

# THREE-YEAR STRATEGIC PLAN

2021-2023

EAST HADDAM HISTORICAL SOCIETY  
EAST HADDAM, CONNECTICUT



Kathleen Craughwell-Varda  
Museum Consultant

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6 Old Middle Road  
Brookfield, CT 06804  
203-241-0618  
vardaconsulting@aol.com

# EAST HADDAM HISTORICAL SOCIETY

## ORGANIZATION HISTORY<sup>1</sup>:

The East Haddam Historical Society, Incorporated (EHHS), was founded in 1962 to preserve and present the history of the Town of East Haddam. In the beginning, the EHHS borrowed exhibit space from Society Hall, a local business in East Haddam village. As local interest in the collection grew, and funding grew, they moved into the barn on the grounds of the Amasa Day House located on the village green in historic Moodus Center. They moved to their present location on Town Street 18 years ago with the purchase of a cape-style building. The Society undertook a capital improvement drive about 10-years ago, along with a grant from CT Humanities, to build the Shepard-Wynn exhibit space. The Society owns a 7,000 square foot, nine-room building with two rental apartments near Gillette's Castle State Park that includes museum space featuring exhibits on the history of the town and its many villages. Special exhibits include ones on the Revolutionary and Civil Wars, the Moodus Drum and Fife Corps, the Moodus Cotton Mills, the Boardman Silver Works, actor William Gillette, the Moodus summer resorts, the Spencer-Cone store, Venture Smith, artists Langdon Kihn, Bill Tyner, and Heinz Warneke. The museum features a new exhibit every year. 2020's major exhibit was "Saving Land, Saving History" which is a community collaboration between EHHS and The East Haddam Land Trust and local Emmy Award winning documentary videographer Ken Simon. Through their programs and exhibits they strive to provide members and visitors with a deeper understanding and personal connection to the history of East Haddam.

The EHHS has a membership of about 340 and is administered by a 12-member Board of Trustees and a five-member Executive Committee (President, Vice-President, Recording Secretary, Corresponding Secretary, Treasurer). The Board last year created the position of Museum Manager (Executive Director) and hired a former Board member to fill this important position. Although annual expenses generally exceed income, the Society has a strong investment account and endowment.

The Society has grown and prospered because of the dedication and vision of its membership and trustees. However, the Board has never utilized written strategic or business plans as operational tools for institutional improvement. This lack of organizational planning has adversely affected the Society's ability to have a clear understanding of what they want to accomplish. For example, the Society does not have a written Vision or Mission Statement. The Society is governed by a set of By-Laws that was last revised in 2015. Article 2 of the By-Laws is titled "Purpose", which functions as a statement of our mission, but it is very dated and does not provide a clear direction for the future. Its language is out-of-date with current best practices. Consequently, the EHHS tends to be more reactionary than proactive in their approach to managing operations. For example, people suggest topics that they think will be of interest for exhibits or programs, and the Board will discuss and decide. However, many times there is no

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<sup>1</sup> Much of this section is taken from the East Haddam Historical Society grant application to CT Humanities, 2020.

connection between programs and current exhibits, and this can lead to a haphazard approach to museum management.

To plan for future growth and development, the Board has realized that they must now engage in a strategic planning process to identify and prioritize needs with action plans for achievement that will be consistent with a revised mission statement and new vision statement. Several priority areas for growth include; membership and community engagement, branding and marketing, research and publishing, re-design of exhibits, building and grounds. A business plan that will establish a sustainable financial future is a necessary addition to their strategic planning.

## MISSION STATEMENT:

The East Haddam Historical Society's mission was summarized in the Statement of Purpose in its by-laws, last approved in 2015.

Statement of Purpose:

*The purpose of the EHHS is to promote the study of history of the Town of East Haddam, the lower Connecticut Valley, and the State of Connecticut, to encourage student interest in the same, and to acquire, hold and preserve documents, artifacts, relics, buildings, real estate, and records of all kinds relating to that history.*

After reviewing the Statement of Purpose with the board at the first strategic planning meeting and realizing that it did not represent who they are, the board was divided into three groups to write a new mission statement for the historical society. They were asked to ensure that their new mission statement answered the following questions:

- What does the EHHS contribute to its community?
- Who does the EHHS serve? Who is their audience?
- What services does the EHHS provide?
- Why is this important to its community and audience?

After reviewing the drafts written by each group and highlighting what were the key elements, a new mission statement was agreed upon by the board. This mission statement was displayed at all strategic planning meetings and at the final retreat it was edited one last time.

*The EHHS illuminates and preserves the stories of the people and places that shape our community.*

The East Haddam Historical Society does not have a vision statement at this time.

