

# *Bordentown Historical Society*



**2018 - 2021 Strategic Plan**

## **BHS Officers and Trustees**

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### **Plan Facilitated by**

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With special thanks to: Bordentown City; Burlington County Library System, Bordentown; Carslake Community Center; the Downtown Bordentown Association; Residents of the Claire Estate; the Trustees, Officers and Members of the Bordentown Historical Society.

This plan is dedicated to the Skelly family: Patricia, Michael Sr, Michael Jr & Kathryn. Thank you for your commitment and strength.



## Mission

Our mission is to preserve, teach and inspire curiosity about Bordentown's rich history.

## Vision

Our vision is to develop a first-class center for historical and cultural attractions in Bordentown.

## Values

Collaboration - We believe greater outcomes can be achieved working in respectful partnerships with each other than can be achieved working alone. We value opportunities to align ourselves with like-minded organizations to reach a greater outcome for all.

Engagement - We will succeed in our mission with the active involvement of our community and friends. The experience is what one makes of it, and proportional to the effort that goes into it. If one person is having fun, there's a good chance, everyone else is too.

Enrichment - We embrace fulfillment through personal growth in its many forms. We are a channel to learning and creativity first.

Inclusiveness - Bordentown's history is woven into a rich and varied tapestry. Greatness can arise from almost anywhere. We treat each other with dignity. We respect that the diverse and nuanced ideas, backgrounds and perspectives of anyone can have the potential to achieve great results.

Integrity - If we do the best we can and act truthfully, with transparency, we will represent our responsibility to the community as a credible source.

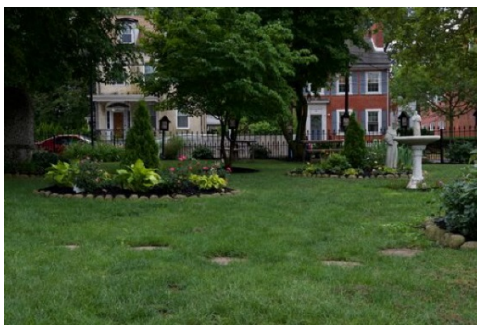
Stewardship - We care about the future as much as we value the past. We seek to understand history's lessons and share that knowledge for all its intrigue and power to inspire the next generations.

# Introduction

The Bordentown Historical Society (“BHS” or “the Society”) is an all-volunteer organization that continues to provide access to Bordentown’s rich past with exhibits, lectures, tours, interpretive museum space and important preservation activities; a role that it took on in 1930 and continues today, over 80 years later. The Society’s activities are made possible through individual contributions, grants and earned income. The largest sources of income for the Society are annual membership fees and programs such as our Home and Garden Tours and investments. Since 1930 our organization has striven to preserve bits of local and state history. We have been the repository for documents, photographs, antiques and quantities of local materials related to our history. We have continued to collect, expand and refine our collection through the years.



In November 2017, the Society, for the first time, determined to assemble a strategic plan; the outcome of which sets a modern foundation on which the organization can continue to grow on a gradual, organized and decisive path forward. To align the resources necessary, BHS leadership and representative members formed a strategic planning committee (“the



Committee”) with functional and institutional knowledge. Volunteers of the Society were empowered by the Officers, Trustees and Committee to facilitate the process. The initial meeting of the Committee occurred in February 2018. Discussions took place in the months following with representation from the Committee, the Society membership and local community.

In the initial planning session, the Committee addressed the mission statement, along with updates on the values and vision, to affirm the consequence of why BHS exists. The Committee conducted a detailed SWOT (strengths, weaknesses, opportunities, threats) analysis to aid in establishing the categorical framework to organize our primary strategic objectives for the next three years, through 2021.

In April 2018, the Society conducted an all-member discussion, including non-members of the public to capture a varied perspective. The exercise revealed a broad range of ideas and important considerations which the organization may be well positioned to address. Additional research continued in the weeks following. The culmination of which generated the initial objectives and goals for the consideration of the Committee. Throughout Q2 2018, the Strategic Planning Committee met with the Facilitators on several occasions to refine and clearly define the objectives and goals that form the strategic plan. With recommendation by the Strategic Planning Committee, the strategic plan was presented for approval by the Officers and Trustees on August 14<sup>th</sup>, 2018.



