

**The Troy Historical Society  
Operational Managers of**



**STRATEGIC PLAN 2022-2027**

**June 2022**

## **STRATEGIC PLANNING OVERVIEW**

Nonprofits serve needs within the community that are critical. Demands upon all nonprofit organizations are increasing while resources and funding are decreasing. Creating a thriving and sustainable organization able to compete in the market and maintain and expand market share becomes paramount to the future of the Troy Historical Society.

Strategic planning is a critical element of the success of any nonprofit, providing clear and articulate definitions of whom the organization serves the measures of success, and the means to achieve success. Organizational alignment is the heart of successful strategic planning and the power source behind timely and effective implementation. The strategic plan and process serve as a framework for all key operational and business plans (including budgets) to improve short-term and long-term performance. The Board of Directors and the Executive Director are responsible for ensuring a dynamic and purposeful implementation of the strategic plan.

## **STRATEGIC PLANNING PROCESS for the TROY HISTORICAL SOCIETY**

A strategic planning process began in January 2022 and culminated in a strategic framework for a five-year, 2022-2027 Strategic Plan. This ongoing strategic planning process emphasizes a stakeholder centered approach ensuring the board, leaders, staff, and community actively engage in the ownership of the process, the results, and its integration within the Troy Historical Society and the operation of the Troy Historical Village (THV).

The process included participation to ensure all points of view were represented with widespread commitment to the present and future vision, successes and areas of improvement, and the changing environment it operates in. The process included the identification of risk, data gathering, discussion, and recommendations on short- and long-term issues. The process also addressed challenges including organization's culture, mission, vision, competitive strategies, programmatic issues, relationships with the community, and internal needs to effectively move forward.

## STEPS OF STRATEGIC PLANNING PROCESS

- Communication of strategic planning process to internal and external stakeholders
- **Environmental Scan**
  - **Stakeholder Survey w/ Internal and External Assessment and Gap Analysis**
  - Data Gathering/Review/Analysis
- **Board and Staff Sessions establish strategic framework**
  - **Review Mission, Vision, and Values**
  - **Identification of Strategic Issues and Priorities for 2022 - 2027**
  - **Goals and Objectives**
  - **Strategies – ongoing development of strategies/work plans with performance metrics/ongoing evaluation process identified for board priorities**
  - **Strategies – ongoing development of strategies/work plans with performance metrics/ongoing evaluation process identified by Executive Director and staff**
- **Implementation**
  - Realistic, measurable, and **prioritized strategies and action plans** with responsibilities and timelines will be developed by the Executive Director, the Board of Directors, and staff
  - The **established goals and objective with strategies directing specific activities and assignments will guide THV decision and actions for the next three to five years 2022-2027**
  - **Ongoing review process** of strategic plan with **special emphasis in 2026 to prepare for the next five-year plan.**

**MISSION STATEMENT\***

The Troy Historical Society activates discovery and cultivates life-long exploration of history by sharing and preserving heritage through creative, meaningful experiences that engage the community.

**VISION STATEMENT\***

The Troy Historical Society embraces and supports preservation through education, presentation and access to the artifacts, archives, and resources at the Troy Historic Village. These resources and activities enhance knowledge and historic context and provide opportunities for community development, social interaction, and open dialogue on issues of importance.

**VALUES\***

The Troy Historical Society provides a welcoming environment that:

- Engages visitors in positive learning experiences and social interactions
- Respects the significance of history as we seek knowledge, understanding and relevance in our lives
- Recognizes artifacts as social objects and catalysts for sharing information and ideas
- Embraces innovative and creative interpretive programs
- Encourages civil discussion and objective analysis and evaluation of controversial issues
- Promotes a stewardship and adherence to the highest standards of historic preservation; manages resources with integrity and transparency; and treats all peoples with dignity and respect

\* Recommendation: Review and make appropriate modifications to Mission, Vision, and Values (as discussed in Board/Staff sessions).

