Strategic Plan
Morrison County Historical Society
January 2022 – Final Update

Contents:

I. **Background**

Using the 2017 MCHS Strategic Plan as a starting point, the MCHS Strategic Planning Committee met periodically throughout 2021 to update and produce this Strategic Plan to guide MCHS for the next three years (2022-2025). Committee members included the following:

Michael Burr, John Hamerlinck, Dave Buker, Mike Worcester, Camille Warzecha, Grace Duxbury, 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 discussed and updated the following:

- **Strategic Vision Statement:** The Committee reviewed and updated the Strategic Vision Statement below.
- **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, reorganizing each revenue source to prioritize by the potential for realistic growth. *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 the primary means for achieving other goals within the strategic plan. MCHS continues to operate without sufficient staff, so implementation for certain goals may take longer than MCHS would like.

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 Context:* Revealing stories from the past that haven't yet been told and providing context for how the history of our area continues to impact people today.

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
County Allotment	54,000	64,000	20%	80,460	49%
Sponsorships	0	1,000	NA	5,000	500%
Membership Dues	5,200	6,760	30%	15,000	189%
Donations/Cultivating Gifts	31,000	34,100	10%	45,000	45%
Contract Services	15,000	16,500	10%	25,050	67%
Grants	10,000	10,000	0%	10,000	0%
Endowment Earnings	51,000	53,000	3%	59,652	17%
Research Services	1,500	1,725	15%	2,550	70%
Projects & Events	1,500	2,000	10%	5,000	67%
Merchandise Sales	1,000	1,000	0%	1,200	20%
Savings & Interest	200	200	0%	200	0%
Miscellaneous Income	500		0%		0%
TOTAL INCOME	170,900	190,285	10%	249,112	140%

| **Endowment Total** | 1,596,000 | 1,675,800 | 5% | 1,940,000 | 22% |

Increasing revenue is the highest priority goal for the Morrison County Historical Society. During committee meetings to update this plan, this goal was mentioned over and over as the one that other parts of the plan depend on for implementation.

For the 2021/22 update of the Strategic Plan, the committee reordered monetary resource goals to show which income streams the organization should prioritize in raising funds. The committee also added Contract Services based on the fact that MCHS is serving as the Central Minnesota Education Coordinator for Rethos: Places Reimagined.

Once the organization builds sufficient cash reserves to weather cash flow irregularities, MCHS can turn its attention to increasing the principal of its endowments. The Finance & Personnel Committee and Board of Directors should set targets for operating reserves and capital improvement reserves.

1b. Staffing Goals

TITLE	Current Hrs/Wk	1 Yr Goal Hrs/Wk	5 Yr Goal Hrs/Wk
Executive Director	33	33	33
Preservationist/Curator	35	35	32
Museum Assistant	25	32	32
Custodian	6	10	20
Registrar*	11	11	32
Development Director	0		TBD
Program Director	0		TBD
Archivist	0		TBD
TOTAL HOURS	**110**	**123**	**149**
FTE	3.43	3.84	4.66

*A part-time, temporary registrar was hired in 2021 through a 1-year Musser Fund grant.

1c: Qualitative Staff Goals:
With a limited number of staff at the museum, the knowledge and skills each brings to the organization are critical to the museum's operation. When a staff member is missing temporarily or leaves permanently, MCHS will be left with a gap in organizational capabilities until someone has been trained to fill them. To minimize these gaps, MCHS needs to identify critical operations and cross-train to create staff redundancies for handling these operations. Investigating shared leadership is one possible tactic for creating staff redundancies for critical operations.

Priority staff goals:
- Add health insurance as a staff benefit
- Make museum assistant a full-time position
- Increase custodian's hours
- Make the registrar position full-time and permanent

- Add a development director
- Add a program director
- Add an archivist
- Create job descriptions for current staff and for the staff we would like to add
- Investigate methods of shared leadership
- Encourage professional development

1d: Collection & Content Goals:
- Process collections-in-waiting in order to make these collections items more accessible to the public and to determine what is currently in the collection. This will assist with gap analysis and reveal further limitations on space within the collections areas.
- Analyze space within the museum to assist in determining limitations that must be placed on collecting artifacts and archival materials.
- Perform gap analysis to identify needs and shortcomings (time periods and artifact types), and develop strategy to address those gaps.
- Deaccession artifacts in the collection that no longer serve organizational goals.
- Set priorities for conservation and preservation of existing collections.
- Create policies and procedures for digital collections.
- Gather artifacts and archival materials to serve organizational mission of reflecting everyday life in Morrison County with consideration for identified gaps and collecting limitations.
- Survey collection to identify special sub-collections worthy of program focus and visibility efforts.
- 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 and execute plan.
- HVAC loan – Find ways to pay this off more quickly.
- Building maintenance issues – Reprioritize needs identified in Contegrity report, add any new maintenance issues that have arisen, and develop plan and schedule to execute.
- Nominate museum property to the National Register of Historic Places.
- Storage requirements and assets – Review storage needs and capacities, and develop plan to revise and upgrade to meet organizational requirements. See also section *1d. Collection & Content Goals*.
  - 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. Consider whether certain MCHS activities need to be dropped in light of resource limitations.
  - o Create a spreadsheet of programming MCHS provides. Include not just exhibits and events, but research services (genealogy, property, business, etc.) and preservation programming we provide.
  - o Identify and maintain successful, replicable, and evergreen programming and approaches
  - o Increase the number of exhibits MCHS produces.
- Expand program coverage and access to serve the entire county
  - o Implement events in locations around the county (including small traveling exhibits, look at libraries and businesses as potential sponsors & hosts)
  - o Develop programming and exhibits that address various parts of the county (in museum and online)
  - o Consider underserved communities in developing programming. Define "underserved."
- 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)
  - o Programming staff
- Investigate offering programming that can be used for continuing education credits
  - o Research CEU certification. Conduct a cost/benefit analysis to make sure offering CEUs is financially worthwhile to MCHS.
  - o If the cost/benefit works in MCHS's favor, create and offer formal paid classes eligible for CEUs.
  - o Address gaps in continuing education offerings available in the market, structure CEU programming to be widely useful to a large enough audience.

