



**THE HISTORICAL SOCIETY OF HARFORD COUNTY,  
INC.  
STRATEGIC PLAN  
2017-2020**





# Strategic Plan 2017-2020

## INTRODUCTION

The following Strategic Plan was adopted by the Historical Society’s Board of Trustees to provide a guide for the Society over the next several years and to assist the Society as it attempts to meet a series of goals and objectives identified by members, consultants and advisors during the past year. While it is not possible to address all issues in a single document, the Plan is intended to provide broad guidelines and specific actions needed to address the challenges and seize the opportunities available to the Society as it seeks to fulfill its Mission.

President’s Signature: \_\_\_\_\_

Approved and Adopted: \_April 4,  
2017\_\_\_\_\_



# Strategic Plan 2017-2020

## **Vision:**

The Historical Society of Harford County, Inc. seeks to be the preeminent and most user-friendly source for an individual to obtain historical information about the county and genealogical information about its inhabitants.

## **Mission:**

The Historical Society of Harford County, Inc. collects, preserves, promotes, and interprets the rich and diverse history of the Harford County area in its regional context from prehistoric origins to the present for the education and enjoyment of current and future generations.

## **Values:**

The Historical Society of Harford County, Inc. fosters an environment where everyone is treated with dignity and respect and those seeking information are provided a rewarding and educational experience. Material in the possession of the Society will be preserved with care. The Society embraces technology to further these values.

The Board of Trustees developed and approved the aforementioned Vision, Mission and Values statements and the following Strategies to ensure the long-term viability of The Historical Society of Harford County (Society) and to identify the steps necessary to accomplish the identified strategies.



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## Goal 1: Building Restoration

### Objective:

Provide state of the art facilities (Headquarters and Hays House Museum) to display, store and protect the archives and artifacts that tell the story of Harford County and its people

### Tasks:

- Continue seeking funding to address Headquarters building deficiencies and improvements to the Hays House Museum
- Complete planned restoration projects including:
  - Repair parking lot
  - Paint/scrape the front trim, take down the airlock on the front of the building, repair and paint door
  - Raise matching funds for \$50,000 Bond Bill and restore windows
  - Raise funds to repair Metal Overhang in the rear of building
  - Identify repair projects, raise funds and make repairs at the Hays House Museum (which includes painting and a new roof)
- Continue restructuring and organizing the Society basement for storage and archive materials
- Gather information and begin process of installing museum space
- Identify remaining building restoration needs and seek funding to complete projects, i.e. interior repairs, painting, exhibit and storage area requirements, basement improvements

### Responsibility:

Facilities committee, Building Campaign Restoration Committee, Events Committee, Finance Committee



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## **Timeframe:**

The following projects are to be completed by the end of April 2017; parking lot repair and utilization of the Façade Improvement Grant. Raise Bond Bill matching fund by Dec. 2017. Other projects will be an ongoing activity of the Society.

## **Goal 2: Building Maintenance**

### **Objective:**

Achieve ongoing maintenance of the Society's Facilities

### **Tasks:**

- Schedule meeting of Bldg. Restoration committee
- Identify annual maintenance projects
- Discuss costs with Finance Committee
- Schedule maintenance projects

## **Goal 3: Fundraising Initiatives**

### **Objective:**

Increase funds available for use by the Society both for operating and capital projects

### **Tasks:**

- Establish Fund raising Committee
- Evaluate possibility of hiring a professional fundraising organization
- Establish corporate donor/sponsorship program and add to website
- Continue to develop donor program and follow up procedures
- Review annual giving process



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Continue active grant writing program seeking additional funding for ongoing capital projects, special projects and operational activities where applicable

- Review current events for appropriateness and develop ideas for new fundraising events
- Identify potential corporate donors and potential individual/foundation donors
- Create marketing materials packet to leave with potential major donors

## Goal 3: Fundraising Initiatives (continued)

### Responsibility:

Membership Committee/Events Committee/Website Management Committee/ Executive Committee/  
Fund- raising Committee

### Timeframe:

The corporate donor/sponsorship program should be developed by Spring 2017. Other tasks will be ongoing.

## Goal 4: Budget & Finance

### Objective:

Create easily understandable and streamlined financial system

### Tasks:

- Modify trial balance accounts to ensure income/expenses on projects are clearly stated
- Include trial balance account numbers on check request forms.
- Submit time sheets on time as directed by the employment agreement.
- Review annual known expenses (building, parking lot, Hays House, etc.)
- Develop Capital (5 yr.) and separate operating budget (1 yr.)
- Develop a clear, detailed budget for necessary expenditures



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Review and revise guidelines on disbursing income from investment funds

- October 1<sup>st</sup> of each year will be the deadline for submitting requests for funding
- Identify alternative services to increase funding

## Responsibility:

Finance Committee/Executive Committee/Board of Trustees/staff

## Timeframe:

Most of the Finance and Executive Committees initiatives are ongoing in nature. Operating budget items to be submitted no later than October 1<sup>st</sup> each year. Capital budget completed by September 2017.

## Goal 5: Technological Facilities and Services

### Objective:

Ensure the Society keeps pace with the technological needs of its members and visitors

### Tasks:

- Establish needs for upgrades, improvements, new equipment and prioritize
- Identify individuals for technological responsibilities
- Continue to use website to raise funds through donations, membership drives, genealogical resources, etc.
- Routinely review and update Society website
- Optimize use of Social Media to generate interest in Society and its resources
- Add Microsoft packages to staff and library computers

### Responsibility:

Technology Oversight Committee (Webmasters, Past Perfect coordinator and Website management committee)

### Timeframe:

This is an ongoing effort.