# STRATEGIC PLANNING PROCESS

A preliminary meeting was held on June 14, 2020. The consultant met with the board president, and museum manager. The CT Humanities grant funded project and the historical society's priorities for the strategic plan were reviewed. This meeting provided the opportunity for the consultant to meet the principal participants in the strategic planning process and hear firsthand their concerns for the institution.

There were four meetings during the strategic planning process: a preliminary meeting, two full-day meetings, and one half-day meetings<sup>2</sup>. At each strategic planning meeting the following signage was displayed at each meeting:

- Statement of purpose of EHHS and then the new mission statement of EHHS
- Sign reading, "Failing to Plan is Planning to Fail"
- Sign reading, "Ground Rules" which included the following:
  - There are NO bad ideas!
  - One person speaks at a time.
  - Listen when someone speaks.
  - Think about small, medium, and big ideas. No idea is too small.
  - Allow yourself to be inspired by what you hear
  - When considering ideas - visualize yourself as a Board member, staff member, volunteer, visitor, and a donor.
- Sign reading, "Goals of the strategic plan should be SMART"
  - S – Specific
  - M - Measurable
  - A - Attainable
  - R - Relevant
  - T – Time-bound"

Below is an outline of each strategic planning meeting with the comments generated by the group discussions.

## **Full Day Meeting, August 22, 2020**

Meeting with EHHS Board of Trustees, museum manager and volunteers/members.

Summary: The goal of the full-day retreat was to review the current standing of EHHS to make sure that all participants were equally well informed before beginning the strategic planning process. A review of current programs, outreach, and finances led to a group activity to outline how the historical society would respond if it lost its endowment.

- Each attendee wrote three goals they have for EHHS on a piece of paper, collected by the consultant, but not shared at this time with the group.
- Icebreaker – squiggle birds, not about being an artist, it's about communicating an idea – don't need to be an expert to develop a meaningful plan.

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<sup>2</sup> The proposal called for 5 meetings, but an uncooperative gallbladder required the Consultant to cancel one of the half-day meetings. A second full day meeting was held instead.

- EHHS statement of purpose/mission statement – what does it say and how do we use it to craft a strategic plan? Attendees were divided into three groups to craft a new mission statement.
- Break into 3 groups. Each group answers the following question – A crash of the stock market wipes out all the investments and endowment of EHHS. How does the Historical Society fill the annual budget gap? How do you raise the funds lost? What needs to be cut to save money? What are essential services? How do you continue to meet expenses? Can the Historical Society stay open? What are vital services? What stays? What goes? Report by each group on how they would respond. Do the items they would keep represent what's important to them?

The following is the responses from each group on how they would address the situation outlined above. The most distinct finding from this exercise was learning that the majority of the board was unaware of costs, income, and which activities were integral to the historical society.

	<b>Group 1</b>	<b>Group 2</b>	<b>Group 3</b>
Fill Budget Gap	<ul style="list-style-type: none"> <li>• Merchandise</li> <li>• Membership fees</li> <li>• Annual appeal</li> <li>• Charge for programs</li> <li>• Grants</li> <li>• Rent</li> </ul>	<ul style="list-style-type: none"> <li>• Move up Annual Appeal</li> </ul>	<ul style="list-style-type: none"> <li>• Appeal to town</li> <li>• Build membership</li> </ul>
Raise Fund	<ul style="list-style-type: none"> <li>• Rent B &amp; G</li> <li>• Membership drive</li> </ul>	<ul style="list-style-type: none"> <li>• Rent B &amp; G</li> <li>• Membership drive</li> <li>• Add 1 more rental unit</li> </ul>	<ul style="list-style-type: none"> <li>• Raise rents</li> <li>• Fundraiser</li> </ul>
What gets cut to save \$	<ul style="list-style-type: none"> <li>• Nothing</li> </ul>	<ul style="list-style-type: none"> <li>• Cleaning person</li> <li>• Grounds person</li> <li>• Cut salary</li> <li>• Postpone capital improvement</li> </ul>	
Essential	<ul style="list-style-type: none"> <li>• Programs</li> <li>• Museum education</li> <li>• Outreach</li> </ul>	<ul style="list-style-type: none"> <li>• Insurance</li> <li>• Utilities</li> </ul>	<ul style="list-style-type: none"> <li>• Utilities</li> <li>• Maintenance</li> <li>• Insurance</li> <li>• Keep place from falling down</li> </ul>
How will you meet expenses	<ul style="list-style-type: none"> <li>• Through raised funds</li> </ul>		
Open/Closed	Must be open	Open	Closed
Vital Services			
What stays?	All		
What goes?	Nothing	Maintenance	

- Group discussion about rightsizing – what is it? You can't be everything to everyone. What does EHHS do that others don't and is valued? What should it do that others can't? What

does EHHS do that isn't mission driven or duplicates others? Do these recommendations align with morning conversation of what's valued and they should keep doing?

