

Organizational Background:

The Schuyler County Historical Society located in Montour Falls, Schuyler County, New York, just south of Watkins Glen and Seneca Lake in the Finger Lakes Region. The Society maintains three properties and is headquartered at the Brick Tavern Museum, a large brick Federal-style building built in 1828 and listed on the National Register of Historic Places. The Brick Tavern Museum and the adjacent Wickham Rural Life Center have exhibits relating to Schuyler County's rich history. Our collections include artifacts, books and documents concerning the county's people and events, valuable to genealogists and researchers. The Lee School Museum, a one-room school on Route 14 south of the Brick Tavern Museum, is also on the National Register of Historic Places.

Starting in the Summer of 2023, the Schuyler County Historical Society 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 of New York program and the planning process was facilitated by the New York Council of Nonprofits (NYCON).

The planning process included an online survey to solicit input from both board members and active volunteers through an online survey that provided opportunity for participants to reflect upon the organization's mission and values; develop a vision for the organization; undertake a S.W.O.T. Analysis and 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 resulting draft strategic work plan will be reviewed and revised by the Board of Trustees into a final document that will serve as a living document, driving organizational decision making and providing a shared roadmap for the organization's success. It presents a strategic vision for the organization that will work to inform organizational culture and board decision-making as the organization addresses Key Strategic Issues identified during the planning process, and the suggested goals & strategies submitted in this report.

Mission of the Schuyler County Historical Society:

The Schuyler County Historical Society preserves our cultural and structural heritage by documenting and sharing our stories to inspire and engage current and future generations.

Vision of the Schuyler County Historical Society:

Schuyler County Historical Society will be the primary steward of our county's history and heritage through interactive and engaging programs, exhibits, and services.

Values of the Schuyler County Historical Society

- Stewardship- preservation
- Respect- inclusivity
- Accessibility- collections & facility
- Accountability- professionalism & accuracy

Outcomes: On September 5th, and September 25th, Schuyler County Historical Society Staff and Board met with NYCON, in partnership with DHPSNY, to conduct a strategic planning process meant to enhance collections, visitor experiences, community collaboration, engagement, and priorities. At these meetings, several internal and external subjects were discussed at length allowing us to identify several key strategic issues which in turn inform the goals.

Strategic Issues:

Strategic Issue #1- Collections Care, Management & Access. GOAL: Schuyler County Historical Society will define and continuously improve upon policies and practices needed to provide responsible collection stewardship by maintaining coordinated archiving systems of organization, storage, conservation, and preservation.

Strategic Issue #2- Revenue Generation, Fundraising & Memberships. GOAL: Schuyler County Historical Society will strengthen revenue generation to ensure raising monies for the organization.

Strategic Issue #3-Program, Community & Public Relations. GOAL: Schuyler County Historical Society will improve its relationships with community members, and potential donors by reaching them in a variety of ways.

Strategic Issue # 4- Operations & Human Resources. GOAL: Schuyler County Historical Society will utilize and develop the board, non-board volunteers, and staff to successfully accomplish its mission and remain a sustainable community resource.

Strategic Issue #5- Strategic Issue 5: Facility Maintenance and Repair: GOAL: Schuyler County will improve upon its physical spaces and facilities, creating more accessibility of their collection.

Staff & Board Acronyms

ED- Executive Director

A&F- Audit and Finance Committee

BOT- Board of Trustees

BD- Board Development Committees

Strategic Issue 1: Collections Care, Management, and Access

Goal: Schuyler County Historical Society will define and continuously improve upon policies and practices needed to provide responsible collection stewardship by maintaining coordinated archiving systems of organization, storage, conservation, and preservation.

Strategy	Action		Responsibility	Timeline			Resources
				Y1	Y2	Y3	
1.1 Evaluate/Update collection management plan.	1.1.1	Identify current collections management policies & priorities	ED	X			
	1.1.2	Develop clear collection focus areas and identify gaps in the collection.			X		
	1.1.3	Review current deaccession practices and revise to better align with focus areas	ED	X			
1.2 Assure proper storage and preservation, security & conservation of archives.	1.2.1	Review archive storage locations biannually, evaluate, and prioritize each for current proper conditions (climate control, pest control, etc.)			X		
	1.2.2	Research & purchase an advanced (collection) cataloging system				X	
1.3 Improve collection accessibility.	1.3.1	Upload the collections database online for public consumption				X	