**ORGANIZATIONAL OVERVIEW**

The Troy Historical Society (THS) was organized in 1966 as a non-profit, project-driven club focused on the preservation of Troy's pioneer era. THS spearheaded the development of the Troy Historic Village by saving threatened historic buildings in Troy and the region through gift or purchase, and raising funds to relocate and help restore the structures on the land around the City of Troy's 1927 Township Hall. Between 1968 and 2011 the Troy Historic Village grew into a local history museum, which highlighted Troy's past as an example of regional history. Significant THS facility projects include:

1969	Solomon Caswell House acquired by gift and moved to the open area behind the 1927 Township Hall
1978	An on-site workshop was rebuilt and furnished as a Print Shop. The Wagon Shop was moved from Troy Corners to the Village.
1980	Poppleton School was purchased and moved to the Village.
1981	Volunteers Rod and Dave Harris completed the forge for the Wagon Shop. The Log Cabin was moved to the Village from Monroe County.
1987	Troy Union School was donated by Robert Moser, moved to the Village, and re-designated Town Hall.
1989-90	Construction of the General Store was completed.
1997	THS and City of Troy purchased the old Troy Methodist Church and Parsonage and paid utilities and insurance on the buildings for 7 years.
2003-04	The church and parsonage were relocated to the Village on August 20, 2003. Both buildings were restored.
2005-07	THS purchased properties at 109 Lange and 90 W. Wattles Road and donated the land to the City to expand the Village to 4.89 acres.
2007-09	THS retained Hopkins Burns Design Studio to complete an expanded Master Site Plan for the Village.
2010-13	THS relocated the Niles-Barnard House to the Village and completed exterior repairs and sufficient interior repairs to receive conditional occupancy for staff, volunteers and potential donors.
2021	City of Troy completes historic rehabilitation of the Niles-Barnard House and THS provides furnishings and historic interpretation.

From 1969 to 2017 these facility projects were funded by \$1,364,375 of THS cash contributions and thousands of volunteer hours. If not for the advocacy and dedication of the Troy Historical Society, Troy may have lost these pieces of the past as it developed into the modern city it is today.

During the 40-year development of the Troy Historic Village, THS and the City of Troy have maintained a positive, cooperative, public-private partnership. THS worked methodically to preserve the community's heritage by expanding the historic resources of the Village. The Society contributed additional funds for programs and special events. THS volunteers also donate, on average, 3,000 hours of volunteer service annually. The City of Troy accepted ownership of the land, buildings and collections and provided funds to maintain and manage the Village through the City budget. The Village staff who developed programs and services and provided administrative support were originally City employees.

By 2009 the operations budget of the Village was over \$500,000 and the facility was staffed by two full-time and eight part-time employees. Over 26,000 people visited the facility that year, including 12,000 students and chaperones who participated in regionally recognized education programs.

Significant events in 2005 and 2010 changed the vision and work of the THS. In 2005, the 1837 Niles-Barnard House was donated to the City under the condition that it be relocated to the Village within five years. This prompted THS to purchase land to expand the Village and to envision a cultural destination that would meet the needs of the 21st century. The Society retained historic preservation architects to develop a new site plan that was unanimously approved by Troy's Planning Commission and City Council in 2009. Less than a year later, the City of Troy grappled with declining tax revenues due to the Great Recession. As part of major cuts in 2010, the Village budget was reduced 60%, a majority of staff members were laid off, and the Village facilities were slated for closure on June 30, 2011.

