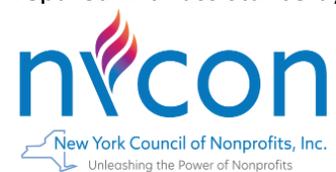




# Oswego County Historical Society Strategic Planning 2023-2025 Work Plan

Prepared with assistance by



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# Oswego County Historical Society Strategic Plan 2023

## 1. Organizational Background

### History and Operations

The Oswego County Historical Society (“OCHS “) was founded in 1896 following a successful celebration to recognize the 100th anniversary of the evacuation of the British from Fort Ontario and Oswego in 1796. Since that time the society has preserved and promoted the history of the greater Oswego community. It has collected and maintained thousands of artifacts, photographs and manuscript collections that document the county’s rich history. In 1946, the historical society received the generous gift of a historic 19th century Tuscan Villa style residence to serve as a permanent headquarters and public museum. Since that time OCHS has owned and operated the Richardson-Bates House Museum. This distinctive residence offers a unique glimpse into the opulent lifestyle of a prominent Oswego family. It also serves as a museum dedicated to interpreting the history of the people, places and events of Oswego County through exhibits and educational programs.

Today in 2023 OCHS operates with one part-time Museum Assistant, and a board of trustees of twelve.

### Overview of the Planning Process

In the spring of 2023, OCHS embarked upon a strategic planning process to lay the groundwork for the organization’s future. Funding was provided by the Documentary Heritage and Preservation Services for New York program, and the planning process was facilitated by Barbara Paxton from the New York Council of Nonprofits (NYCON). A strategic planning committee was established, led by OCHS President Mary Kay Stone.

The planning process included input from both board members and active volunteers through an online survey that provided the opportunity for participants to reflect upon the organization’s mission and values; develop a vision for the organization; undertake an assessment of the organization’s internal strengths and weaknesses as well as external opportunities and threats; and to begin to identify action items to accomplish that vision.

The full survey report was shared with members of the strategic planning committee prior to a retreat session for trustees and other volunteers held on June 11, 2023, led by Barbara Paxton. This session provided participants the opportunity to identify priorities and set the Society’s course for the next three to five years.



## **2. Key Strategic Issues, Suggested Goals & Strategies:**

- 1) **Collections Care, Management, and Access**  
Goal: Strive for continuous improvement of collections stewardship and maintain coordinated archiving system with conservation, proper storage, and preservation
  
- 2) **Facilities Management**  
Goal: Strive for continuous improvement of collections stewardship; maximize the use of the collection and its historic home
  
- 3) **Programs**  
Goal: Strengthen programming to increase use of the house and campus, audience engagement, memberships, and financial support, and create community involvement.
  
- 4) **Revenue Generation and Fundraising**  
Goal: Strengthen organizational fundraising to ensure sustainability of OCHS and renovation of the building.
  
- 5) **Organizational infrastructure and leadership**  
Goal: To strengthen and maintain the organizational leadership, systems and structure needed to sustain a growing organization.

### 3. Mission, Vision, and Values

#### Mission

##### Current Mission:

The Oswego County Historical Society (OCHS) is a non-profit corporation organized with a mission to discover, to collect, to preserve and to interpret materials and objects germane to the history of Oswego County, to sponsor writings, publications, and to promote public interest in Oswego County's historical resources.

##### **Proposed Mission(s) for board discussion and consideration:**

OCHS interprets the stories of Oswego County to connect the community to past, present and future issues relevant to history. We discover, collect, preserve and interpret materials and objects germane to the history of Oswego County, to sponsor writings, publications, and to promote public interest in Oswego County's historical resources.

##### **Adapted Mission statement at board meeting 11.13.23**

The Oswego County Historical Society seeks to interpret its collections to connect the community to past, present and future topics relevant to local history, and to promote a public interest in Oswego County's historical resources.