- What are we doing now vs. what do we want to do in the future? A lively group discussion.

<b>What EHHS Currently Offers</b>	<b>What EHHS Wants to Provide</b>
Programs	Membership – Annual Appeal
Events	Oral Histories
Video/Documentaries	Historical Research & Publications
Exhibits	Technology with exhibits
Education/Outreach	Docent training
Collaborations	Cataloguing/Intellectual Control
Addition for storage	Policies
Zero Boys Soccer – Series of Videos	Procedures
Rentals in building	Community involvement in exhibit development
	Interactive exhibitions
	Programs support exhibits
	Temporary exhibits
	Expanding audience

Everything except creating new policies and procedures is a budget expense that is not tied to any income. Having a strong fund-raising stream is a big issue for the historical society.

- Meeting summary. Today was about looking inward/self-reflection, discovering what's really relevant, learning what right-sizing could look like. Next meeting is about looking outward and receiving feedback from the community.

### **Full Day Meeting, October 24, 2020**

Meeting with EHHS Board of Trustees, museum manager and volunteers/members.

Summary: As part of this meeting the board was led in an examination of the collection storage areas and exhibit spaces and compare their efforts to best standards and practices. The responses to an online survey to cultural heritage organizations was reviewed and served as the start of a discussion of the value of collaborating with other cultural heritage organizations. Finally, after reviewing their own identity as an organization (collection and exhibit based) and how they are perceived by their community a conversation on branding and marketing was held.

### **Collections**

- Review of museum and archival collections and exhibit areas in the historical society.
  - After reviewing best standards and practices in the museum field for collections care and exhibitions, the participants were asked to review the exhibit galleries and collection storage and then share their findings.

<b>Positive Attributes</b>	<b>Negative Attributes</b>	<b>Needed Changes</b>
<ul style="list-style-type: none"> <li>• Good access</li> <li>• There is collection storage</li> <li>• Dry-unheated</li> </ul>	<ul style="list-style-type: none"> <li>• No environmental control</li> <li>• Bad lighting</li> <li>• Too small</li> <li>• No organization</li> <li>• No pest management</li> <li>• Turn at top of stairs</li> <li>• Unsupported joists</li> <li>• Shelving bowing</li> <li>• No work area</li> <li>• Newspapers wrapped in paper</li> <li>• Not user friendly</li> <li>• Collection and non-collection together</li> <li>• Paint and collection items stored together</li> <li>• No museum housing</li> <li>• Using materials that off-gas in storage</li> </ul>	<ul style="list-style-type: none"> <li>• New storage</li> <li>• Have some acid free storage materials</li> <li>• Budget for acid free supplies</li> <li>• Research to determine most suitable space for collection storage</li> </ul>

- Groups discussion on their findings in examining the exhibit areas.

<b>Positive Attributes</b>	<b>Negative Attributes</b>	<b>Changes Needed</b>
<ul style="list-style-type: none"> <li>• Lighting</li> <li>• Large exhibit space/wall space</li> </ul>	<ul style="list-style-type: none"> <li>• Editing – hone down # of items</li> <li>• Signage – more explanation</li> <li>• Need color</li> <li>• Flow/story telling</li> <li>• Haphazard display</li> <li>• Post its unprofessional</li> <li>• Distance for viewing</li> <li>• Cohesive story</li> <li>• Target young people</li> <li>• Flow of story</li> <li>• Too low materials</li> </ul>	<ul style="list-style-type: none"> <li>• Define areas better – thematically lead visitor</li> <li>• Text &amp; labels</li> <li>• Edit out what doesn't belong – stove, washer – neither are EH provenance</li> <li>• Value/impact to interpretation</li> <li>• Repetition/redundancy – don't over crowd</li> </ul>

- Review of policies and the importance and benefits of having them.
- Review of collaborations and examples of good collaboration in cultural heritage organizations in Connecticut.
- Review feedback from institutions that completed survey.  
Break out Groups: Based on the feedback from the survey and your knowledge of the EHHS identify 3 partnerships/collaborations that EHHS can spearhead or be part of. Think about the collections, your new mission, how you relate to other sites, what is unique about EHHS.

