b>	5,200	6,760	30%	15,000	188%
<b>Merchandise Sales</b>	1,000	1,100	10%	1,600	50%
<b>Research Services</b>	1,500	1,500	0%	1,500	0%
<b>Savings &amp; Interest</b>	200	200	0%	200	0%
<b>Projects &amp; Events</b>	3,000	3,000	10%	5,000	67%
<b>Sponsorships</b>	0	3,000	NA	10,000	333%
<b>Miscellaneous</b>	612		0%		0%
<b>Income</b>					
<b>TOTAL INCOME</b>	148,712	162,980	10%	356,300	140%
<b>Endowment Total</b>	1,000,000	1,050,000	5%	4,000,000	300%

*1b. Staffing Goals*

<b>TITLE</b>	<b>Current Hrs/Wk</b>	<b>1 Yr Goal Hrs/Wk</b>	<b>5 Yr Goal Hrs/Wk</b>
<b>Executive Director</b>	25	35	TBD
<b>Curator</b>	30	35	TBD
<b>Program Director Museum</b>	0	0	TBD
<b>Assistant Registrar</b>	0	0	TBD
<b>Archivist</b>	0	0	TBD
<b>Office Assistant</b>	15	20	TBD
<b>Custodian</b>	6	10	TBD
<b>Volunteers*</b>	12	20%	22%
<b>TOTAL HOURS</b>	<b>76</b>	<b>120</b>	<b>0</b>
<b>FTE</b>	1.9	3.5	0

\*Excluding Board Members in their regular Board duties.

*1c: Qualitative Staff Goals:*

Most staff positions require certain basic competencies. ~~GOAL~~The goal is to ensure all staff members that need these competencies are adequately equipped and prepared to use them.

- Organizational skills
- Ability to communicate (verbal and written)
- Customer service and interpersonal communications
- IT (general and specialized IT skills as needed to meet organizational goals)
- Social media management and communication
- Audio-visual content development and production
- Ability to innovate, plan, and anticipate trends (forward-thinking)
- Identify and engage outside resources to support staffing goals
- Upon revision consider needs for competencies to accomplish goals in other areas.

*1d: Collection & Content Goals:*

- Gather contemporary and everyday artifacts to serve organizational mission of reflecting everyday life in Morrison County.
- Survey collection to identify special sub-collections worthy of program focus and visibility efforts.
- Perform gap analysis to identify needs and shortcomings (time periods and artifact types), and develop strategy to address those gaps.
- Perform de-accession of artifacts in the collection that no longer serve organizational goals.
- Identify existing and develop new content resources for program focus, distribution, and income potential.

**2: Buildings & Grounds**

*Qualitative Goal:* Ensure MCHS buildings and grounds are adequate to serve the MCHS mission and support fulfillment of MCHS strategic goals.

*Strategic Objectives:*

- Establish sustainability goal to guide all elements of organizational mission.
- Commission and perform cultural landscape report including Section 106 survey re: archeologically significant activity and implement recommendations.
- Riverbank erosion – Develop funding and implementation plan for mitigation solution (riprap), and execute plan.
- HVAC replacement – Determine needs and solutions, develop funding and implementation plan, and execute plan.
- Building maintenance issues – Prioritize needs identified in Contegrity report and develop plan and schedule to execute.
- Commission and perform historic structures report and implement recommendations.
- Storage requirements and assets – Review storage needs and capacities, and develop plan to revise and upgrade to meet organizational requirements.
  - o How to best use current storage space
  - o How to plan for growth in collections

### **3: Programs**

*Qualitative Goal:* Ensure MCHS programming serves the MCHS mission and supports fulfillment of its strategic goals.

*Strategic Objectives:*

- Apply best practices for research, outreach, and creativity to develop outstanding new programming on an ongoing basis
- Review existing and past programming to inform new programming plans and opportunities
  - o Identify and maintain successful, replicable, and evergreen programming and approaches
- Expand program coverage and access to serve the entire county
  - o Implement events in locations around the county (including traveling exhibits)
  - o Develop programming and exhibits that address various parts of the county (in museum and online)
- Improve use of collections in programming
  - o Mining existing collections for unique exhibits and programming
  - o Review and revise existing exhibits for new programming and display approaches
- Develop and offer online and mobile app programming and exhibits
  - o Produce video(s) on county history and museum process topics
  - o Produce online paid content and transaction/paywall system
- Partner with other sources of content, programming, and technology to produce content
  - o Guest lecturers and historians
  - o Short-term partnership exhibits
  - o Use of shared tools to augment programming (e.g., SCSU 3D scanner)
- Develop and offer programming that can be used for continuing education credits
  - o Research and implement approaches to attain CEU certification
  - o Create and offer formal paid classes eligible for CEUs
  - o Address gaps in continuing education offerings available in the market

#### **4: Visibility & Public Communications**

*Qualitative Goal:* Plan, develop, and execute public visibility and communications to serve MCHS mission and strategic goals.

