



*Preserving the Past for Oneonta's Future*



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

Approved by the Board of Trustees, 3 June, 2020

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## **I. Mission, Vision and Values**

### **MISSION:**

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

### **VISION:**

*Greater Oneonta Historical Society will increase partnerships and community engagement to document and share Oneonta's history and its importance.*

### **VALUES:**

- *Integrity*
- *Engagement*
- *Stewardship*
- *Respect*
- *Accessibility*
- *Inclusion*

## II. Environmental Assessment/SWOT Analysis

<p style="text-align: center;"><b>STRENGTHS</b></p> <ul style="list-style-type: none"> <li>● Volunteer support</li> <li>● Motivated Executive Director and staff</li> <li>● Diverse, engaged and skilled Board</li> <li>● History Center</li> <li>● Location</li> <li>● Collections ‘</li> <li>● Exhibitions</li> <li>● Gift shop</li> <li>● Community focused events</li> <li>● Financial position and solvency</li> <li>● Proven track record</li> </ul>	<p style="text-align: center;"><b>WEAKNESSES</b></p> <ul style="list-style-type: none"> <li>● Uneven Board member attendance and engagement at meetings and events</li> <li>● Limited funding for staffing and limited staff capacity</li> <li>● Space for collections</li> <li>● Officer recruitment</li> <li>● Fundraising and stewardship planning and focus</li> <li>● Marketing capacity</li> <li>● Volunteer management and dependence</li> <li>● Membership renewal process</li> <li>● Exhibition planning and topic areas</li> <li>● Limited connections to colleges</li> <li>● Limited social media presence</li> <li>● Archiving and preserving new media</li> </ul>
<p style="text-align: center;"><b>OPPORTUNITIES</b></p> <ul style="list-style-type: none"> <li>● Planned giving</li> <li>● Partner and collaborate with other organizations and colleges</li> <li>● Exhibition collaborations</li> <li>● Upper floor rentals</li> <li>● Engage in more Oneonta events</li> <li>● Volunteers</li> <li>● Tours to historic sites</li> <li>● Expanded fundraising</li> <li>● Younger professionals want to live in town</li> <li>● Downtown Revitalization Initiative</li> <li>● Attracting new members</li> <li>● Gift shop</li> <li>● Expanded programming</li> </ul>	<p style="text-align: center;"><b>THREATS/CHALLENGES</b></p> <ul style="list-style-type: none"> <li>● Increasing building operation costs</li> <li>● Engage younger people</li> <li>● Aging demographic</li> <li>● Safety of collections during construction</li> <li>● Funding competition</li> <li>● Funding cuts or decreases from donors</li> <li>● Government bureaucracy and requirements</li> <li>● Maintain growth</li> <li>● Keeping up with and embracing technology</li> <li>● Downtown and Center City challenges</li> <li>● Change in how history is delivered</li> <li>● Unsuitable collections donations</li> </ul>



### III. 2020-2022 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	TASKS	RESPONSIBILITY	TARGET DATE
1.1 Strengthen Board infrastructure and engagement	Strengthen committee system	a. Reenergize underperforming committees	Executive Committee	2020
	Strengthen board diversity	a. Assess the diversity and skill sets of the board b. Recruit board members based on assessment	Executive Committee	2020
	Develop a board succession plan	a. Address officer succession	Executive Committee	2020
	Review and formalize board member expectations	a. Develop advocacy expectations b. Develop giving expectation c. Implement continuing education for board d. Establish board meeting expectations (attendance and engagement)	Board President and Executive Committee	2020
	Improve board engagement	a. Increase board networking and interaction b. Improve board recognition for service	Full Board	2021
	Review strategic plan bi-monthly and identify professional development training		Vice-President	Ongoing

## 2) Strategic Issue: Revenue Generation

Goal: Greater Oneonta Historical Society will strengthen fundraising infrastructure and efforts to secure the operating funds and reserve required to sustain mission, support the facility, and strengthen programs.