Group 1	Group 2	Group 3
<ul style="list-style-type: none"> <li>• First Church (Venture Smith gravesite)/St. Stephen/EHHS V. Smith statue</li> <li>• Middlesex County HS – V. Smith</li> <li>• Beman Triangle – Venture Smith’s grandson’s house – Wesleyan professor – race relations</li> <li>• CT Landmarks (local history) – properties in town</li> <li>• EH Business Community tours, trains, etc.</li> <li>• Facebook &amp; CT Freedom Trail – V. Smith Tourism</li> <li>• Haddam HS – V. Smith homestead there</li> <li>• EH Celebrity Driving Tour Map</li> </ul>	<ul style="list-style-type: none"> <li>• CT Land Trust</li> <li>• First Congregational Church/St. Stephens – First Episcopal Church – oldest bell</li> <li>• Haddam HS</li> <li>• Work with Gillette Castle Friends group or State</li> <li>• Goodspeed top tourist</li> <li>• Art Organizations – art works in collection</li> </ul>	<ul style="list-style-type: none"> <li>• V. Smith – Historical Society, Schools, Library</li> <li>• Gillette – EHHS humanize him</li> <li>• Haddam – off-shoot of town – link community</li> <li>• First Church – legit – off shoot of Haddam Church</li> <li>• Goodspeed – collaborate with other arts orgs</li> </ul>

From these discussions the top potential collaborations to pursue were identified:

- Gillette Castle – EHHS present information about the man behind the Castle
  - Build on Venture Smith
  - Build on Nathan Hale – exhibit on schools
  - Get Library involved – special book table to coincide with Town Historian’s annual lecture
  - Goodspeed – exhibits tied to annual shows
- Review of marketing and branding

**Half Day Meeting, November 11, 2020**

Meeting with EHHS Board of Trustees, museum manager and volunteers/members.

Summary: Review of the goals for the EHHS strategic plan by examining the changes needed in governance, finance, outreach, and professional development based on the discussions and break-out sessions from the prior meetings.

- The goals of the strategic plan should be outcome-based and support the mission statement. As we work on the goals for the strategic plan we will be making SMART choices –
  - S – Specific
  - M - Measurable
  - A - Attainable
  - R - Relevant
  - T – Time-bound
- Governance
  - In order to have success you need a strong structure for the board, clearly understood roles and responsibilities and policies and procedures to follow that will lead to success.
  - Board of Directors
    - Governance
    - Policies/Procedures/Plans
    - Training
- Outreach:
  - Audience information and evaluation.
  - Communicating with community.
  - Collect data from users.
- Programs
  - Create ad hoc committee of board members and staff member to review current program offerings and services.
  - Delineate costs and underwriting of programs to keep within budgetary means.
  - Solicit donations from program participants
- Collaborations/Partnerships
  - Increase/improve partnerships within the community.
  - Establish underwriting opportunities for businesses and individuals.
  - Focus on sharing stories that highlight people/groups in East Haddam.
- Marketing/Branding
  - Logo, colors, tagline.
  - Marketing materials for sale – online vs onsite.
  - Underwriter for free admission.
  - Discuss what name this organization should use going forward.
  - Consistent look and message in publicity materials.
- Development/Fund Raising
  - Sufficient annual operating income.
  - Written plan for fundraising and development.
  - Donor cultivation plans.
  - Annual fund goals.
  - Options for donors/levels.
  - Membership and benefits.
  - Recognizing contributions.
  - Printed materials to explain funding opportunities.
  - Role of grants in annual budget.
  - Review use of endowment.
- Collections

- Improve intellectual control, storage, access.
- Budget annually for the purchase of acid-free materials.
- Create policies and procedures.
- Improve intellectual control over the collections – begin with inventory, using an accession log book, etc.
- Research/Archives:
  - Create dedicated archives/library space.
  - Collect oral histories.
  - Publish local history.
- Exhibitions:
  - Define areas of the exhibit thematically.
  - Write, design, and install exhibit text panels and label copy.
  - Remove from exhibit, and eventually from the collection, items that do not have local provenance.
  - Reduce the number of items that are exhibited.
  - Do not display items too low.
- Review key elements for EHHS vision statement based on goals outlined for next three years.
- Jump start new responsibilities as board members by recommending two new members and two prospective board members.

# STRATEGIC PLANNING AT EAST HADDAM HISTORICAL SOCIETY

The purpose of the planning meetings with the members of the board, museum manager, and volunteers/members of the East Haddam Historical Society was to develop a commitment to the direction of the organization and its future goals, with an eye towards ensuring that all activities are mission-driven and that strategic objectives are prioritized.

The East Haddam Historical Society is to be commended for recognizing that their organization is at a crossroads and to ensure that the organization continues and thrives they need to have a strategic plan. The following are the benefits of long-term planning:

- Identify opportunities
- Analyze problems
- Establish priorities and needs
- Allocate available resources
- Plan for future expenses
- Identify needed policies and procedures
- Measure objectives and standards of performance
- Project financial needs and budget accordingly
- Plan for programs, events, and fundraisers and insure sufficient allocation of resources – both people and money.

## **East Haddam Historical Society SWOT (Strengths, Weaknesses, Opportunities, Threats):**

The Project Consultant has generated the following list of SWOT characteristics of the East Haddam Historical Society based on the strategic planning meetings. By reviewing the strengths, weaknesses, opportunities, and threats related to the organization, the board can work together to improve areas of weakness, diminish threats, build on the institutional strengths, and take advantage of existing opportunities.