THS leadership determined that THS should keep the Village open by assuming operational management of the Village facilities. In May 2011, the THS Board of Trustees and City Council approved a renewable five-year management agreement, which was amended and renewed in 2016 for ten years. The major provisions of the current agreement are:

- The City retains ownership of the land, buildings, and collections. It is financially responsible for "core services" including utilities, insurance, the security system, repairs to the buildings, and seasonal maintenance of the grounds.
- The City also provides for an annual assessment of the historic buildings by a recognized historic preservation architect. This assessment will include a rolling five-year plan for capital repairs for the buildings to assist the City in preparing appropriate budgets.
- The City Manager assigns a liaison to facilitate payment of City-funded capital projects and communication with the THS leadership and Village staff.
- THS hires a full-time professional executive director to manage the Village.
- THS assumes fiscal responsibility for all Village staff, program expenses, collections management and expenses incurred in daily operations other than "core services."
- THS provides an annual report and audited financial statement to the City of Troy.

In 2011 and 2012 THS successfully transitioned to a nonprofit business with employees and management responsibilities. The organization implemented a lean budget, and developed new policies and procedures for bookkeeping, accounting, and human resources. Staff revived programs that had been reduced or eliminated in 2010, recruited and trained new volunteers, and created a new brand for the Village.

In 2013 THS adopted its first Strategic Plan—a comprehensive review the Village and operations, a look at the critical issues facing THS, and vision for growth. The three-year strategic plan provided a pathway to improve fiscal and organizational sustainability for THS and the Village. The Society recruited a more diverse Board, expanded regional awareness, improved branding and marketing including the development of a mobile-friendly website, and increased its community outreach. A second five-year Strategic Plan was developed and implemented in 2016. THS worked to increase community partnerships, further develop the interpretation and accessibility of the Village and collections, and better understand the needs of the community. With the Niles-Barnard restoration still incomplete, it became a key component of the 2016-2022 Strategic Plan. Working with the City of Troy, restoration plans were revised to focus programming and rental usage of the main floor and reducing overall project cost. The City of Troy approved \$700,000 in their 2019-2020 budget and the Niles-Barnard restoration was completed in 2021. An official ribbon cutting ceremony on June 7<sup>th</sup>, 2021, was the completion of Harriet Barnard's wish, the City's gift agreement, and THS's vision of expanding the capacity of the Village.

The 2020 Covid-19 Pandemic is another story of THS adjusting to a changing environment. School and business shutdowns abruptly halted programs, activities, and fundraisers in the Village's busiest season. Village staff worked from home and with THS Board support began modifying, expanding, and developing programs for a Covid climate. The Society became more flexible by implementing a 6-month budget and closely monitoring cash flow. In the end, the work of the staff coupled with generous donor support, and city, county, state and federal Covid funding enabled us to maintain safe, quality programming while retaining our talented and creative staff. In 2022, THS finds itself in the position to take the best programs and practices from the Covid pandemic, bring back core field trip programs, and chart a direction to further financial stability and organizational growth.

**GOALS, OBJECTIVES, and STRATEGIC PRIORITIES**

**GOALS** are the clearer statements of vision. **OBJECTIVES** are what will be accomplished. **STRATEGIC PRIORITIES (Strategy)** specify the accomplishment to be achieved if the vision is to become real. These are outcome statements to guide the Troy Historical Society as an organization.

**GOAL 1 – Establish and maintain short-term and long-term financial stability**

**Objective 1:** Identify diverse funding streams, evaluate and prioritize those with greatest potential

- Strategy:** Analyze current and design optimized budget distributions
- Strategy:** Develop long-term revenue generation opportunities including an endowment and legacy giving
- Strategy:** Explore the possibility of a city millage
- Strategy:** Determine current programmatic (education) and facilities revenue generation and potential of increase

**Objective 2:** Create and develop a Fund Development Committee

- Strategy:** Develop and implement a Fund Development Plan which may include the following streams of funding:
  - advertising
  - corporate partnerships
  - corporate sponsorships
  - City of Troy funding
  - state funding
  - grants
  - fundraising activities

**Objective 3:** Establish a cash reserve for short-term stability



**GOAL 2 – Prepare for changes within the community, environment, and economy**

**Objective 1:** Recruit, hire, support, and retain quality staff

**Objective 2:** Recruit and activate a dynamic board aligned with the village mission and vision

**Strategy:** Ensure board members have personal and professional connections and partnerships to leverage strengthening impact of THV's mission

