

**MILTON HISTORICAL SOCIETY
STRATEGIC PLAN FOR 2009 – 2014 (Approved by Board 2/10/2009)**

CATEGORY/GOAL	ACTIVITIES	LEADER	TIMELINE
<u>Administration/Management:</u>			
1. Create and/or revise policies, procedures, and organizational structure to improve effective and efficient management of staff, docents, facility, Board members, and organization.	a) Approve/publish Strategic Plan	Betsy/Board	Q1 09
	b) Review Board committee structure – create new committees (e.g., Personnel, Audit, PR/Marketing, Development, Nominations, etc.)	Guy/Board	Q1 09
	c) Create org chart	Betsy	Q1 09
	d) Review/revise employee handbook	Betsy/Cori/Sue	Q1 09
	e) Revise annual report	Martha/Cori	Q1 09
	f) Develop/conduct training for Board members	Martha/Serena/Sue	Q2 09
	g) Review/revise/approve by-laws and articles of incorporation – submit to county, state as necessary	Joan/Betsy/Board	Q2 09
	h) Develop crisis management plan	Cori	Q4 09
2. Increase staffing to relieve ED and AED of less important tasks and allow for focus on innovation and improvements; improve effectiveness of volunteers and paid docents.	a) Hire interns by:		
	a. Contacting UWW, Beloit College, Edgewood, UW-Madison, UW-Milw re: potential for spring/fall interns	Cori	Q1 09 (IP)
	b. Working w/UW-Mad library school to determine possibility	Martha/Cori	Q3 09
	b) Review job descriptions/time management for staff – who does what, back-ups, etc.	Betsy/Cori/Sue	Q1 09
	c) Reassess staffing needs/Recruit & hire:	Cori/Sue/Betsy/Board	
	a. Docent Supervisor for summer (adult)		Q2 09
	b. Office support staff		Q3 09
	c. Volunteer Coordinator (paid?)		Q4 09
	d. Cleaning Staff/Maintenance		2010
	e. Curator		2012
	d) Further develop docents by:		
	a. Revising docent policy manual	Sue	Q1 09
b. Recruiting/screening summer docents	Sue/Cori	Q2 09	
c. Conducting training for docents	Sue/Cori	Q2 09	
d. Auditing tours given by new docents	Sue/Cori	Q2 09	

	<ul style="list-style-type: none"> e) Support more professional development for ED and AED, such as tourism conventions (budget) f) Increase recruiting for volunteers/docents – target theater groups, history classes, musicians, choruses? g) Develop/conduct volunteer workshops h) Upgrade technology/apply for research grant for hardware and software 	<p>Board</p> <p>Cori/Vol Coord</p> <p>Cori/Vol Coord</p> <p>Martha/Cori</p>	<p>Q4 09</p> <p>2010</p> <p>2010</p> <p>2010</p>
3. Improve financial management to reduce costs, increase efficiencies and ensure compliance with appropriate accounting standards.	<ul style="list-style-type: none"> a) Conduct audit of financial records b) Implement new credit card procedures c) Review/re-class NOW account fund d) Review/revise/document financial duties of ED, AED, and Treasurer e) Explore ways to involve committee to assist with financial management f) Review current cash controls and processes to improve efficiencies and assure security/dual control of funds 	<p>Audit Committee</p> <p>Betsy/Sue</p> <p>Betsy/Board</p> <p>Betsy Betsy/Cori/Sue</p> <p>Betsy/Cori</p> <p>Finance Committee</p>	<p>Q1 09</p> <p>Q1 09</p> <p>Q1 09</p> <p>Q2 09</p> <p>Q4 09</p> <p>2010</p>
4. Consider accreditation through IMLS.		Board	2011
<u>Education:</u>			
1. Promote and expand our educational offerings/resources, and develop additional activities and events to help educate people on why history is important, why they should contribute their time, talents, and money, and increase impact of Milton House experience.	<ul style="list-style-type: none"> a) Create Education Committee to develop comprehensive plan (possible members - Rod, Gordy, Tom, Janet Arnold) b) Increase awareness of UGRR meaning by: <ul style="list-style-type: none"> a. Creating signage/picture in entry way b. Creating a permanent UGRR display c. Developing a symposium for teachers d. Researching UGRR consultant to assist with process e. Contacting UGRR museum in Cincinnati c) Create/implement schedule of special/rotating exhibits and other educational programs (lectures/demos, professional art exhibit, travelers exhibit/grant, slavery, etc.) d) Team up with UW system to do joint classes, etc. – on-site and at UW campuses 	<p>Board</p> <p>Sue/Cori</p> <p>Cori/Education Comm</p> <p>Education Comm</p> <p>Cori/Education Comm</p> <p>Cori/Education Comm</p> <p>Education Comm</p> <p>Education Comm</p>	<p>Q2 09</p> <p>Q4 09</p> <p>2010</p> <p>2010</p> <p>2010</p> <p>2010</p> <p>Q4 09</p> <p>2010</p>