## Recommendations




Installing a strategic plan for the first time is a major milestone in the growth of any organization, but only the beginning. Referencing the plan on a regular and frequent basis, particularly, in the early stages of implementation, is critical and will lead to a higher probability of success. Meaningful achievements can be made undertaking the measures, herein. Many of the objectives and goals are staged with particular reference to each other – an order of operations. However, with a wide-open field of opportunity, there are any number of starting points. Upon formation of committees or, work groups, specific tactical initiatives will be determined, which are not addressed by this overall strategy document. While assembling this strategic plan, hundreds of great ideas were recorded from multiple sources. The future of BHS is critically reliant on expanding an active and dedicated membership base. To continue managing the active ambitions of a diverse stakeholder group (e.g. members, community, government) the strategic planning process should be ongoing. Preparation of the next plan document should begin in Q4 2020 to implement in Q3 2021.



## I. Administration

- A. Establish goal-oriented functional committees to maximize resources and create efficiencies at BHS.
  - 1. Form committees to drive initiatives and actions (e.g. marketing, membership, donations, collection management, events and education), ASAP.
  - 2. Committee representatives to report on activities and initiatives at the monthly meetings to foster transparency, efficiency and engagement.
  - 3. Memorialize committee initiatives approved by BHS officers and trustees annually to monitor progress. Collaboration between committees is encouraged to cross-pollinate ideas and interests.
  
- B. Develop a shared file system with secured contents viewable to members to allow even distribution of workload by board and committees and enhance transparency.
  - 1. Set up an online storage repository for all documentation (other than collections, to be stored in distinct location) with sufficient protections as directed by the Secretary under the authority of the Officers and Trustees.
  - 2. Record standard operating procedures (“SOP”) for ongoing or frequently repeated tasks to ensure consistency and efficiency. SOPs to be compiled in a directory by BHS Secretary on a regular basis.
  - 3. Build a secure database with name, phone, email, address, interests & expertise, committee participation, dues paid date of members and referral source for prospective members, at minimum.
  - 4. BHS secretary to create, store and distribute monthly meeting minutes and agenda to inform members of all recent and upcoming activities.
  - 5. Establish monthly or quarterly newsletter to inform members and prospective members of recent activity and upcoming events at BHS.
  - 6. Create an online calendar and action list available to all BHS members.
  - 7. Create a shareable list of significant historical research references.
  
- C. Create and manage policies and procedures to support and sustain the ongoing engagement of BHS members.

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1. Schedule bi-annual trainings with experts on rotating topics determined by BHS officers and trustees, strengthening governance and operations.
  2. Provide value-added benefit to BHS members to be determined following study undertaken by membership (or similar) committee.
  3. Develop volunteer orientation to provide exposure to functional roles within the museum and strengthen expertise of members within each role, to be coordinated by the education (or similar) committee.

D. Maintain strong financial controls.


1. Treasurer to maintain accurate, timely and readily accessible financial records and report to BHS trustees, officers and members.
2. Build and maintain 1-year budget and 2 & 3-year financial projections.
3. Install Deputy Comptroller with non-profit experience to support the Treasurer on reporting and planning, address succession and establish additional ongoing oversight.
4. Conduct an independent audit, as defined by the Financial Accounting Standards Board, at least once every five years.

## II. Events & Education

A. Engage a wide range of the population through specialized exhibits.

1. Create children's programming events to include any of exhibits, storytelling and shows produced by the education (or similar) committee.
2. Leverage technology to create interactive multimedia exhibits featuring audio stories, videos and tactile/hands-on activities.
3. Present oral histories conducted live and pre-recorded by the collections committee (or similar).
4. Host rotating exhibits on a quarterly basis, at minimum, to feature a unique aspect of Bordentown history.


B. Highlight historical elements of Bordentown in partnership with the local community.

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1. Organize tours/exhibits at historic places in conjunction with third party hosts occupying/owning historically relevant locations.
  2. Partner with local schools/institutions as a fostering channel to BHS's knowledge of area history.
  3. Host "open office hours" to assist/collaborate with interested individuals to research aspects of Bordentown history.
  4. Draw attention to Bordentown with special function events and celebrations, including, on-site exhibits, performances and outdoor activities (e.g. donor gala, festival, history week, reenactment).
  5. Utilize BHS properties to host historical and non-historically related functions (e.g. weddings, conferences).