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 Start a Visibility Committee to move goals in this section forward. Hire professional assistance if needed.
  - o Reflect and promote strategic plan through branding materials and activities
  - o Streamline and optimize outreach practices
    - o Create communications procedures and policies to help staff more easily manage communications.
    - 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
- Publicly discuss how MCHS serves the larger community beyond exhibits and events (community development activities, moving the museum community forward, providing advice on how to run a nonprofit and a museum, showing the importance of history in making decisions today and in the future, assisting with research and preservation projects that are far-reaching geographically)
- 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
- Purchase customer relationship management software that is

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
      - • Create a formal training process for new board members so they can effectively lead MCHS.
      - • Regularly provide board education at board meetings on topics related to finances, administration, endowments, collections information, and etc.

- Create committees that have short-term tasks to accomplish so people can serve for a shorter period of time.
  - Ensuring board representation from around the county
  - Reviewing and updating board functions, duties, and practices
  - Keeping current and former board members engaged in MCHS's work

5b. Collections-Related Processes:
- Review and revise collections policies to accommodate organizational mission, space constraints, and goals.
- Review and revise cataloguing and records management processes and systems, including collections inventory software tools. Purchase new collections software that is accessible to all staff.
- Develop formal policies and procedures for managing digital collections and ensure for the proper migration of digital data.
- Ensure collections staff receive ongoing education on updated best practices in collections management.
- Create a formal short-term loan process (define "short-term") to allow MCHS to accept short-term loans of items for exhibit and for MCHS to loan items to other institutions for exhibits and other educational purposes.
- Review collections for items that can be deaccessioned.

5c. Administrative Processes:
- Establish, update, and implement processes for:
  - Reviewing and updating personnel manual. Include the following:
    - Conflict resolution policies and procedures
    - Remote work
    - Process for board in dealing with issues related to the executive director
  - Regular personnel review process, including annual review process for the executive director, coordinated with annual budgeting and salary processes
  - Finance procedures manual and processes, including:
    - Policies related to operating reserve and capital improvement funds
    - Procedure for assigning new board members to access bank accounts and sign checks
    - Procedures for avoiding fraud
  - 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
  - Marketing and communications processes

V. **Prioritization of Strategic Goals**

Key to Prioritization:
All tasks at MCHS require a plan to move forward. In determining priorities, certain items are dependent on other tasks being accomplished first and other items will take more time due to their complexity or the amount of funding needed.

Priority 1:
- o Immediate need for progress (other tasks dependent on it or there is pressing reason to get to it)

Priority 2:
- o Incremental progress needed over time (important but complex project with a long-term timeline)

Priority 3:
- o No immediate need for progress (goal would be good for the organization but not immediately necessary)

Strategic Goal Prioritization, Order, and Revenue Potential:

Goal Description	Priority	Order	Revenue Potential
RESOURCE GOALS			
Increase sustainable funding in order to add staff and benefits. Focus on increasing donations/gifts, memberships, and contract service or earned income.	1	1	X
Make museum assistant a full-time position.	1	2	
Make the registrar a permanent position.	2	3	X
Better manage the collections by accessioning the collections-in-waiting and deaccessioning items. This will allow for a gap analysis and make the collections more accessible.	2	4	
BUILDING & GROUNDS GOALS			
Maintain the building environment. Reprioritize Contegrity & Capacity Improvements goals.	1	1	
Fix the erosion.	1	2	X
Figure out how to pay off the HVAC loan quickly.	3	3	X
Nominate museum property to National Register of Historic Places	2	4	X
Deal with building capacity (space) issues.	2	5	
PROGRAMMING GOALS			
Change the on-site exhibits more frequently & create small travelling exhibits in order to generate visitors, publicity, and support.	2	2	X
Determine what programming staff have the capacity to carry out and drop activities staff don't have time for.	1	1	
Create a members-only area on the website.	2	3	
Define "underserved" communities in the county & figure out how to reach them.	2	1	
VISIBILITY & OUTREACH GOALS			

Increase the visibility of MCHS by streamlining communications, creating more exhibits, and addressing challenges related to the museum's location.	2	2	
Get Customer Relationship Management software.	1	1	
PROCESS GOALS			
Update policies & procedures manuals to address remote work, new board member access to bank accounts, conflict resolution, ED annual review, collecting in relation to mission and space restrictions, and short-term loans.	1	1	
Get a new collections software system.	2	3	X
Continue board education.	2	2	

Revenue potential may include seeking grant funding.

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