

**VISION 2020
STRATEGIC PLAN**
For
CLOVERDALE HISTORICAL SOCIETY

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Cloverdale Historic Society Strategic Plan

2010 -2020

Introduction

The Cloverdale Historical Society is a voluntary organization established to preserve local history and share the heritage of this region with the community in a way that is relevant and enriching. Although the Society focus is primarily on the past, the group's major accomplishments are the result of planning for the future. Such conscientious attention to emerging trends and new possibilities has earned the Society a key role in the daily life of the Cloverdale community.

The 2020 Strategic Plan builds on this strength with a vision for how the Society will continue to fulfill its mission over the next 10 years. The Plan defines the Society's response to new opportunities and challenges presented by the recent completion of the History Center Building, by the City of Cloverdale's plan for a cultural and educational anchor to the downtown area, and by the changing demographics of this region.

These strategic issues have a direct and immediate impact on all aspects of the Society's operations. In response the Society has reexamined its mission and guiding principles, crafted a vision for the future and developed a set of long range goals and objectives designed to accomplish the vision for 2020.

This plan was formally adopted by the Board of Directors of the Society on October 26, 2010.

Mission

The Society is dedicated to collecting and conserving materials and information that represent Cloverdale area history, including the preservation, interpretation, and celebration of local history for public education and enjoyment.

Guiding Principles

Six principles are of highest value to the Society. They are listed here not in any priority order and are always to be considered in balance whenever organizational decisions are made.

Preservation

We value the culture and history of Cloverdale and its surrounding area.

Application: We strive to obtain and conserve historic materials representative of individuals, families, civic and social life, business and industry, community events and organizations from Cloverdale area history. We encourage preservation of the City's physical history (buildings, structures, objects, sites and districts).

We value the Society's property in downtown Cloverdale, which includes the History Center, the Gould -Shaw House and Garden and their contents.

Application: We make every effort to preserve the buildings and garden, careful not to alter the property in ways that diminish its character or historical significance except for reasons of safety and security.

Public Purpose

We value sharing our historic resources with the local community, visitors and the general public.

Application: Mindful of our public purposes and responsibility to preserve historical resources, we endeavor to attract visitors and guests through outreach efforts, so that more people can enjoy and learn from the Society's programs and activities.

Volunteer Service

We value Volunteers' talents and time and recognize them as the organization's major human resource. We strive to provide a variety of satisfying service opportunities.

Application: We recruit, train and support volunteers as essential colleagues. We work to ensure that our volunteer pool remains viable, strong and sufficient to our needs.

Fiscal Responsibility

We value financial self-sufficiency achieved through grants, fees, donations, memberships, endowment earnings, and various fund raising efforts.

Application: We diligently monitor the Society's financial health, utilizing accurate financial statements, and we affirm our longstanding commitment to protect and grow the endowment.

Diversity

We value diversity in our members, volunteers, and visitors, so as to more accurately reflect the demographics of communities we serve.

Application: We actively work to create an organizational culture inclusive and responsive to changing demographics of the geographic area we serve.

Excellence and Integrity

We value high standards, integrity, competency and accountability as set forth in the American Association of Museums document, "Characteristics of an Accreditable Museum."

Application: The Society embraces the value of conducting the self assessment program for small organizations offered by the American Association for State and Local History.

Vision

By 2020 the Historical Society will continue to:

- Collect and conserve historically significant examples of Cloverdale's past as well as history-making current events.
- Offer public programs that draw people to downtown Cloverdale for learning, volunteer service and events, including social opportunities, that foster a strong community.
- Use Society facilities as a community resource.
- Grow our revenues sufficient to meet expenses and support future fiscal and capital needs.
- Work in partnership with Cloverdale area nonprofit organizations.
- Support the City of Cloverdale's vision of a downtown center anchored by cultural and educational resources.
- Increase membership and supporters of the Society and cultivate a high level of commitment to the Society among Members.
- Evaluate events and programs for lessons learned and apply these lessons to future programs.

The Society will undertake new efforts to:

- Achieve a manageable growth in the number of visitors.
- Improve the quality of visitor services.
- Develop, operate, and maintain a comprehensive user-friendly website.
- Work in partnership with local schools, regional colleges and universities to serve students of all ages.
- Foster a habit of cultural investigation and exploration through programs, exhibits, visiting lecturers, opportunities for discussion, interactive experiences, and reference material related to local and California history.
- Serve as a source of information in support of the preservation of physical structures important to Cloverdale's past and preservation policies included in the City's "General Plan".

Goals and Objectives to Accomplish Vision 2020

The Society advances its mission through:

- Effective leadership and governance
- Collection and maintenance of historically significant materials and assistance to the City in achieving Cloverdale's preservation goals.
- Public education
- Development of volunteers and financial resources.
- Use and care of the Society's property and facilities.