**Objective 3:** Recruit, support and retain quality volunteers

**Objective 4:** Create, develop, and provide quality programs

**Strategy:** Evaluate overall success and cost effectiveness of all current programs, identify/create new programs, and improve current programs to ensure connection to the mission and an overall positive return on investment

- Create new programs that work in a post-Covid environment

**Strategy:** Explore technology opportunities in programs and access

- Explore remote programs and displays

**Objective 5:** Construct network of private/city/regional historic villages

**GOAL 3 - Ensure diversity within the board, staff, and those served****Objective 1:** Broaden board representation and diversity**Strategy:** Create a matrix to identify:

- current and future skills needed on the board in finance, marketing, legal, fund development, and potential new board members
- community partnerships that may be strengthened through board membership, may include School board members, Troy Chamber members, or others

**Strategy:** Increase active engagement as community ambassadors**Objective 2:** Broaden staff representation, diversity, and understanding**Strategy:** Identify existing and desired staff skills and staff experience

- Provide training for existing staff to increase knowledge, skills, experience

**Objective 3:** Identify and utilize strategic partners**Strategy:** Identify partners among public and private schools and districts, the Troy business community, Troy cultural communities, and other “gaps” identified

**GOAL 3 - Ensure diversity within the board, staff, and those served, continued**

**Objective 4:** Understand and identify the communities THV should serve

**Strategy:** Define the market(s) for THV

- Identify the needs of our market(s)
- Identify key geographic areas to serve
- Identify specific segments/demographics (parents with children, ethnically diverse immigrants, etc.)

**Strategy:** Increase value to those served (existing and potential)

- Evaluate existing and future programs -profitability and driving increased community participation levels (Is the juice worth the squeeze?) (Related to #2)

**Strategy:** Identify and execute a plan of communication

- Identify traditional and nontraditional (virtual) marketing and advertising strategies

**GOAL 4 - Establish THV as a cultural asset/resource to the Troy community and surrounding region**

**Objective 1:** Better position THV for collecting and disseminating local history

**Strategy:** Engage in current events with the purpose of knowing/understanding how they become history

**Objective 2:** Become a resource and ally for local Historic Preservation

**Objective 3:** Enhance all visitor experiences

**Strategy:** Improve the Drop-In visitor experience

**Strategy:** Increase access to the village and to programs (physical and virtual) with continuous improvement of both

**Objective 4: Increase public awareness of THV and offerings**

**Strategy:** Identify and implement marketing to the public in existing and new ways as the marketing climate changes

- Track the effectiveness and reach of marketing tools
- Explore opportunities for non-paid marketing (HOAs, organizational newsletters, etc.)

**Strategy:** Participate in community events and other community organizations' events

**GOAL 5 – Optimize Resources****a) Talent of board, staff, and volunteers b) artifacts and knowledge and c) facilities****Objective 1:** Optimize existing Facilities**Strategy:** Increase curb appeal (to attract visitors)**Strategy:** Develop best use of physical space in all buildings and of 5 acres of outdoor space**Objective 2:** Reimagine Master Plan with the City of Troy**Strategy:** Improve visitor flow and parking lot size and usage**Strategy:** Create a multi-use welcome/visitor center**Strategy:** Create outdoor teaching spaces**Objective 3:** Optimize use of artifacts and knowledge**Strategy:** Increase programming use and create seasonal rotations for “fresh views”**Strategy:** Ensure accessibility to the public and availability for use by community partners**Strategy:** Establish commercial displays (mini-exhibits)**Objective 4:** Create plan for continuous improvements and growth**Strategy:** Identify corporate support and expertise for success in modern world (related to #1 and #3)**Strategy:** Identify greater opportunities and responsibilities