

**The Connecticut Historical Society
Strategic Plan Priority Goals
Approved by the Board of Trustees on October 24, 2007**

Mission

The Connecticut Historical Society inspires and fosters a life-long interest in history through exhibitions, programs and Connecticut related collections because examining and understanding the past, and connecting the past with the present, provides a guide for the future.

Strategic Priority Goal

To create an audience focused culture of collections access, customer cultivation, and organizational discipline

Supporting Goals

1. **Collections Access Goal:** Create a culture of mission impact through collections access and programs, to inspire and promote an interest in history for target audiences*
2. **Customer Cultivation Goal:** Create a culture of customer cultivation to increase customers, individual donors and funders
3. **Organizational Discipline (Financial Management) Goal:** Create a culture of fiscal discipline (resource management and allocation) to assure financial stability/sustainability and to support effective mission delivery
4. **Organizational Discipline (Talent/Technology/Infrastructure) Goal:** Create a culture of organizational discipline (infrastructure, policies/processes and resource allocation) to deliver programs effectively in a sustainable cost-effective way

*Target audiences: 1) school groups and teachers, 2) researchers and learners of all ages (academics, professionals, collectors, media writers and staff, family historians, history buffs, genealogists, members), and 3) heritage visitors seeking an educational and entertaining experience by themselves or with family, friends, or affinity groups.

The Connecticut Historical Society
Strategic Priority Goals and Key Strategies
Strategic Priority Goal:
To create an audience focused culture of
collections access, customer cultivation and organizational discipline

Culture of Collections Access

Culture of Customer Cultivation

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| <p>Mission Delivery</p> <p>Goal 1: To inspire and foster an interest in history for target audiences by:</p> <p>Collections Access and Development</p> <ul style="list-style-type: none"> • Develop technology solution for cataloging • Develop acquisition/management strategy • Give genealogy prominence <p>Exhibit Development</p> <ul style="list-style-type: none"> • Emphasize CT history at 1st point of entry • Develop 5-year Exhibits Plan <p>Educational Programming</p> <ul style="list-style-type: none"> • Maintain students/quality/market share • Expand youth programs <p>Marketing/Positioning</p> <ul style="list-style-type: none"> • Build marketing/evaluation/on-line presence • Develop/implement Marketing Plan • Create and update website quarterly • | <p>Audience Development</p> <p>Goal 2: To increase customers, donors and funders by:</p> <p>Visitor Experience Enhancement</p> <ul style="list-style-type: none"> • Train & evaluate staff as public servants • Make collections available at 1 entry point • Deliver on-site adult tours & programs • Evaluate/apply audience feedback <p>Donor Cultivation</p> <ul style="list-style-type: none"> • Convene Fundraising Task Force/Board Committee • Develop/implement Individual Donor Plan • Develop/implement 3-5 year Fundraising Plan <p>Strategic Partnerships</p> <ul style="list-style-type: none"> • Clarify/plan/implement strategic partnerships (for mission, visibility, and fund/friend raising) • |
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Culture of Organizational Discipline

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| <p>Financial Management</p> <p>Goal 3: To assure financial stability & sustainability by:</p> <p>Budget Management/Sustainability</p> <ul style="list-style-type: none"> • Implement revenue-based budget planning • Tie budget allocation to priorities • Achieve \$0.30 to raise \$1.00 in 3 years <p>Facilities Management</p> <ul style="list-style-type: none"> • Conduct risk assessment & Update Disaster Plan • Consider capital reserve • Develop Long-range (10-year) maintenance and facilities plan <p>Endowment Management</p> <ul style="list-style-type: none"> • Achieve 5% endowment draw (in 5 years) • Review annual investment performance <p>Revenue Generating Projects</p> <ul style="list-style-type: none"> • Explore feasibility | <p>Staff/Technology/Infrastructure</p> <p>Goal 4: To deliver programs with mission impact in cost-effective ways by:</p> <p>Technology/Infrastructure Enhancements</p> <ul style="list-style-type: none"> • Identify/implement technology upgrades • Develop/review all policies & procedures • Evaluate/implement required infrastructure <p>Staff Development</p> <ul style="list-style-type: none"> • Create cross-departmental understanding of our business • Identify staff available for cross-departmental teams • Evaluate organizational structure <p>Board Development</p> <ul style="list-style-type: none"> • Build skill-based, fundraising focused Board • Update/measure progress on strategic plan • Develop Leadership Succession Plan |
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