### **Strengths – aspects of your group that bring success:**

- Endowment that provides support for EHHS.
- Ample size building that provides large exhibit and meeting spaces.
- Income generated by two rental apartments in the building.
- No mortgage on the building.
- Board members that are knowledgeable about local history.
- Board members that are comfortable with technology (Zoom meetings).
- Board members with diverse skills.
- Offer popular programs that attract 80-100 participants.
- Located on the way to Gillette Caste.
- Sufficient parking.

**Weaknesses – characteristics that can be strengthened:**

- Insufficient fundraising by Board to meet increasing financial need.
- Dependence on endowment to fill budget gaps.
- No annual fund.
- Static and declining membership.
- Open limited number of hours (non-pandemic).
- Insufficient fundraisers.
- Minimal support from the community.
- Poor traffic pattern through exhibit spaces and building.
- Exhibits are cluttered and lack labels and explanations.
- Programs are not tied to exhibits.
- Located away from business areas and foot traffic.

**Opportunities – what you can take advantage of:**

- Hone-in on the audience that attends current programs and find ways to make them more involved in the organization and potentially become financial supporters.
- Develop collaborations with other cultural heritage organizations and other non-profits in the community and region to develop good will and outside support for EHHS.
- Reinterpreting permanent exhibit spaces in order to provide a richer experience for visitors.
- Creating an archives/library area for researchers and to promote local history.

**Threats – potential roadblocks to success:**

- Insufficient participation from Board members.
- Lack of board training so that members are well versed in their responsibilities.
- Fewer volunteers.
- Lack of museum policies and procedures that will insure a strongly functioning organization.
- Rental units in a museum building raise the likelihood for a fire, water incident, etc.

# STRATEGIC PLAN GOALS & ACTION STEPS

This strategic plan includes a series of goals, which were identified during the planning meetings, and action steps to achieve these goals. This strategic plan provides year-by-year action steps over the next three years to accomplish the goals set out by the Board of Trustees.

The Board of Trustees needs to review the strategic plan, identify who on the board will work on each action step and determine the cost and impact on the EHHS budget. The strategic plan goals and actions steps should be an item in the monthly agenda of the Board of Trustees to ensure that the work that will move the organization forward is taking place.

All goals and action steps should be reviewed by the board using the criteria provided below. This will insure that going forward the activities of the EHHS will make use of available resources while acknowledging barriers to success. If they do not meet these standards, then the item should be tabled until the criteria can be met.

- Supports the mission of the East Haddam Historical Society.
- Moves EHHS strategically forward.
- Uses current board members, staff and volunteers without placing unreasonable demands on their time and energy or presents the opportunity to recruit new volunteers who would be necessary for the item's successful completion.
- Financially viable without cutting funds allocated to current ongoing activities.
- Provides an educational or community relations opportunity.

## STRATEGIC PLAN GOALS

- Work to become a cultural center for the East Haddam community.
- Work towards the financial stability for the East Haddam Historical Society and to increase fundraising capabilities.
- Redesign and re-envision of exhibit areas to engage the community, share important stories, and provide programs that support the exhibits and the mission of the EHHS.
- Promote the EHHS and expand its reputation through collaborations with other cultural heritage organizations, community businesses and groups.
- Preserve, research, and present the historic museum collections and archives for the benefit of the community.
- Provide training, revise roles and responsibilities for the members of the Board of Trustees to help them serve to the best of their capabilities and meet best standards and practices in the museum field.

# ACTION STEPS

- Governance
  - Provide training to board members on their roles and responsibilities.
  - Develop a board handbook that includes orientation materials, code of ethics, conflict of interest statements, and job descriptions of officers and committee chairs.
  - Create an ad hoc committee to write/revise policies to ensure that activities follow best standards and practices.
  - Develop a business plan that ties expenses to income.
  - Present budget at every board meeting that compares budgeted amounts to actual expenses and income.
  - Develop 5-year preservation and maintenance plan for building and grounds.
- Development/Fundraising
  - Improve fundraising and income to meet current and future expenses and reduce need to use endowment.
  - Develop plan and set income goals for annual appeal.
  - Develop donor cultivation plan.
  - Develop fundraising plan.
  - Review membership levels.
  - Review use of endowment.
- Outreach
  - Identify and share local stories that will resonate with groups in the community.
  - Develop meaningful partnerships/collaborations with area cultural heritage organizations, local businesses, and community groups.
  - Identify underwriting opportunities for funders, such as free admission, naming rights to galleries and archives/research library.
- Marketing & Branding
  - Determine name of the organization – East Haddam Historical Society or East Haddam Museum (on outdoor sign) or other.
  - Create a brand identity including logo (font and color), possibly a tag line and ensure that the brand look is included in all printed materials.
  - Develop merchandise that promotes East Haddam and EHHS and uses new brand identity/logo.
  - Create new outdoor signage.
  - Create a marketing plan to expand the reach of the historical society, but still within its means and manpower.
  - Redesign membership materials and EHHS brochure.
- Exhibitions
  - Perform a critical review of the exhibit spaces, as well as all public spaces, storage areas and staff areas to maximize the potential of the building.
  - Conduct an audience evaluation to collect data for reinterpretation of exhibit galleries.
  - Embark on a multi-stage reinterpretation of the exhibit galleries based on the critical review of the building and spaces, audience feedback, research and identification of key local stories, design plan, and exhibit script.
- Collections
  - Upgrade collection storage which makes access and preservation a priority.
  - Inventory museum collection to establish intellectual control.
  - Record museum and archive donations by year in a museum accession log.
  - Budget annually for purchase of acid-free supplies for collections.