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## Goal 6: Marketing

### Objective:

Ensure the long-term viability and visibility of the Society. To create and share relevant and valuable information that attracts, educates, motivates, and inspires members/supporters so that they can help achieve the Society's mission

### Tasks:

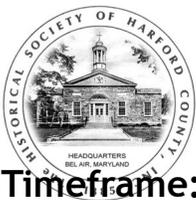
- Establish Marketing Committee
- Assign responsibility for dissemination and coordination of publicity of materials
- Update media contact list annually

## Goal 6: Marketing (continued)

- Develop a strong publicity program ensuring that all events and exhibits are broadcast to the widest audience possible.
- Include publicity materials on the Society's website
- Add names and pictures of Board of Trustees and staff to the website
- Create donor/sponsorship information materials
- Create social media policy
- Use the quarterly bulletin and bi-monthly newsletters to highlight the Society's accomplishments and to satisfy its goal of improving programs and services
- Explore possibility of sending weekly or biweekly emails to membership
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### Responsibility:

Marketing Committee/Publicity/staff



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## Timeframe:

The search for corporate donors/sponsors will begin immediately. All tasks will be an ongoing effort.

## Goal 7: Day to Day Operations & Administration

### Objective:

Ensure the daily operations of the Society run smoothly creating a pleasant and inviting environment for members, volunteers and residents of the community. Evaluate and develop procedures to maximize operational efficiency of the organization.

## Goal 7: Day to Day Operations & Administration (continued)

### Tasks:

- Director will prepare a detailed monthly report with projects and responsibilities for Executive Committee
- Develop a Board of Trustees Manual and an Employee Manual
- Schedule Board orientation dates for 2017 and 2018
- Consider assigning one member of the Executive committee for each day of the week to handle major issues and oversee work in progress.
- Develop procedures for acceptance and recordation of donated items.
- Develop comprehensive inventory of collection
- Detail and complete facility organization projects



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Explore possibility of using professional cleaning crews for headquarters and Hays House

- Explore possibility of expanding hours of operation especially more evening hours
- Evaluate Bylaws for necessary updates at least annually
- Monitor progress on the Strategic Plan recommendations quarterly
- Maintain spreadsheets on each event, grant, etc. as a checks and balance function on finances and to determine effectiveness of events and fundraising efforts
- Clearly establish responsibilities of the Director, Administrative Assistant and volunteers
- Develop year-round exhibit program at Hays House and Headquarters
- Continue update of Procedures and Policies Manual
- Appoint Board members and volunteers to all established committees based on interest and time availability
- Evaluate staffing and compensation annually

## Responsibility:

Administration/Executive Committee/Artifacts/Archives/Board of Trustees

## Timeframe:

These efforts will begin immediately and become ongoing projects.

## Goal 8: Volunteers/Interns

### Objective:

Attract and maintain a well-trained strong volunteer pool for both the Society Headquarters and the Hays House Museum.

### Tasks:



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Create volunteer handbook which includes job descriptions and volunteer policy detailing chain of command, termination, confidentiality and liability

- Ensure all volunteers receive a copy of the volunteer handbook
- Increase number of volunteers and times available for volunteer participation
- Develop a young adult social arm of the Society- similar to the Young Defenders group at the Maryland Historical Society.
- Conduct an annual volunteer event to showcase volunteer opportunities and attract new volunteers
- Provide a welcoming environment for visitors and a nurturing environment for volunteers
- Schedule dates of 2017 Volunteer Orientations (quarterly). Dept. heads can provide further training if needed.
- Continue to recruit volunteers, including contacting local schools, teen volunteer programs and senior centers. A goal is to attract younger volunteers.
- Explore process of applying for interns from local colleges and universities.

## Responsibility:

Volunteer Committee, Hays House Museum Committee, Events Committee/Marketing Committee/staff

## Timeframe:

Volunteer handbook to be developed by June 2017. Other efforts are ongoing.

## Goal 9: Gift Shop



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## Objective:

Enhance the current gift shop with more resources and collectibles for members and visitors

## Tasks:

- Identify items and resources to be added to the gift shop
- Include more local authors and works of local artists
- Include mementoes with local connections for visitors to the County
- Identify and create items produced by the Society
- Develop procedures for Gift shop operations

## Responsibility:

Gift and Book Shop Committee, Hays House Museum Committee, Marketing Committee/staff

## Timeframe:

Initial ideas to be proposed by July 2017. Efforts are ongoing.

## GOAL 10: PROGRAMMING, EVENTS & COMMUNITY OUTREACH & EDUCATION

## Objective:

Coordinate activities and events to implement the Society's Vision and Mission and assure maximum attendance

## Tasks:

- Identify and enact strategies to increase membership
- Provide the general public with information about the county's history in inventive ways that will entertain and educate
- Develop educational programs for various demographics
- Make an effort to attract members of varied ages



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Identify and create events that highlight Harford's history and are of interest to a wide-ranging audience

- Coordinate more fully with other organizations, i.e. state and local historical societies and programs, local museums, the Bel Air Downtown Alliance, local cultural arts groups, etc.
- Develop and promote a Society Speakers Bureau which will be available to give presentations at area schools, libraries and community organizations
- Identify and implement activities and events that help fund the Society's operations
- Showcase the Society's collections to spread information about the county's past and the people who lived, worked and played here over time.

## **Responsibility:**

Events Committee/Marketing Committee/ Artifacts/Archives

## **Timeframe:**

Efforts are ongoing