

Greater Oneonta Historical Society (GOHS) Strategic Plan DRAFT

2017-2019



Preserving the Past for Oneonta's Future



GOHS named 2015 Organization of the Year by the Future for Oneonta Foundation

Table of Contents

	Page Number
I. Introduction and Overview	1
II. Mission and Vision	2
III. Environmental Assessment	3
IV. Work Plan: Strategic Issues, Goals, and Strategies	4

I. Introduction and Overview

Executive Summary:

Founded in 1939, the Greater Oneonta Historical Society, formerly the Upper Susquehanna Historical Society, strives to preserve the heritage of the Greater Oneonta area by collecting and preserving cultural materials and to educate the population by offering programs which familiarize area citizens with local history. The organization enhances the future by providing a tradition on which our contemporary culture can be based and out of which it can grow. A cornerstone of the organization has evolved today to include a history center for the residents of Oneonta and the surrounding region, as well as an anchor on Main Street in historic downtown Oneonta.

The following document outlines GOHS's strategic plan, which is intended to help guide the organization's evolution and growth over the period 2017 to 2019.

GOHS developed this strategic plan to guide future efforts. The planning process included the following components:

- A survey of Board Members to gather initial thoughts and suggestions about the organization's mission, values, and vision; assess the organization's strengths, weaknesses, opportunities, and threats; and identify goals in a variety of areas.
- A strategic planning retreat with Board members and staff.
- Meeting with the Board and staff to review and revise the draft plan.
- Adoption by the Board of Trustees on 6 December 2016.

II. Mission and Vision

Mission Statement

The Greater Oneonta Historical Society, and its History Center, promotes greater Oneonta's past by providing stimulating educational experiences, collecting and preserving authentic objects and documents, and disseminating knowledge and understanding through dynamic programs and exhibitions.

Vision Statement

The vision of the Greater Oneonta Historical Society is to:

- Advocate and be a resource for historic preservation in Oneonta
- Increase collections accessibility while maintaining best practices in care and management
- Restore and improve the Oneonta History Center
- Develop and sustain a successful museum and archival operation
- Facilitate ongoing community outreach and collaboration
- Provide robust programming

Values

Preserve and Share Oneonta's History

IV. Work Plan

1) Strategic Issue: Governance				
Goal: The governing authority of GOHS (Trustees) will be clearly informed and defined, and will assume full responsibility to act in the best interest of the organization.				
STRATEGY	ACTIONS	RESPONSIBILITY	TIME FRAME TO BE COMPLETED	RESOURCES NEEDED
1.1 Develop board infrastructure to effectively and efficiently support board operations.	Maintain active committees	Executive Committee and ED	Q1 2017	
	Develop procedures that support the process for nominating Board members	Executive Committee and ED	Q2 2017	
	Finalize Personnel Policies and provide overview/explanation to Board	Executive Committee and ED	Q3 2017	
	Develop a succession plan for ED, staff, and board leadership	Executive Committee and ED	Q2 2017 and then Annually	
	Finalize and approve Strategic Plan	Board	Q4 2017	
	Recruit Board and committee members in priority areas	Board	Q2 2017	
1.2 Set clear expectations for board members	Identify training needs for Board and develop training program	Executive Committee and ED	Q3 2017	
	Define Board expectations and involvement with committees	Executive Committee and ED	Q1 2017	

2) Strategic Issue: Programs and Exhibitions

Goal: GOHS will provide sustainable and high quality programs and exhibitions that educate and enrich the community.

STRATEGY	ACTIONS	RESPONSIBILITY	TIME FRAME TO BE COMPLETED	RESOURCES NEEDED
2.1 Assess exhibition and program offerings in regards to mission and return on investment	Develop an annual plan	Programming Committee and ED	Q1 2017	
	Develop criteria	Programming Committee and ED	Q1 2017	
	Develop an evaluation process	Programming Committee and ED	Q2 2017	
2.2 Expand programming and collaborations and outreach	More demonstrations and living history offerings	Programming Committee and ED	Q1 2017	
	Continue and expand oral history projects	Programming Committee and ED	Q3 2017	
	Offer trips, ranging from day to overnight, focused on history experiences	Fund Development Committee and ED	Q4 2016 and Q1 2017	
	Identify, develop and pursue productive partnerships with other organizations in the region	Board and ED	Ongoing	
	Improve access to collections, including online database	Collections Committee	Q1 2017	

3) Strategic Issue: Facility and Operational Planning

Goal: GOHS will ensure that Society and History Center operations are effective, efficient, and sustainable.