# ALIGNMENT OF STRATEGIC PLAN GOALS WITH ACTION STEPS

Goal	Actions to Take
Work to become a cultural center for the East Haddam community.	<ul style="list-style-type: none"> <li>• Identify and share local stories that will resonate with groups in the community.</li> <li>• Develop meaningful partnerships/collaborations with area cultural heritage organizations, local businesses, and community groups.</li> <li>• Identify underwriting opportunities for funders, such as free admission, name rights to galleries and archives/research library.</li> <li>• Determine name of the organization – East Haddam Historical Society or East Haddam Museum (on outdoor sign).</li> </ul>
Work towards the financial stability for the East Haddam Historical Society and to increase fundraising capabilities.	<ul style="list-style-type: none"> <li>• Improve fundraising and income to meet current and future expenses and reduce need to use endowment.</li> <li>• Develop plan and set income goals for annual appeal.</li> <li>• Develop donor cultivation plan.</li> <li>• Develop fundraising plan.</li> <li>• Review membership levels.</li> <li>• Review use of endowment.</li> </ul>
Redesign and re-envision of exhibit areas to engage the community, share important stories, and provide programs that support the exhibits and the mission of the EHHS.	<ul style="list-style-type: none"> <li>• Perform a critical review of the exhibit spaces, as well as all public spaces, storage areas and staff areas to maximize the potential of the building.</li> <li>• Conduct an audience evaluation to collect data for reinterpretation of exhibit galleries.</li> <li>• Embark on a multi-stage reinterpretation of the exhibit galleries based on the critical review of the building and spaces, audience feedback, research and identification of key local stories, design plan, and exhibit script.</li> </ul>
Promote the EHHS and expand its reputation through collaborations with other cultural heritage organizations, community businesses and groups.	<ul style="list-style-type: none"> <li>• Identify and share local stories that will resonate with groups in the community.</li> <li>• Develop meaningful partnerships/collaborations with area cultural heritage organizations, local businesses, and community groups.</li> <li>• Identify underwriting opportunities for funders, such as free admission, name rights to galleries and archives/research library.</li> </ul>

	<ul style="list-style-type: none"> <li>• Create a brand identity including logo (font and color), possibly a tag line and ensure that the brand look is included in all printed materials.</li> <li>• Develop merchandise that promotes East Haddam and EHHS and uses new brand identity/logo.</li> <li>• Create new outdoor signage.</li> <li>• Create a marketing plan to expand the reach of the historical society, but still within its means and manpower.</li> <li>• Redesign membership materials and EHHS brochure.</li> </ul>
<p>Preserve, research, and present the historic museum collections and archives for the benefit of our community.</p>	<ul style="list-style-type: none"> <li>• Upgrade collection storage which makes access and preservation a priority.</li> <li>• Inventory museum collection to establish intellectual control.</li> <li>• Record museum and archive donations by year in a museum accession log.</li> <li>• Budget annually for purchase of acid-free supplies for collections.</li> </ul>
<p>Provide training, revise roles and responsibilities for the members of the board to help them serve to the best of their capabilities and meet best standards and practices in the museum field.</p>	<ul style="list-style-type: none"> <li>• Provide training to new and existing board members on their roles and responsibilities.</li> <li>• Develop a board handbook that includes orientation materials, code of ethics and conflict of interest statements, and job descriptions of officers, committee chairs and members.</li> <li>• Create and ad hoc committee to write/revise policies to ensure that activities follow best standards and practices.</li> <li>• Develop a business plan that ties expenses to income.</li> <li>• Present budget at every board meeting that compares budgeted amounts to actual expenses and income.</li> <li>• Develop 5-year preservation and maintenance plan for building and grounds.</li> </ul>