#### Vision

##### Proposed Vision:

The Oswego County Historical Society:

- *Is regarded as the premier local resource for education and information about the entirety of Oswego County, its culture, history, and social development.*
- *Is dedicated to the preservation of Oswego County's history through its programs, archives, and museum.*
- *Tells the stories of all of the county's peoples, including Black, First Nation and Immigrant populations.*
- *The OCHS is an excellent steward of the RB House, its gardens and the archives contained in it.*

#### 4. Environmental Analysis (S.W.O.T.)

Internal Strengths	Internal Weaknesses/Areas of Improvement
<ul style="list-style-type: none"> <li>● Volunteers, dedicated people</li> <li>● Strong leadership/Strong &amp; active board</li> <li>● Good “advertisement” to keep our community aware of our accomplishments. Strengthened social media presence</li> <li>● Collaborations with community organizations, schools and museums.</li> <li>● Give people visit opportunities at the museum.</li> <li>● General willingness to move organization forward; initial utilization of technology to improve and support goals.</li> <li>● Dedication of staff (one paid, rest volunteers)</li> <li>● Student Interns bringing a wide variety of skills and strengths</li> <li>● Historic Richardson Bates House</li> <li>● Knowledgeable educators &amp; tour guides</li> <li>● 30,000 artifacts in the collections relating to Oswego County history</li> <li>● Completion of many short and medium-term goals outlined in the 2018 Archival Needs Assessment.</li> <li>● There are a variety of opinions and ideas generated by the board and volunteers regularly. Issues are frequently discussed from all angles, and all facets of a problem are debated.</li> <li>● Volunteers in facilities maintenance who are evaluating the building and discovering many hidden problems, but fixing many of them for free.</li> <li>● Financial stability and a good reserve fund from a stock donation we received about 7 years ago.</li> <li>● We have a high success rate with grant applications.</li> </ul>	<ul style="list-style-type: none"> <li>● Access to the museum is somewhat limited/ Physical space limitations.</li> <li>● Challenging Board members.</li> <li>● Ongoing need for funding to keep the museum going, and people willing to search out those funds.</li> <li>● Responsibilities are focused on a few people.</li> <li>● Aging volunteer workforce</li> <li>● Lack of a full time professional director (due to lack of funding).</li> <li>● Much needed maintenance of RB House – many deferred projects; lack of funds.</li> <li>● Board member succession; little turnover. Risk of burnout.</li> <li>● Lack of adequate, safe, archival storage for collections.</li> <li>● OCHS is generally uncoordinated—there is a lack of established roles and responsibilities that leads to different expectations of volunteers.</li> <li>● Not agile (planning events, budgeting, newsletter, etc.)</li> <li>● Stuck in our ways. "We've always done it this way." Though this has begun to change, key players still echo this sentiment and there's still a long way to improve on this front.</li> <li>● Our permanent exhibit is forty years old and very dated in its approach.</li> <li>● No definition of volunteer roles, and board and committee job descriptions.</li> </ul>

## S.W.O.T Analysis (cont.)

External Opportunities	External Threats
<ul style="list-style-type: none"> <li>• More creative programming and fundraising</li> <li>• Eyes on Oswego               <ul style="list-style-type: none"> <li>• First, the renaming of Fort A. P. Hill in Virginia to Fort Walker/dedication of the 2024 quarter to Dr. Walker</li> <li>• New Micron plant in Syracuse may increase local tourism and a boost to Oswego's economy in general. National Marine Sanctuary area, and nearby Fort Ontario National Park</li> </ul> </li> <li>• Digital resources during tours               <ul style="list-style-type: none"> <li>• Five minutes on Doors and Door Knobs</li> </ul> </li> <li>• Corporate sponsorships (newsletter, website)</li> <li>• Better use of the garden/grounds</li> </ul>	<ul style="list-style-type: none"> <li>• Declining attendance</li> <li>• Relative poverty of Oswego County</li> <li>• Lack of public/government support</li> </ul>

## 5. Strategic Work Plan

### 1. Collections Care, Management, and Access

Goal: Strive for continuous improvement of collections stewardship and maintain coordinated archiving system with conservation, proper storage, and preservation