Strategic Issue 2: Revenue Generation, Fundraising & Memberships <i>Goal: Schuyler County Historical Society will strengthen revenue generation to ensure raising monies for the organization.</i>							
Strategy	Action		Responsibility	Timeline			Resources
				Y1	Y2	Y3	
2.1 Strengthen resource development structures & committees.	2.1.1	Develop a planned giving program				X	
	2.1.2	Draft general policies/procedure for donor identification & cultivation			X		
	2.1.3	Determine the ROI, benefits, and cost models of a corporate sponsorship membership program.	ED	X			
	2.1.4	Identify and develop 5 new business/corporate partnerships within the county					
2.2 Diversify and strengthen membership into different areas of the County.	2.2.1	Identify an outreach plan that encompasses various areas of Schuyler County.	ED			X	
	2.2.2	Create a matrix of activities with the board (and volunteers) of varying ways to reach out personally to different groups of people			X		
	2.2.3	Solidify an engagement plan (that includes activity matrix) for the year including pre-planned activities	Could be a future goal			X	

Strategic Issue 3: Programs, Community& Public Engagement <i>Goal: Schuyler County Historical Society will improve its program effectiveness, goals, and strategies; improving relationships with community members by reaching them in a variety of ways.</i>							
Strategy	Action		Responsibility	Timeline			Resources
				Y1	Y2	Y3	
3.1 Engage the broader community to seek out partnerships and collaborations with appropriate community groups and schools.	3.1.1	Create curated community displays for local engagement/	ED	X			
	3.1.2	Utilize the momentum of current initiatives to create engagement with the Tourist App- Pocket Sights.			X		
	3.1.3	Engage in a community assessment for richer information and to find the needs/wants of the greater Schuyler County audience	ED	X			
	3.1.4	Create a Traveling Docent program				X	
	3.1.5	Identify and create a social media plan including parties responsible for content creation and frequency of posts.				X	
3.2 Establish a comprehensive community engagement and social media outreach plan.	3.2.1	Develop a targeted list of festivals, fairs, and community events for future collaborations	ED	X			
	3.2.2	Create regular meetings and communications with other towns and villages.			X		
	3.2.3	Create an approval process for social media created by non-employees		X			

	3.2.4	Engage in social media with scheduled posts 2x a month	Volunteers		X		
	3.2.5	Create lessons for local schools by outlining state guidelines met by the curriculum.				X	

Strategic Issue 4: Operations & Human Resource Capacity

Goal: Schuyler County Historical Society will utilize and develop the board, non-board volunteers, and staff to successfully accomplish its mission and remain a sustainable community resource.

Strategy	Action		Responsibility	Timeline			Resources
				Y1	Y2	Y3	
4.1 Strengthen overall volunteer program structure and development (job descriptions, training, and support), increasing the volunteer base.	4.1.1	Create a summary of ongoing organizational needs related to volunteers.	ED	X			
	4.1.2	Create a summary of volunteer needs (survey current volunteers)			X		
	4.1.3	Develop a routine training and onboarding system for volunteers			X		
	4.1.4	Identify new ways to recruit and attract, and retain volunteers			X		
4.2 Improve infrastructure of the board officers and committees.	4.2.1	Re-establish a Community Engagement and Development Committee.	ED	X			
	4.2.2	Regularly review the board infrastructure for officers			X		

		and committees at annual meeting, as well as					
	4.2.4	Review NYS Board of regent's requirements and nonprofit law.			X		
	4.2.4	Create an onboarding system with clear roles and expectations of board members and update annually, including virtual board manual.			X		
	4.2.5	Recruit diverse board (target legal expertise and youth)			X		
	4.2.6	Increase the board knowledge base (through various means) around current projects and collections.	BOD	X			
4.3 Strengthen staffing at all levels.	4.3.1	Research and create a staffing plan	BOD	X			
	4.3.2	Develop staff performance standards	BOD/ED	X			
	4.3.3	Hire a part-time staff position, according to staffing plan				X	

Strategic Issue #5- Strategic Issue 5: Facility Maintenance and Repair:							
<i>GOAL: Schuyler County will improve upon its physical spaces and facilities, creating more accessibility of their collection.:</i>							
Strategy	Action		Responsibility	Timeline			Resources
				Y1	Y2	Y3	
5.1 Improve upon and upgrade the existing spaces at each of the SCHS locations.	5.1.1	Create additional space for expansion, including accessibility upgrades for the second floor (grant contingent)				X	
	5.1.2	Install a Ramp at Lee School		X			
	5.1.3	Improve the Lawrence Chapel					
	5.1.4	Create plan for improving the parking at the main building and the Lee School				X	
	5.1.5	Create a plan for improving upon the Lawrence Chapel				X	
	5.1.6	Grant contingent- Improve interior floors, heating, painting and repointing, & addition with an elevator		X			
	5.1.7	Install a new heating system (grant contingent)			X		
5.2 Organize the main facility.	5.2.1	Maintain and update the back porch				X	
	5.2.2	Increase signage inside the facility				X	