For each of these areas, a set of long range goals with specific objectives are presented which address the strategic challenges facing the Society. Progress in accomplishing this 10 year plan will be evaluated by the Board on a yearly basis with a thorough review at the end of five years (2015). A new planning effort will begin in time to produce the next ten year plan by 2020.

I. Leadership and Governance

The Board of Directors of the Society will:

A. *Ensure that decision making is efficient and inclusive:* Decision-making in the Society has primarily been centralized at the Board level, an efficient practice that developed strong support and loyalty among Board members. However, new opportunities and challenges presented by emerging trends in the community and completion of the History Center have increased the volume of decisions that must be made in a timely manner.

1. Establish seven Committees (Finance, Collections, Program, Exhibits, Library, Development, and Facilities) to provide leadership and coordinate the work in these areas. Fill membership positions, allocate a budget and provide a written charge which includes implementing the objectives in this Plan so that all committees are operative by 2012.
2. Place at least one Board member on each Committee to assure effective communication between the board and the committee. (This volunteer may be the chair, but that is not mandatory). Provide a clear definition of the responsibilities of this Liaison person in Board orientation and training materials. Complete by 2012.
3. Develop an orientation and training program and written materials for new Board members and Committee Chairs by 2012, including roles and responsibilities.
4. Update the bylaws, policies and procedures of the Society and develop new written policies as required before the end of 2011. (Note: as decision making

becomes decentralized the need for well understood policies becomes essential.)

B. Expand Board membership to reflect the changing demographics of the broader Cloverdale community.

1. Set a Board meeting time that best accommodates those with full time jobs as well as members who are retired. Establish the new routine by 2012.
2. Recruit and appoint volunteers to the Committees with specific attention to achieving a broad and diverse representation from the community. Achieve a 30% increase in diversity among committee volunteers by 2014. Seek Board members from committee membership (Ongoing).
3. Actively recruit board and committee volunteers from other nonprofit and community service associations in the greater Cloverdale area. A concerted effort will be launched in 2011.
4. Target under represented groups for recruitment of Committee volunteers with a specific recruitment strategy in operation by 2012.

C. Ensure that the Society's staffing plan meets the challenge of increased opportunities and greater responsibilities.

1. Update the staffing plan by 2012 with the objective of relieving the Executive Director of responsibility for collection management. In addition to better management of the collection this is expected to enable the Executive Director to devote more time to development.
2. Seek federal, state and local monies to fund, or partially subsidize the creation of new staff positions by 2012.
3. Explore opportunities for funding an internship for college students interested in history and/or museum operations and management by 2013.

D. Ensure that the Society is operating according to the highest standards and serving the community in the most effective manner.

1. Direct the Executive Director to organize and begin conducting the American Association of Museum's self assessment program by 2013 with the goal of completing the assessment by 2015.

2. Update and revise the strategic plan on an annual basis with a major review at the end of five years.

E. Ensure that the Society funds are well managed.

The board relies on the Finance committee to manage the Society's financial resources. The finance committee is a committee of the board and includes the treasurer. The committee is responsible for setting the annual budget, monitoring and managing the endowment fund and providing the board with regular updates on the financial health of the organization.

1. Update the policies and procedures for the budget development process, including the creation of a base budget for each committee by 2012. The expanded committee structure for the society described in this Strategic Plan requires that the Finance committee delegate some responsibility to each committee to develop a proposed annual budget for their specific activities. Each committee will then be expected to live within their allocated funding or receive board approval for any expenditure beyond their budget.

2. Examine the benefits of establishing a new policy that states: "As new monies are raised follow to the extent permitted by the terms of the Endowment, that excess earnings shall be used for operating expenses, to restore the Endowment to a level that reflects the impact of inflation on the real value of the of the Endowment, and to fund future capital improvements and acquisitions". By 2011.

3. Prepare financially to take advantage of unforeseen opportunities for acquisition and improvements including the acquisition of additional facilities as program needs dictate. By 2012.

F. Prevent the loss of valuable knowledge of the organization.

Establish a defined policy to capture the "collective memory/history" held by current Society volunteers.

1. Develop and test a mentoring program by 2012 that would allow experienced volunteers to pass information on to new volunteers in addition to formal training.

II. Collection Management

The Collection Management Committee develops written policies and procedures and coordinates the work of accession, preservation, storage, retrieval, and de-accession. Recruit chair and membership by 2012. (See section I) This committee will:

A. Ensure that all items in the collection and each new item under consideration meet the Society's criteria for accession.