	<ul style="list-style-type: none"> e) Explore idea of partially self-guided tour w/recorders or headsets (risks – emergency exits, security, ins? Consider for special events?) f) Conduct re-enactments of UGRR and every room in museum (actors creating vignettes in rooms about anti-slavery, impending civil war, women's rights, etc.) – incorporate into Twilight Tours? 	<p>Education Comm</p> <p>Education Comm</p>	<p>2010</p> <p>2011</p>
2. Complete library to provide a comprehensive, comfortable research center and increase technology resources.	<ul style="list-style-type: none"> a) Complete plan/develop \$ needs b) Make current space usable with carpet/shelves c) Raise funds by: <ul style="list-style-type: none"> a. Developing list of potential donors b. Conducting fund-raisers d) Expand/add chairs, tables, DSL e) Complete library – computers, etc. f) Publicize library g) Apply for web digitization grant 	<p>Martha/Libr Comm</p> <p>Guy/Phil/Tom</p> <p>Library/Dev Comm</p> <p>Library Comm</p> <p>Library Comm</p> <p>Library Comm</p> <p>Library Comm</p>	<p>Q1 09 (IP)</p> <p>Q1 09 (IP)</p> <p>2010</p> <p>2010</p> <p>2010</p> <p>2010</p> <p>2011</p>
3. Develop and enhance relationships with schools to increase numbers of tours and provide additional educational opportunities for students.	<ul style="list-style-type: none"> a) Continue regular visits to all Milton area schools b) Conduct orientation program for teachers so they know what we have to offer, as needed c) Promote minority school tours by: <ul style="list-style-type: none"> a. Sending info specifically to Af/Am kids, emphasizing UGRR b. Develop teacher orientation specifically for minority schools d) Create Junior History Club e) Consider tying in museum visit in with Middle School history curriculum 	<p>Cori/Ed Comm</p> <p>Cori/Ed Comm</p> <p>Education Comm</p> <p>Education Comm</p> <p>Education Comm</p>	<p>On-going</p> <p>On-going</p> <p>Q3 09</p> <p>2010</p> <p>2010</p>
<u>Collections Management:</u>			
1. Develop more concise and specific collections/accessions policy to increase appropriate and desired collections and decrease inappropriate or excess collections.	<ul style="list-style-type: none"> a) Revise/approve policy to include: <ul style="list-style-type: none"> a. Specific instructions for accepting donations (be selective, describe what NOT to take – things we already have, date items, etc.) b. How to de-accession items and what to do with excess (sell, find another org to donate to, trade w/another historical society, etc.) 	<p>Collections Comm</p>	<p>Q2 09</p>

	<ul style="list-style-type: none"> b) Solicit donations for needed items – create list of potential donors and contact c) Educate staff/volunteers on preservation/displays via in-house seminar (WHS presenter) – include proper handling procedures and library guidelines 	<p>Collections Comm</p> <p>Collections Comm</p>	<p>Q4 09</p> <p>2010</p>
2. Ensure security and organization of collections by improving facility and storage space.	<ul style="list-style-type: none"> a) Add motion detection lights in collection areas b) Increase lighting in storage areas c) Improve pest control – review areas that may need additional service/increase # of applications? d) Review current collections in storage to reduce excess (sell, trade, or donate according to policy) e) Organize archives – obtain materials to store and preserve collections (connection with archive libraries?) f) Add area for newspaper archives – coordinate with The Courier g) Apply for National Humanities review/grant 	<p>Coll/B&G Comm</p> <p>Coll/B&G Comm</p> <p>Coll/B&G Comm</p> <p>Collections Comm</p> <p>Collections Comm</p> <p>Collections Comm</p> <p>Cori/Martha</p>	<p>Q1 09</p> <p>Q1 09</p> <p>Q1 09</p> <p>Q4 09</p> <p>2010</p> <p>2010</p> <p>2010</p>
3. Increase knowledge of researching current collections for staff and general public to make researching our collections easier and more efficient.	<ul style="list-style-type: none"> a) Develop guide for where to find resources – real estate, birth, death, marriage, obits, etc. b) Conduct training for staff/Board c) Develop research brochure/guidelines for general public 	<p>Collections Comm</p> <p>Collections Comm</p> <p>Collections Comm</p>	<p>2011</p> <p>2011</p> <p>2011</p>
<u>Buildings & Grounds Preservation:</u>			
1. Complete outstanding B&G projects to make facility fully functional and efficient.	<ul style="list-style-type: none"> a) Prioritize/get costs/complete these projects: <ul style="list-style-type: none"> a. Get leak in dishwasher fixed b. Finish reception desk top (Tony) c. Put lock on main floor door to museum d. Security for basement from elevator e. Insulate windows f. Grass planting: <ul style="list-style-type: none"> i. Ask Ace to donate seed ii. Get volunteers to lay seed 	<p>B&G Comm</p> <p>Cori</p> <p>B&G Comm</p> <p>B&G Comm</p> <p>B&G Comm</p> <p>B&G Comm/Rod</p>	<p>Q1 09</p> <p>Q1 09</p> <p>Q1 09</p> <p>Q1 09</p> <p>Q1 09</p> <p>Q2 09</p>