Strategy	Action	Responsible	TIMELINE			Resources/Cost
			2023	2024	2025	
1.1 Maintain system and policy for proper care and data management	1.1.1 Continue to enter collections into excel system aiming to finish the House inventory	Evie & Mary Kay	Ongoing	Ongoing	Ongoing	Volunteers
	1.1.2 Create a system for evaluating and prioritizing the various collections	Evie & Mary Kay	Ongoing	Ongoing	Ongoing	
	1.1.3 Enter collections into Past Perfect	Evie	Ongoing	Ongoing	Ongoing	
	1.1.4 Continue digitizing documents	Evie & Mary Kay	Ongoing	Ongoing	Ongoing	
	1.1.5 Create plan for inventorying the objects in the house	Collections Committee	xx			
	1.1.6 Create a program to recruit and train volunteers to assist with this work	Board	xx			
1.2 Assure proper conservation and appropriate storage of archives including art and other object collection	2.2.1 Prepare list of archive storage locations, evaluate and prioritize for proper conditions (climate, pest control, etc.)	Collections Committee		xx		
	2.2.2 Evaluate cost and method of preserving the collection's uncatalogued documents and objects in the basement	Collections Committee		xx		
	2.2.3 Evaluate cost and method of preserving the collection's uncatalogued documents and objects in the servants attic	Collections Committee		xx		
	2.2.4 Evaluate cost and method of preserving the collection's uncatalogued objects Tower	Collections Committee		xx		
	2.2.5 Continue to work to find/create off-site storage	Mary Kay			xx	
	2.2.6 Prepare an emergency/disaster plan for the Society's collection.	Neal	xx			

Strategy	Action	Responsible	TIMELINE			Resources/Cost
			2023	2024	2025	
Create/strengthen collections policies	1.3.1 Accession backlog of donated items.	Collections Committee		xx	xx	
	1.3.2 Create deaccessioning plan; begin deaccessioning collections not relevant to Oswego County history	Collections Committee			xx	
	1.3.3 Strengthen the museum's permanent collection by creating a collection development plan	Collections Committee			xx	
	1.3.4 Add collections policy to the website	Evie	xx			
	1.3.5 Ensure that policies prioritize telling the stories of populations currently under represented (Native Americans, Blacks, Asians, etc.)	New Committee		xx		
	1.3.6 Cultivate relationships to assist in building the permanent collection, and deaccessioning irrelevant materials and objects	Board leadership		xx		

## 2. Facilities Management

Goal: Strive for continuous improvement of collections stewardship; maximize the use of the collection and its historic home

Strategy	Action	Responsible	TIMELINE			Resources/Cost
			2023	2024	2025	
2.1 Improve the condition of the Richardson-Bates House and its contents to improve working conditions and ensure its preservation	2.1.1 Assess facilities and structural assets of the organization – Reapply for grant	Board		xx		
	2.1.2 Consider forming a “Facilities” committee to help oversee responsibility for a prioritized maintenance schedule of physical plant.	Board to create a committee	xx			
	2.1.3 Assess current status and develop a list of equipment and technology needs (phones, lighting, POS system, smart boards, large monitor/screens, etc.)	Facilities Committee	xx			
	2.1.4 Research and prioritize obtaining insurance	Treasurer		xx		\$\$\$
	2.1.5 Focus on making better use of the garden	Eva/Garden Society		xx		
2.2 Maximize use of permanent collection, archives galleries, museum campus including art and other object collection	2.2.1 Make the collections more accessible digitally					
	2.2.2 Create virtual tours or moments for view on the website and visitors who cannot access the higher floors	Interns w/Evie supervision	xx			
	2.2.3 Explore making the garden as part of the exhibits, focusing on the recent archaeological dig or family’s garden	Garden Committee			xx	
	2.2.4 Update/change the exhibit in the permanent gallery	Student Intern/ Collections Cttee	xx		xx	Quick fixes to address outdated language precede longer term plaing

### 3. Programs

Goal: Strengthen programming to increase use of the house and campus, audience engagement, memberships, and financial support, and create community involvement.