1. Establish an "Acquisition Team" to determine which items shall be accepted or declined for the collection based on established written criteria. The Team will evaluate the entire collection on a regular schedule to identify items that should be removed, stored or returned.
2. Expand the "Team" as needed to manage the accession workload and prevent backlogs.
3. Review the criteria currently used for evaluating items for inclusion in the collection and revise as necessary. Include revised criteria in the Society's Policy and Procedure manual as well as training materials for the Board and Acquisition Team by 2012.
4. Provide the Board with a summary list of those items accessed and de-accessed on a quarterly basis.

B. Ensure that all materials in the collection can be retrieved in an efficient, timely manner.

1. Ensure that all new accessions as well as those currently in the collection are entered into the Past Perfect data base by 2012.
2. Establish a standard that all information on each new acquisition will be entered into the database within *two to three weeks*. Achieve this standard by 2013, or as soon as the number of volunteers in the "Acquisition Team" reaches four.
3. Identify and formally accession all items currently in the collection but not as yet accessioned. Complete by 2014.
4. Implement a numerical storage system based on accession numbers for photographs, ephemera, and small artifacts by 2012.
5. Inventory all artifacts not stored numerically, including audio-visual items and update the computer catalog by 2013.

6. Improve the usefulness of the Past Perfect database for research, exhibit development and public education by including additional keywords and search terms in the index. Complete by 2013.

7. Develop a computerized index of the entire collection (including library resources and topics covered in the subject files) to assist visitors searching for items in the collection and/or specific topic information. Complete by 2015.

C. Prevent degradation, improve longevity and protect against theft or destruction of items in the collection

1. Follow “Best Practices in Preservation” established by the American Association of Museums for preservation of artifacts, material and audio-visual. Include these “Best Practices” in the Policy and Procedure manual.

2. Remove original photographs and ephemera from binders for appropriate archival storage by 2015, with priority going to oldest and most vulnerable items for immediate attention.

3. Work with the Facilities Committee on identifying security needs by 2012.

4. Establish a storage plan for best use of all storage areas by 2012.

5. Scan all images for electronic storage by 2014.

D. Grow the collection to better represent diversity in local history

1. Sponsor events in cooperation with the Program Committee that reach selected audiences and encourage the donation of artifacts.

2. Review the collection every five years to assess priority areas for improvement.

3. Assess the resources needed for conducting oral interviews with selected individuals who have played a significant role in local history by 2012.

4. Consider developing a new program that periodically invites Cloverdale residents to submit family photographs that show ordinary people from the past at work or at play. Finalize decision by 2014.

III. Education

The work in this area is divided among three Committees; Program, Exhibits and Library.

A. Program

The Program Committee is responsible for creating and conducting educational programs that bring local history “alive”, making it relevant and creating a high level of interaction between the Society and the Cloverdale community. This committee will;

1. Evaluate current programs to determine if programming is achieving desired results and make recommendations for improvement. Complete the evaluation with recommendations by 2012.
2. Identify audiences typically underrepresented in Society events and design programs to answer the specific interests of those audiences, beginning in 2013. Removed the specific reference to migrant worker exhibit
3. Meet at least quarterly with representatives from the Center for the Performing Arts, Arts Alliance and other local groups and organizations with similar or overlapping interests to explore partnership opportunities for creating programs with appeal to new audiences. Work with these organizations to bring about the first meeting in 2011
4. Develop programs on varied topics that advance the mission of the Society. Coordinate the topics with the “Changing Exhibit’s” topics when feasible.
5. Establish partnerships with local schools to produce a variety of programs in local history designed to complement curriculum (i.e., the fourth grade California History Program). Emphasize programs that introduce and involve students with History Center resources. Put in place by 2012.
6. Develop a program with youth groups such as the Boys and Girls Club for regular field trips to the History Center. Conduct the first of these by 2011.

B. Exhibits

The Exhibits Committee is responsible for presenting items in the Collection or on loan to the Society in an interesting, appealing and educational manner. This Committee will:

1. Develop an overall plan for using exhibit space throughout the History Center that designates space for both permanent and temporary/rotating exhibits by 2011.
2. Create at least one permanent exhibit and two temporary exhibits per year for the History Center. Complete ten permanent exhibits by 2020.
3. Explore the potential for using a traveling exhibit to reach groups that are not frequent users of the History Center. Complete exploration by 2014.
4. Create written policies and binding contracts for loaning and borrowing artifacts and/or exhibits. Put these policies in place by 2012.
5. Improve the Gould Shaw House's representation of life in its era, including interior design and antique furnishings. Select one room each year for improvement beginning in 2011.
6. Develop a permanent exhibit for the Community Room designed to be put up between temporary exhibits to fully take advantage of this heavily used public room and keep it a pleasant room for events. This exhibit is to be of high quality, easy to put up and take down. To be completed by 2013.