	<ul style="list-style-type: none"> g. Add handrail on entrance walk h. Tile upstairs bathroom i. Stable: <ul style="list-style-type: none"> i. Roof – repair shingles ii. new front doors iii. electricity j. Parking lot <p>b) Find volunteer to mow and trim lawn (Harvey Fry?)</p>	<p>B&G Comm B&G Comm/Cori</p> <p>B&G Comm B&G Comm B&G Comm B&G Comm B&G Comm</p>	<p>Q2 09 Q3 09</p> <p>Q3 09 Q4 09 2010 2011 Q2 09</p>
2. Complete cabin restoration.	<ul style="list-style-type: none"> a) Put together plan/estimate b) Get contractor c) Complete work 	<p>Cori/B&G Comm Cori/B&G Comm Cori/B&G Comm</p>	<p>Q1 09 Q2 09 Q3 09</p>
3. Improve exterior and remote signage to increase visibility and image.	<ul style="list-style-type: none"> a) Determine/install new signs needed for: <ul style="list-style-type: none"> a. Outside building b. Inside building (UGRR, etc.) c. Directional (this way to...) – City/Tourism paying for in 2008-2009? d. Hwy 26/59, I90 – Madison/Milwaukee (investigate costs – state hwy signs require yearly fee; research availability of interstate signs) b) Hire vendor to produce signs (or do ourselves) c) Put up completed signs 	<p>Cori/Sue/B&G Comm B&G/Marketng Comm B&G Comm/Rod</p> <p>B&G Comm/Rod</p> <p>B&G Comm B&G Comm</p>	<p>Q1 09 Q2 09</p> <p>Q2 09 Q4 08</p> <p>Q3 09 Q4 09</p>
4. Develop system to address buildings & grounds concerns and people to contact to improve process for getting maintenance work done and improvements completed efficiently and in a cost-effective manner and to catch problems early to reduce costs and prevent further deterioration.	<ul style="list-style-type: none"> a) Create form for documenting problems b) Formalize/expand B&G committee – assign one member to be contact person/review problems; recruit new members (Robert Shumway?) c) Develop annual inspection process/schedule for all buildings d) Add additional clean-up events, gardening club, etc. to get volunteers more involved in maintenance 	<p>Cori/Sue/B&G Comm Guy</p> <p>B&G Comm B&G Comm</p>	<p>Q2 09 Q2 09</p> <p>Q3 09 2010</p>

5. Evaluate all exterior buildings for use and stability	<ul style="list-style-type: none"> a) Warehouse – move/consolidate contents and dispose of excess; determine best use for building in future b) Review all other exterior buildings/make recommendation to Board c) Develop long-term plan for restoration/use of Goodrich House 	<p>Cori/Joan/B&G Comm</p> <p>B&G Comm</p> <p>B&G Comm/Board</p>	<p>Q2 09</p> <p>2010</p> <p>2011</p>
<u>Marketing/Development:</u>			
1. Develop and promote our public image to: ensure patrons, potential patrons, MHS members, and the community understand our mission and our educational offerings; expand the awareness of our educational offerings and activities; and increase our MHS membership base.	<ul style="list-style-type: none"> a) Create public relations and marketing plan by: <ul style="list-style-type: none"> a. Developing an identity than can be branded b. Investigating and developing co-op advertising opportunities c. Analyzing current and developing additional promotion ideas: <ul style="list-style-type: none"> i. Update our contacts with major PR outlets (Div of Tourism, WI Trails, other media, phonebooks, etc.) ii. Research/attract additional bus tours (Motor Coach?) iii. Review/expand media promotions iv. Review/update web site – increase exposure with links, maximize “finds” v. Create/advertise special focus tours to attract repeat visitors (red hat groups, quilt tours, senior centers, etc.) d. Reviewing and expanding newsletters, publications, and communications to MHS members and general public b) Work with city of Milton and other civic organizations to enhance relationships by: <ul style="list-style-type: none"> a. Serving on Tourism Committee – improve their involvement with and promotion of Milton House b. Serving on Preservation Committee c. Being involved with Todd’s Community Leaders group d. Finding other opportunities to work with City Council by inviting them to hold 1 or 2 meetings per year in Tomah Room and hosting pre-meeting tours as requested e. Searching out opportunities to work with TGP, Main Hall Preservation, Milton Public Library, etc. on historical projects 	<p>Marketing Comm</p> <p>Cori</p> <p>Rod/Cori</p> <p>Cori</p> <p>Cori</p> <p>Marketing Comm</p>	<p>Q2 09</p> <p>On-going</p> <p>On-going</p> <p>On-going</p> <p>On-going</p> <p>On-going</p>