STRATEGY	ACTIONS	RESPONSIBILITY	TIME FRAME TO BE COMPLETED	RESOURCES NEEDED
3.1 Develop a facility plan for prioritizing needed upgrades and determining how to best utilize space	Complete the renovation plan for 2nd floor and develop a plan for the 3rd floor	Building Committee	Q4 2016	
	Restore the building façade	Building Committee	2018	
	Explore feasibility of climate-controlled storage	Collections Committee and Building Committee	Q1 2017	
	Develop plan for identifying new operating costs and impact	Building Committee and Finance Committee	Q4 2016 and Annually Q4	
3.2 GOHS will develop necessary staff and support systems to best fulfill mission	Develop a sustainable staff model and human resources plan	Task Force	Q2 2017	
	Evaluate the impact of minimum wage on operating budget	Finance Committee	Q4 and Annually	
	Review job descriptions	Executive Committee and ED	Q2 2017	
	Develop staff through professional development	Executive Committee and ED	Q4 and Annually	
	Develop a plan for fiscal checks and balances	Treasurer and Finance Committee	Q4 2016	
	Develop volunteer expectations and job descriptions	Task Force	Q2 2017	
	Increase volunteer base and involvement	Task Force	Q2 2017	

4) Strategic Issue: Finances & Resource Development

Goal: GOHS will strengthen the financial systems and grow the resources required to sustain the mission and enhance programs and exhibitions.

STRATEGY	ACTIONS	RESPONSIBILITY	TIME FRAME TO BE COMPLETED	RESOURCES NEEDED
4.1 Develop and implement fund development operations	Create resource development plan, including case for support	Fund Development Committee	Q2 2017	
	Examine and maintain fundraising database and tracking system	Fund Development Committee and Database Coordinator	Q2 2017	
	Develop strategies for leveraging contacts to raise funds	Board	Q3 2017	
4.2 Diversify and increase funding sources	Continue to develop three priority areas: membership, earned revenue (retail, programs) and contributed income (grants, donor cultivation)	Membership Committee, Fund Development Committee, Programming Committee, Retail Committee and Board	Q4 2017	
	Develop strategy for estate planning and planned giving	Fund Development Committee	Q3 2017	
	Implement policies and fee structures for rentals and collection services	Building Committee, Finance Committee and Collections Committee	Q1 2018	
4.3 Strengthen the financial systems and infrastructure of GOHS	Develop and implement financial policies and procedures	Finance Committee	Q3 2017	
	Address workload of Treasurer position and develop more support	Finance Committee and Executive Committee	Q3 2017	

5) Strategic Issue: Marketing

Goal: GOHS will raise visibility and increase brand awareness of the organization and its programs and impact.

STRATEGY	ACTIONS	RESPONSIBILITY	TIME FRAME TO BE COMPLETED	RESOURCES NEEDED
5.1 Strengthen marketing efforts	Strengthen marketing work group	Communications and PR Committee and ED	Q4 2016	
	Examine protocol for marketing	Communications and PR Committee and ED	Q1 2017	
	Review website for mobile-friendliness and accessibility	ED and webmaster	Q1 2017	
	Assess and improve social media efforts	Communications and PR Committee and ED	Q4 2016 Assess Q2 2017 Improve	
5.2 Explore possible rebranding to better position the organization	Carry out membership survey	Membership Committee and Communications and PR Committee	Q3 2017	
	Evaluate the GOHS brand and marketing (GOHS and History Center)	Communications and PR Committee and ED	2018	

6) Strategic Issue: Care of Collections

Goal: GOHS will improve storage conditions and preservation measures for collection materials.

STRATEGY	ACTIONS	RESPONSIBILITY	TIME FRAME TO BE COMPLETED	RESOURCES NEEDED
6.1 Preserve Collections	Optimize use of Past Perfect for cataloguing and documentation	Collections Committee	Q4 2017	
	Document public events using technology	Collections Committee	Q2 2017	
	Prioritize digitizing collection	Collections Committee	Q2 2017	
	Assess collections for preservation and storage requirements	Collections Committee	Q1 2017	
	Stabilize and process Warnken and Lockridge image collections	Collections Committee and Fund Development Committee	Q1 2018	
6.2 Improve storage conditions	Prepare plan for climate-controlled storage for each type of collection material and begin implementation	Building Committee and Collections Committee	Q2 2017	
6.3 Provide greater security for the collections	Review disaster response plan	Collections Committee	Q2 2017	
	Establish a protocol for security of the collection	Collections Committee	Q2 2017	