C. Library

The Library Committee is responsible for oversight of all library materials and responding to requests for assistance with research projects. This Committee will:

1. Develop a storage and organization plan for all library materials, consistent with the Collection Management Policy by 2012.
2. Index and inventory all research material in the library, including contents of browsing binders and the alphabetical subject files. Enter this information in a computer program such as Microsoft Access and develop a procedure for updating this index. Accomplish this by 2012.
3. Increase and improve public access to items in the library by; establishing written policies and procedures that both protect the collection while encouraging access, making it easier to use the material (i.e. the creation of a media station and online link to the Society's website that posts a catalog of available reference material) and setting user fees as needed to offset costs of providing the service. Complete by 2015.
4. Recruit a volunteer(s) interested in serving as "Research Librarian", to assist people with research, to manage the reference section of the library and to catalog new titles as acquired. Fill this volunteer position by 2012.

5. Recruit a volunteer to serve as “Historian” who will collect ephemera and document Society events as well as Cloverdale-related items that will be of future historical value. Fill this position by 2012.

IV. Development

Establish a committee for Development to coordinate and carry out Society activities in communication, marketing and fundraising. This committee will:

A. Expand the number of visitors and visits to the History Center and Gould-Shaw House and increase participation in Society events.

1. Develop an overall communications/marketing plan by 2012 that includes the consideration of a “communications intern” and other staffing and annual budget requirements.

2. Continue to develop the web-site and other internet social networking tools for reaching new audiences, improving communication with both members and the general public and making reference material more accessible to the public. (For example: participate in the City of Cloverdale’s Web Portal)

3. Ensure that all public communication is coordinated to achieve a consistent and well crafted message. Consider greater use of email for broader distribution of announcements and material like the newsletter. Example: explore new opportunities for membership data management with available services such as, “Vertical Response.com”. Complete exploration by 2013.

4. Improve the membership contact list so that files are brought up to date and are regularly updated. Complete by 2012 and then ongoing.

5. Prepare a written annual report directed to the membership, major donors, all volunteers and community leaders by 2012.

B. Enlarge the demographic range and diversity of members and volunteers by 2015.

1. Continue to build affiliations for recruiting new members and new volunteers.

2. Develop special materials and communication tools targeted at specific audiences by 2013.

3. Encourage visitors and members of other museums in the region to participate in the Society's programs and services with targeted outreach by 2013.

4. Establish a youth membership category that offers incentives to attract K-12 students by 2012.

C. Target communication and marketing efforts to help in the recruitment of volunteers.

1. Fully utilize available resources, such as the annual meeting/potluck dinner summer picnic, newsletter, email, etc. to advertise open volunteer and Committee positions. Evaluate by 2013.

2. Hold special events designed primarily to recruit volunteers for Committees and other open positions (docents, garden etc.). Consider beginning with a "volunteer" fair/open house reception. Hold at least one such event in 2010 and evaluate the opportunities and results for future planning.

D. Develop activities that raise revenue sufficient to cover operating expenses and increase the Endowment over the next 10 years at an average rate of 10% per year.

1. Test new programs that have the potential to raise revenue such as; a lecture featuring a recognized speaker on a history topic, a spring tea, and a "History Lives" recognition dinner for a well known local person etc. Try one new idea by 2011.

2. Improve revenue from sales of historical and educational items, by expanding the number and type of products in the gift shop by 2011.

3. Increase visitor donations and general donations within the rules that govern the Society's tax exempt status. Develop a fee structure that is both consistent with the Society's values and consistent with other museums and Historical Societies. Complete by 2014.

3. Develop the capacity to seek and obtain grants by 2014.

4. Explore the potential for securing city support for certain ongoing operating and capital expenses. Develop strategy by 2012.

5. Develop a planned giving strategy that puts the Society in a strong position with estate planners and financial advisors by 2013.

V. Facilities

Create a facilities committee to maintain the Society's campus in top condition, to consider safety issues and ensure that safety measures are followed and ensure that space is adequate for programs and events. The committee will:

1. Develop a written building and garden maintenance and improvement plan with a designated budget by 2012. Review and set priorities for expenditures annually.
2. Conduct an annual safety check to ensure hazards are identified and accidents prevented. Update the Illness and Injury Prevention Plan (IIPP) within the next two years or by 2013.
3. Develop a security Plan for the History Center and Gould-Shaw House, including the need for additional locking doors, to be reviewed and updated on an ongoing basis. Complete security plan by 2012.
4. Upgrade the Gould-Shaw residence with a new roof and exterior paint by 2012 and make other repairs as needed. Assure that all work follows the Secretary of the Interior's Standards for the Treatment of Historic Properties.
5. Complete signage and other work remaining to close the "construction" phase of the History Center in 2011.
6. Regularly assess the utilization of space for best function no less than every three years and develop a long range facility plan that establishes a "priorities of needs" by 2012.
7. As program and services expand seek opportunities to acquire additional facilities.