Strategy	Actions	Responsible	TIMELINE			Resources
			2023	2024	2025	
3.1 Regularly evaluate programs and exhibits; create new programming	3.1.1 Ensure programming communicates that the organization is more than just the Richardson-Bates House Museum.	Board		xx		Create volunteer committees. that accomplish discrete, identifiable tasks
	3.1.2 Reflect on the possibility of changing things, not only the permanent exhibit.	Board		xx		
3.2 Increase diversity and accessibility of programming to engage the broader community	3.2.1 Create plan to assess the spaces in the house and their optimum utilization	Board				
	3.2.2 Develop new, online and year-round programming	Board				
	3.2.3 Partner with History on Tap	Board				
	3.2.4 Create programs in the garden (e.g. Yoga)	Board				
	3.2.5 Create education programing (lecture, book readings, etc.)	Board				
3.3 Take advantage of Dr. Walker's year.	3.3.1 Resolve issue of displaying her medal	Done	xx			
	3.3.2 Create marketing plan/web page					
	3.3.3 Create programs about her and her times	MK				Working with Town working group

## 4. Revenue Generation and Fundraising

Goal: Strengthen organizational revenue model to ensure sustainability and renovation of the building.

Strategy	Actions	Responsible	TIMELINE			Resources
			2023	2024	2025	
4.1 Strengthen resource development structure	4.1.1 Create a donor list and create a plan to establish sustainable donors	Membership Committee		xx		
	4.1.2 Create events to bring new potential donors to the house and thank donors (and members) who step up	Membership Committee		xx		
	4.1.3 Create annual fundraising plan	Membership Committee		xx		
	4.1.4 Continue to research grant opportunities	Mary Kay and Evie	xx			
	4.1.5 Evaluate building renovation needs, determine costs, set priorities	Facilities Committee		xx		
	4.1.6 Create a planned giving campaign	Membership Committee		xx		
4.2 Increase contributed income	4.2.1 Create new fundraising programming using the house and garden	Membership Committee				Recruit volunteers for specific events
	4.2.2 Consider new events with appropriate volunteer leadership assigned to oversee execution	Board		xx		
	4.2.3 Evaluate “friend raising” v. fundraising, and maximize revenue for the latter	Board		xx		
4.3 Increase earned revenue	4.3.1 Engage in a more aggressive membership campaign; create benefits for larger donors	Membership Committee	xx			
	4.3.2 Increase rental income	Board			xx	
	4.3.3 Expand fee-based education and programming	Board			xx	

## 5. Organizational infrastructure and leadership

Goal: To strengthen and maintain the organizational leadership, systems and structure needed to sustain a growing organization, OCHS will utilize and develop volunteers to accomplish its mission.

Strategy	Actions	Responsible	TIMELINE			Resources/Cost
			2023	2024	2025	
5.1 Strengthen trustee structure, engagement, and sustainability	5.1.1 Develop job descriptions and expectations for trustees, including resource development	Board	xx			
	5.1.2 Develop a routine and ongoing approach to board recruitment and nominations	Board		xx		
	5.1.3 Create a board code of conduct	Board		xx		
	5.1.4 Review bylaws and other governing documents for compliance with bet practices and NYS law	Board				
	5.1.5 Review committee structure	Board		xx		
	5.1.6 Establish a succession plan for officers	Board			xx	
	5.1.7 Provide trustees with ongoing learning opportunities	Board			xx	
5.2 Build an inclusive board that reflects OCHS's constituent and contributes needed skills and resources	5.2.1 Identify areas where OCHS is lacking in skills, personal attribute and resources. Maintain a profile matrix for use in building the board.	Board		xx		
	5.2.2 Allow non-board members to serve on committee and task forces to develop a pipeline of new trustees	Volunteer leadership committee	xx			
5.3 Strengthen overall volunteer program and structure	5.3.1 Create Volunteer management and recruitment approach	Board	xx			
	5.3.2 Define volunteer roles, tasks and projects	Volunteer leadership committee		xx		
	5.3.3 Create recruiting strategy, including public notices, relationships with educational programs, etc.	Board		xx		
	5.3.4 Create training programs	Volunteer leadership committee		xx		