## Strategic Plan: Year 1

Evaluation Criteria	Action Step 1	Action Step 2	Action Step 3	Action Step 4	Action Step 5	Action Step 6	Action Step 7
	Governance:  Ad hoc committee to write policies.	Governance:  Develop a business plan.	Governance:  Present expense/income budget at every board meeting.	Development:  Develop plan and set goals for annual appeal. Review goals and outcomes annually.	Development:  Review membership levels.	Outreach:  Develop collaborations with organizations in community.	Marketing:  Determine name of organization.
Supports Mission	✓	✓	✓	✓	✓	✓	✓
Strategically moves us forward	✓	✓	✓	✓	✓	✓	✓
Achievable with current staff and volunteers without placing unreasonable demands on their time/energy.	This is a board led initiative. Policies that originate in committees should be written by them and presented to the board.	Yes	Yes	Yes	Yes	Yes	Yes
Can be financed without cutting funds allocated to current on-going activities	No cost.	No cost.	No cost.	Cost for annual appeal design and mailing materials.	No cost	No cost	No cost.
Provides an educational or community relations opportunity	✓	✓	✓	✓	✓	✓	✓

**Strategic Plan: Year 1 (continued)**

Evaluation Criteria	Action Step 8	Action Step 9	Action Step 10	Action Step 11	Action Step 12
	Marketing:  Create brand identity with new logo, possible tag line.	Exhibitions:  Perform critical review of exhibit spaces, public spaces, offices, etc.	Exhibitions:  Conduct survey/audience evaluation for reinterpretation of exhibit galleries.	Collections:  Begin inventory of collections, starting with museum collections on exhibit. (multi-year project)	Collections:  Use accession log book to record donations.
Supports Mission	✓	✓	✓	✓	✓
Strategically moves us forward	✓	✓	✓	✓	✓
Achievable with current staff and volunteers without placing unreasonable demands on their time/energy.	Work with designer.	Would benefit from having Board or Friends group participation.	Would be more successful with a facilitator.	Yes	Yes
Can be financed without cutting funds allocated to current on-going activities	Cost of design work and printing and production.	No cost or minimal cost for materials.	Cost of facilitator.	A working laptop and digital camera or iPhone are required.	Cost of purchasing accession log book.
Provides an educational or community relations opportunity	✓	✓	✓	✓	✓

## Strategic Plan: Year Two

Evaluation Criteria	Action Step 1	Action Step 2	Action Step 3	Action Step 4	Action Step 5	Action Step 6	Action Step 7
	Governance:  Provide training to board members on roles and responsibilities.  (ongoing)	Governance:  Ad hoc committee to write policies.  (ongoing)	Development:  Review use of endowment and investment policy.	Development:  Develop fundraising plan.	Outreach:  Identify underwriting opportunities for free admission, naming rights, etc.	Marketing:  Redesign membership materials and EHHS brochure.	Marketing:  Create new outdoor signage.
Supports Mission	✓	✓	✓	✓	✓	✓	✓
Strategically moves us forward	✓	✓	✓	✓	✓	✓	✓
Achievable with current staff and volunteers without placing unreasonable demands on their time/energy	Training programs are available for varying cost.	Yes	Yes	Yes, unless board decides to bring in a consultant to help develop a fundraising plan.	Yes, unless it makes sense to work with fundraising consultant.	Work with designer.	Work with designer.
Can be financed without cutting funds allocated to current on-going activities	Budget annually for training costs for board and museum manager.	No cost.	No cost.	Possible cost of consultant	No cost unless EHHS works with consultant.	Cost of design, production, and printing.	Cost of design, production, and printing.
Provides an educational or community relations opportunity	✓	✓	✓	✓	✓	✓	✓

**Strategic Plan: Year 2 (continued)**

Evaluation Criteria	Action Step 8	Action Step 9	Action Step 10
	Exhibitions:  Embark on multi-stage reinterpretation of exhibit galleries.	Collections:  Budget annually for acid-free supplies for collections.	Collections:  Continue inventory of collections, starting with museum collections on exhibit. (multi-year project).
Supports Mission	✓	✓	✓
Strategically moves us forward	✓	✓	✓
Achievable with current staff and volunteers without placing unreasonable demands on their time/energy.	Requires outside consultants.	Yes.	Yes
Can be financed without cutting funds allocated to current on-going activities	Cost of consultants.	Budget around \$500/year for storage supplies for museum collections and archives/	Yes.
Provides an educational or community relations opportunity	✓	✓	✓