### **III. Outreach & Development**


- A.** Establish and foster long-term relationships with donors, partners, prospective members and sponsors - generate a 10% net annual increase in aggregate BHS funds over the next 3 years encompassed by this strategic plan.
  1. Expand annual membership drive to hone growing donor relationships.
  2. Establish a legacy and memorial donor program.
  3. Annually assess and pursue public and private grant funding.
  4. Seek to broaden/deepen relationships with local businesses and city to cross-promote and expand available benefits.
  5. Leverage social media to market Bordentown Historical Society events.
  6. Develop and host a series of historically themed tours offered on a regular or periodic basis (e.g. seasonally, monthly, weekly, daily, etc.).
- B.** Generate awareness and interest in BHS to promote long-term growth of the organization - a 10% annual member growth rate.
  1. Represent a BHS presence at more than 3 non-BHS-specific community events (e.g. Bordentown Street Fair, Cranberry Festival, New Jersey State History Fair, Burlington County Fair).



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2. Leverage talent and expertise of the marketing (or similar) committee to ensure BHS branding represents the breadth and significance of Bordentown's history, our mission, vision and values.
  3. Cement relationships with other national, state and regional historical societies/associations.

#### **IV. Infrastructure**

- A. Update and maintain the physical and digital infrastructure at BHS to enhance accessibility and functionality.
  1. Establish a central BHS office to coordinate operations for all BHS managed sites, with specific standard operating procedures at each to maintain consistency, quality and maximize resources.
  2. Update BHS digital infrastructure as permitted by BHS budget to include: website, with accommodation for expanding and shareable archive; office computer; Wi-Fi for volunteer and public access; phone answering system.
  3. Update facilities and programs in keeping with handicap accessibility codes and broad audience needs (e.g. large print exhibit plaques, audio readers) as permitted by BHS 3-year budget.
  4. Assemble committee to explore environmental control, security and fire protection systems to meet collections preservation needs, ASAP.
- B. Improve digital and physical infrastructure to better the BHS visitor experience before, during and after museum visit.
  1. BHS marketing (or similar) committee to expand and maintain digital presence (e.g. Instagram, online ticketing, TripAdvisor). Success signals to be established annually, relative to the use/purpose of the tool.
  2. Create transportation and parking options with local partners, to be clearly conveyed to prospective visitors. Examples include: parking at hotels providing shuttles in town; use of business parking lots at off-peak hours.
  3. Dedicate a portion of BHS annual income to enhance equipment and facilities with consideration to trends in technology and visitor experience. Amount to be approved annually by BHS trustees and officers.
  4. Working in conjunction with the archiving committee (or similar), allocate more space for exhibition and visitor use, including, but not limited to meeting space, public congregation area, events and seating, generally.

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5. Dedicate space in the museum to improve visitor experience and generate revenue (e.g. sell souvenirs, logo goods, food and beverages).

## **V. Collections**

- A. Develop and build collections management system to effectively record, monitor and encourage exploration of assets.
  1. Institutionalize cataloguing procedures according to an agreed upon standard, complete with temporal and geographic references, ASAP.
  2. Inventory acquisition, disposition and loaned artifacts and documents in the collection according to the agreed upon standard.
  3. Establish partnerships with interested parties having complementary skill sets to provide enhanced accessibility to specialized records (such as, genealogy) online, including free and fee generating resources.
  4. Recruit specialized experts to establish a practice gathering oral histories as a component of collections and interns to continue the practice, along with a role of ongoing cataloguing support.
- B. Actively curate collections to efficiently utilize space, protect assets and showcase the maximum breadth of Bordentown history.
  1. Following thorough assessment, engage in disposal planning that includes identification and disposal of items not relevant to Bordentown history to maximize space and generate revenue.
  2. Develop guidelines and procedures to encourage donations or loans relevant to Bordentown including pictures, letters, diaries or artifacts for digitization, cataloguing and exhibition.
  3. Conduct asset appraisal no later than 2019 in conjunction with disposal planning and asset cataloguing.
  4. Purchase supplies to sufficiently protect documents and artifacts on an ongoing basis.