STRATEGY	ACTIONS	TASKS	RESPONSIBILITY	TARGET DATE
2.1 Strengthen development infrastructure	Create revenue plan outlining current efforts and areas for focus	<ul style="list-style-type: none"> <li>a. Review donor info and statistics (assessment and ROI)</li> <li>b. Develop planned giving plan</li> <li>c. Create a technology fund</li> </ul>	Fund Development Committee	2020
	Strengthen board involvement in fundraising	<ul style="list-style-type: none"> <li>a. Identify and define board role</li> </ul>	Executive Committee	2020
2.2 Improve fund development efforts	Increase donor acquisition	<ul style="list-style-type: none"> <li>a. Research and identify prospects</li> <li>b. Address lapsed members</li> </ul>	Membership Committee and Fund Development Committee	2020 and annually
	Increase donor stewardship	<ul style="list-style-type: none"> <li>a. Implement a donor recognition event annually</li> </ul>	Fund Development Committee	2020 and annually
	Implement phase one planned giving		Fund Development Committee	2020
	Explore grant opportunities	<ul style="list-style-type: none"> <li>a. Research and identify grants</li> </ul>	Executive Director and Fund Development Committee	2020 and ongoing
	Recruit corporate funding support	<ul style="list-style-type: none"> <li>a. Solicit money and in-kind support from local and regional businesses</li> <li>b. Develop a business</li> </ul>	Membership Committee and Fund Development Committee	2020

		membership		
	Improve online fundraising	<ul style="list-style-type: none"> <li>a. Expand recurring donation tool</li> <li>b. Leverage social media and encourage online fundraising (Facebook, GoFundMe)</li> </ul>	Fund Development Committee and Marketing Committee	2020



### 3) Strategic Issue: Collections Management and Programs

Goal: Greater Oneonta Historical Society will utilize its collections and strengthen programs to increase community and audience engagement and support.

STRATEGY	ACTIONS	TASKS	RESPONSIBILITY	TARGET DATE
3.1 Further develop programs and exhibitions	Develop annual program plan	a. Review with the board	Programs Committee	2021
	Improve and increase satellite exhibition opportunities	a. Develop traveling exhibit (pop up) b. Maintain rotating exhibits schedule	Executive Director and Ad Hoc Committee	2021
	Review and revise operating hours		Executive Director	2021
	Develop program partners	a. Partner with the Yager Museum and Discovery Center	Youth and Children's Programming Committee	2020
3.2 Increase access to collections	Improve collections data management	a. Optimize use of PastPerfect and online archive for collections and volunteer and donor management	Executive Director and Database Manager and Collections Committee	2020
	Improve public access of collections		Executive Director and Database Manager and Collections Committee	2020
3.3 Make collections impactful	Revise collecting policies	a. Develop criteria for collecting	Executive Director and Collections Committee	2021

**4) Strategic Issue: Marketing and Partnerships**

Goal: Greater Oneonta Historical Society will build image and reputation to attract audience engagement and funding.

<b>STRATEGY</b>	<b>ACTIONS</b>	<b>TASKS</b>	<b>RESPONSIBILITY</b>	<b>TARGET DATE</b>
4.1 Increase community engagement and visitation	Reenergize Marketing Committee		Board President and Executive Committee	2020
	Develop marketing plan	a. Increasing brand awareness b. Develop promotions for programs, including walking tours c. Increase program engagement/audience	Marketing Committee	2021
	Improve online platform	a. Improve website platform	Adrian and Marketing Committee	2020
	Continue to improve social media efforts	a. Prioritize Facebook posting b. Utilize Instagram	Marketing Committee	2020
	Foster increased community partnerships		Executive Director	2021

### 5) Strategic Issue: Operations

Goal: Greater Oneonta Historical Society will leverage its facility, technology and personnel to successfully accomplish its mission and achieve sustainability.

STRATEGY	ACTIONS	TASKS	RESPONSIBILITY	TARGET DATE
5.1 Strengthen and sustain staffing	Develop a plan for staffing succession	<ul style="list-style-type: none"> <li>a. Develop plan for ED departure in 2020</li> <li>b. Develop a plan for future staffing</li> </ul>	Executive Director and Executive Committee	2020
	Conduct staff compensation analysis		Finance Committee	2020
	Strengthen volunteer management	<ul style="list-style-type: none"> <li>a. Explore creating a volunteer coordinator</li> <li>b. Explore new volunteer training</li> <li>c. Improve volunteer recognition</li> </ul>	Executive Director and Ad Hoc Committee	2021
5.2 Leverage facility and technology to better support operations	Complete current building project	<ul style="list-style-type: none"> <li>a. Complete the 3<sup>rd</sup> floor restoration and renovation</li> <li>b. Complete façade work</li> </ul>	Building Committee	2021
	Evaluate technology that improves operations		Executive Director and Ad Hoc Committee (Technology)	2020
	Improve facility security	<ul style="list-style-type: none"> <li>a. Evaluate video surveillance</li> </ul>	Building Committee	2021
5.3 Membership operations	Strengthen membership program	<ul style="list-style-type: none"> <li>a. Develop succession plan for newsletter</li> </ul>	Executive Director and Membership Committee	2020