*Strategic Objectives:*

- Systematically promote existing and new content and programming
  - o Reflect and promote strategic plan through branding materials and activities
  - o Optimize outreach practices
    - o Review and improve outreach channels, processes, and practices
    - o Identify baseline visibility performance and set growth goals
      - Online, social media
      - Newsletter distribution and content
      - Mass media (radio, TV)
    - o Community events and affinity promotions
    - o Research referrals and reciprocation: Engagement with colleagues and organizations to arrange and perform mutual promotion and support as appropriate
- Recruit and support MCHS board members and friends to evangelize programming and services among personal contacts
  - o Include visibility and communications in board training
  - o Provide content and communications tools to board members and friends
- Develop countywide visibility opportunities and tools

#### **5: Processes & Systems**

*Qualitative Goal:* Ensure processes and systems are adequate to efficiently and effectively serve the MCHS mission and strategic goals.

*Processes & System Sub-Areas*

- a. Board Processes
- b. Collections-Related Processes
- c. Administrative Processes
- d. Operations Processes

*Strategic Objectives:*

##### **5a. Board Processes**

- o Establish, update, and implement processes for:
  - Reviewing board and committee membership to identify strengths and limitations
  - Recruiting board and committee members to ensure adequate skills and capacities
  - Ensuring board representation from around the county
  - Reviewing and updating board functions, duties, and practices

##### **5b. Collections-Related Processes:**

- o Review and revise collections policies to accommodate organizational mission, and building constraints and goals.
- o Review and revise cataloguing and records management processes and systems, including collections inventory software tools (Past Perfect).

5c. Administrative Processes:

- Establish, update, and implement processes for:
  - Reviewing and updating personnel manual
  - Regular personnel review process, coordinated with annual budgeting and salary processes
  - Finance procedures manual and processes
  - Identifying maintenance priorities and budgeting needs
  - Providing information and tools to board and committee members

5d. Operations Processes

- Establish, update, and implement processes for:
  - Ensuring building and staff safety and security
  - Managing and using natural resources efficiently and sustainably
  - Ensuring adequate maintenance and custodial functions
  - Reviewing and updating disaster plan

**V. Prioritization of Strategic Goals**

*Key to Prioritization:*

Priority 1:

- Requires a plan
- Immediate need for progress

Priority 2:

- Requires a plan
- No immediate need for progress

Priority 3:

- Does not require a plan at this time
- Optional

*Strategic Goal Prioritization, Order, and Revenue Potential:*

<b>Goal Description</b>	<b>Priority</b>	<b>Order</b>	<b>Revenue Potential</b>
<b>RESOURCE GOALS</b>			
Monetary Resource Goals	1	1	X
Staffing Goals	1	2	
Collection & Content Goals	2	1	X
Qualitative Staff Goals	2	2	
<b>BUILDINGS AND GROUNDS</b>			
Sustainability goals	1	1	
HVAC replacement	1	2	
Riverbank erosion (inc. Sec 106)	1	3	
Building maintenance issues	2	1	
Historic structures report	2	2	
Storage requirements and assets	2	3	
<b>PROGRAMMING GOALS</b>			
Partner with other sources	1	1	X
Expand coverage of entire county	1	2	X
Improving use of collections	1	3	X
Online and mobile app programming	1	4	X
Review programming to inform new programming	2	1	X
CEU credit programming	2	2	X
Best practices for new programming	3	1	X
<b>VISIBILITY &amp; OUTREACH GOALS</b>			
Systematically promote programming	1	1	X
Recruit and support evangelism	1	2	X
Countywide visibility	1	3	X
<b>PROCESS GOALS</b>			
Board Processes	1	1	X
Admin Processes-Personnel manual & review	1	2	
Collections-Related Processes	2	1	
Admin Processes-Other	2	2	
Operations Processes	2	3	

## VI. Executing the Strategic Plan

The Strategic Planning Committee discussed but did not define methodologies for executing the strategic plan, concluding that such execution is outside the Committee's scope. However, the Committee offers the following guidance as MCHS Board and staff members work to execute the plan:

- *Need for metrics and accountability:* Many of the goals identified herein represent qualitative rather than quantitative accomplishments. However, progress on all goals must be measurable in order for MCHS management to gauge the success of execution efforts. The Committee recommends that execution of each goal should include, at the outset, definition of milestones toward achievement, and internal methodologies for periodic review and guidance.
- *Budgeting and monetary goal-setting:* As noted above, the Committee established monetary goals based on growth in all revenue areas, rather than establishing goals based on funds required to execute the Strategic Plan. The Committee recommends that execution of each goal should include, at the outset, funding requirements and funding strategies for achieving each strategic objective.
- *Project and Program Management:* The Committee discussed but did not define project and program management frameworks that may support efficient execution of all strategic goals. At a minimum, the Committee recommends establishing a detailed Work Breakdown Structure and Schedule for achieving priority goals, and applying standard management methodologies to track and guide progress.
- *Strategic Plan Review:* The Committee recommends reviewing the overall Strategic Plan periodically to gauge progress and implement changes as needed. As part of execution planning, MCHS Board and staff members should determine the frequency and approach to such periodic reviews.

**END OF STRATEGIC PLAN**