

Charting a course for the future

Introduction

The appointment of a new President to the New York State Historical Association and The Farmers' Museum in 2005 presented an ideal opportunity for the leadership of these organizations to launch a strategic planning process. With the endorsement and support of the boards of both, guided by D. Stephen Elliott, President and CEO, a management team comprised of Wayne Mellor, Vice President of Marketing and Finance, Paul D'Ambrosio, Vice President and Chief Curator, Garet Livermore, Vice President of Education, Barbara Fischer, Senior Director of Human Resources, Joseph Siracusa, Senior Director of Operations, and Gretchen Sorin, Director of the Cooperstown Graduate Program, began meeting in the latter part of that year to initiate planning. John Caranhan, Vice President of Development, joined the planning team at later stages. The project was facilitated by Marianne Bez and staffed by interns from the Cooperstown Graduate Program, Tobi Voigt and Kate Betz. Administrative assistance was provided by Melanie Bruce.

From its outset, the objectives of the process were to assess the organizations, to elicit input from members, visitors, and various other audiences, to articulate a sense of where the organizations might be in five years and to develop an action plan for the next three years with specific goals, outcomes, assignments of responsibility, and a progress reporting system.

In the initial phase of planning, team members assembled a wide-range of operating information to gain a better understanding of the organizations. Key performance indicators including data related to revenues, attendance, development, membership and institutional reach were analyzed. Past studies and previous planning documents were reviewed. Team members identified high performing museums and historical associations for quantitative comparison. Then they identified a dozen critical areas for performance benchmarking. A literature review was conducted to ascertain trends and concerns relating to the regional economy, cultural tourism, philanthropic support, and the museum field. This research was ongoing throughout the first half of 2006.

Concurrently, the services of three outside agencies were engaged to gather input and insights from other key stakeholders. The Council of Community Services of New York State conducted 14 confidential employee focus group discussions with staff members at all levels of both organizations. On behalf of NYSHA, the Center for Economic and Community Development SUNY College at Oneonta surveyed Association members to capture a snapshot of attitudes and perceptions of benefits, the museums, publications, and programs. OpinionWorks, a public opinion research firm conducted 1,000 telephone interviews with potential and actual visitors to Cooperstown to assess perceptions of the overall destination and the museums within this setting. The firm of Resnicow Schroeder was engaged to develop image, identity, message, positioning and a strategic marketing plan. The Farmers' Museum also elected to participate in the Performance Management Program of the American Association for State and Local History. The program measured visitor satisfaction and opinions through surveys conducted at multiple history

museums during the summer of 2006. Unfortunately, comparative results from the participating institutions were not available until after completion of this strategic plan. Insights from the forthcoming results will be incorporated into adjustments to the plan at year-end.

The information gathered and the results of this research helped guide the development of planning goals and objectives. Presentations at board meetings throughout the year provided the leadership with updates and opportunities for board feedback. During the process, the planning group articulated institutional values and revised and refined the mission statements for both organizations. Vision statements were drafted, reviewed and recast. In July and August, each senior manager articulated strategic directions, preliminary goals, and key objectives for their areas of operations. In September, the President identified the major strategies for the near future. These were compiled and synthesized into a first draft. Senior managers worked with staff members to refine objectives and identify appropriate three-year action steps. Preliminary drafts with goals and objectives were shared with the full NYSHA board and the finance committee of TFM board at their fall meetings. The full plans were reviewed and adopted by the boards of directors at their final meetings of 2006.

With these endorsements, the boards of trustees launched NYSHA and TFM into the most critical phase of planning—implementation. Now words become the actions that will shape these institutions and guide the staff over the next three years.

Over time, there will be progress reports, re-assessment of goals and actions, and adjustments or course corrections when needed. Progress driven by the senior staff is being tracked in individual monthly reviews and quarterly team reviews with the President. NYSHA board oversight will be provided through the trustee committees. The agendas of forthcoming board meetings will be focused on deepening board understanding of strategic issues, informing members of progress and challenges, and making appropriate adjustments.

In writing for the National Endowment for the Arts, management consultant Gregory Kandell characterized a good plan as “a living, breathing document.” These plans are intended to be shared widely and used to organize work teams, and to inform board agendas for the future.