### Strategic Plan: Year Three

Evaluation Criteria	Action Step 1	Action Step 2	Action Step 3	Action Step 4	Action Step 5	Action Step 6	Action Step 7
	Governance:  Collect new policies in a board handbook, along with orientation materials, job descriptions of officers, committee chairs. Provide copies to all board members.	Governance:  Develop multi-year preservation and maintenance plan for buildings and grounds.	Development:  Develop donor cultivation plan.	Development:  Set goals for meeting fundraising and income levels to reduce use of endowment.	Outreach:  Identify and share local stories that will resonate with the community (via programs, exhibits, etc.)	Marketing:  Create marketing plan to expand reach and support of EHHS.	Marketing:  Research and develop merchandise that supports EHHS.
Supports Mission	✓	✓	✓	✓	✓	✓	✓
Strategically moves us forward	✓	✓	✓	✓	✓	✓	✓
Achievable with current staff and volunteers without placing unreasonable demands on their time/energy.	Yes	May require estimates from outside contractors.	Yes, unless fundraising consultant is used to develop plan.	Yes, unless a consultant is used to develop plan.	Yes	Yes, unless a consultant is used to develop plan.	Yes
Can be financed without cutting funds allocated to current on-going activities	Budget for copying costs and 3-ring binders.	Cost will be outside annual budget for some items.	Possible cost of consultant.	Cost of possible consultant.	Yes, depending on the program or outreach developed.	Cost of possible consultant.	Cost for design and production.
Provides an educational or community relations opportunity	✓	✓	✓	✓	✓	✓	✓

**Strategic Plan: Year 3 (continued)**

Evaluation Criteria	Action Step 8	Action Step 9	Action Step 10	Action Step 11
	Exhibitions:  Embark on multi-stage reinterpretation of exhibit galleries.  (ongoing)	Collections:  Budget annually for acid-free supplies for collections.  (ongoing)	Collections:  Continue inventory of collections, starting with museum collections on exhibit. (multi-year project).	Collections:  Upgrade collection storage to meet access and preservation standards.
Supports Mission	✓	✓	✓	✓
Strategically moves us forward	✓	✓	✓	✓
Achievable with current staff and volunteers without placing unreasonable demands on their time/energy.	Requires outside consultants.	Yes.	Yes	Yes, unless its determined that a consultant familiar with collection storage is needed.
Can be financed without cutting funds allocated to current on-going activities	Cost of consultants.	Budget around \$500/year for storage supplies for museum collections and archives/	Yes.	Cost for consultant, building and storage materials.
Provides an educational or community relations opportunity	✓	✓	✓	✓

# IMPLEMENTING STRATEGIC PLAN

The following information regarding the implementation of the strategic plan needs to be decided upon by the East Haddam Historical Society Board of Trustees:

- Who is responsible for which action steps?
- When will the action steps be worked on (i.e. generate a timeline)?
- How much time will be budgeted for each action step?
- How much will the action cost and how will it be funded?
- How will success and progress be measured?

## Next Steps:

- The strategic plan should be shared with the Board of Trustees and museum manager.
- No plan is perfect, and all plans should be viewed as a work that is reviewed and revised regularly.
- The governing authority must approve the strategic plan.
- Celebrate and share what you've accomplished! Communicate regularly and effectively at board meetings, with staff, members, stakeholders, and community representatives about your plan, what stage of the plan you are working on, what happens next. Make sure that you are out front with what you are embarking on before gossip bursts your bubble!
- This is a new strategy. The strategic plan will not be successful if you continue to do things the way they have always been done. A new strategy means new priorities and new activities.
- Consider if the current structure of the organization will align with the new goals and action steps. If not, consider what changes can and should be made.
- The Board of Trustees and museum manager must understand the strategic plan and be prepared to be actively engaged in its implementation for it to succeed.
- Recognize that a strategic plan involves change. Change can be difficult, and people often resist change. Accept that this could be a challenge and work together to address the challenges and to implement the changes that will benefit the organization.

# LIST OF APPENDICES

1. Questions to Consider When Developing Your Museum Brand
2. Accession Log-Book ordering information
3. Sample Inventory Headings with Descriptions
4. Collection Registration
5. 7 Steps to Good Collection Management
6. 7 Steps to Good Collection Management – Museum & Archives
7. Samples Documents from the American Alliance of Museums
8. Sample Table of Contents for a Collection Management Policy
9. Litchfield Historical Society Incoming (Temporary) Object Receipt
10. Contents of Trustee Handbook
11. Kent Historical Society Collections Management Policy

# Questions to Consider When Developing Your Museum Brand

Kathy Craughwell-Varda, Museum Consultant

[vardaconsulting@aol.com](mailto:vardaconsulting@aol.com)

1. What is the purpose of your museum?
2. What does your museum provide for its audience/community?
3. Who are your 3 main competitors (direct or indirect)? What do you like about their presence? What do you dislike about their brand identity? This may seem too competitive for the museum world, but how do you set your museum apart from others.
4. What makes your museum different or unique from others? Is this of interest to your audience – new or existing?
5. Share 5 adjective or words that best describe your museum.
6. Is there a local landmark, event, area, etc. that would symbolize your museum in a logo?