



# Surface Creek Valley Historical Society Strategic Plan

12/19/2012

Revised 6/13/2014

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Revised 3/29/2017

Greg Hart, President

## Mission Statement

Maintain and improve an accurate repository for the preservation of the history of Surface Creek Valley and operate Pioneer Town Museum, Welcome Center, Chapel of the Cross, Stolte Shed and Charlie Baker Arboretum for the education and enjoyment of the public.

## INTRODUCTION

This Strategic Plan is intended to guide the Board of Directors as written until it is revised. It serves as guidelines for the Board to expend funds and provide overall direction. This revision was developed over a three month period and finalized at a Board Strategy Meeting on March 29, 2017.

There are three broad goals, each of which has one or more objectives; these **are not** listed in any particular priority order. However, each action item, under its appropriate goal and objective, is displayed **in priority order**.

Several action items appear to require a capital outlay of funds. These items have also been prioritized and are as follows:

1. Install solar parking lot lights at the Welcome Center (Goal #2, Objective #1, Action #1).
2. Install an irrigation well and pumping system (Goal #1, Objective #1, Action #1).
3. Refurbish the Stolte Shed (Goal #1, Objective #1, Action #2).
4. Improve the security of the Indian Museum and its contents (Goal #1, Objective #1, Action #3).
5. Erect Wind Mill on Front lot (Goal #1, Objective #4, Action #1).
6. Winterize the Welcome Center (Goal #1, Objective #1, Action #4).
7. Consider hiring an accounting firm (Goal #3, Objective #1, Action #3).

The following table displays the goals, objectives, action items **in priority order**, and the individual Board Member/volunteer who is accountable for that action item. They are delegated full responsibility for organizing, directing, and accomplishing that action item as they so determine and providing feedback and accomplishment status to the Board of Directors.

## GOAL #1: DEVELOP AND MAINTAIN A STRONG FINANCIAL BASE

### OBJECTIVE #1: MINIMIZE LONG TERM EXPENSE.

Action #	Responsibility	Target Date or Schedule	Suggested Reporting Method	Results
1. Install irrigation well and pumping system for landscape irrigation	Richard Udd	Spring / summer 2017	<ul style="list-style-type: none"> <li>• Well Committee report.</li> <li>• BoD minutes</li> </ul>	
2. Clean out, insulate sidewalls, install moisture barrier and ventilate Stolte Shed crawl space. Insulate both staircase door openings.	Les Mergelman	CY 2017	<ul style="list-style-type: none"> <li>• Contract completion.</li> </ul>	
3. Improve increased security and preservation for all items in the Indian Museum.	Bruce Joss	CY 2017	<ul style="list-style-type: none"> <li>• Contract completion</li> </ul>	
4. Fully winterize Welcome Center. Clean out crawl space, insulate sidewalls, install moisture barrier and ventilate with automatic fan. Finish chinking and calking all log copes.	Les Mergelman	CY 2017	<ul style="list-style-type: none"> <li>• Contract completion</li> </ul>	
5. Xeriscape certain appropriate existing lawn or garden areas & remove irrigation system in those areas	Greg Hart	Spring / Summer	<ul style="list-style-type: none"> <li>• Grounds Committee Report</li> <li>• Maps</li> </ul>	

### OBJECTIVE #2: INCREASE RENTAL INCOME ANNUALLY.

Action #	Responsibility	Target Date or Schedule	Suggested Reporting Method	Results
1. Annually adjust rental fees & preconditions, and SCVHS's services to be provided. See Goal #1, Objective #3, Action #1.	Bruce Joss	March BoD	<ul style="list-style-type: none"> <li>• BoD minutes</li> <li>• Rental Fee Schedule</li> </ul>	
2. Broaden and increase rental advertising & PR. See Goal 1, Objective 3, Action 3.	Olie Mowers	Monthly	<ul style="list-style-type: none"> <li>• Monthly written report from Rental Coordinator</li> </ul>	
3. Maximize rental occupancy and income.	Vernette Mackley Olie Mowers	Monthly		

**GOAL #1: STRONG FINANCIAL BASE (Cont.)****OBJECTIVE #3: INCREASE FUND RAISING EVENT REVENUE.**

Action #	Responsibility	Target Date or Schedule	Suggested Reporting Method	Results
1. Annually review and recommend to BoD minimum entry fees per event.	Bruce Joss Ray Hanson	March BoD meeting date	<ul style="list-style-type: none"> <li>BoD minutes</li> <li>Event records</li> </ul>	
2. Avoid competing events in setting event schedule	Bruce Hovde	Dec BoD meeting date	<ul style="list-style-type: none"> <li>BoD minutes</li> <li>Event records</li> </ul>	
3. Broaden & increase event advertising & PR	Vernette Mackley Olie Mowers	At least one month prior to event	<ul style="list-style-type: none"> <li>Event Committee report &amp; advertising records.</li> </ul>	
4. Broaden attractiveness of each event	Each Event Coordinator	At least two months before event	<ul style="list-style-type: none"> <li>Event plan &amp; advertising records</li> </ul>	
5. When possible pair event with other related observances (example: pair Ice Cream Social with National Ice Cream Month and Day)	Each Event Coordinator	At least two months before event	<ul style="list-style-type: none"> <li>Event plan &amp; advertising records</li> </ul>	

**OBJECTIVE #4: INCREASE MUSEUM REVENUE.**

Action #	Responsibility	Target Date or Schedule	Suggested Reporting Method	Results
1. Erect more prominent Pioneer Town signage (Wind Mill). Consider a painted sign on Stole Shed roof.	Les Mergelman Richard Udd	Before opening day 2017	<ul style="list-style-type: none"> <li>BoD minutes</li> </ul>	
2. Annually review and adjust museum entry fees in keeping with prevailing area museum entry fees	Bruce Joss Ray Hanson	By April BoD meeting	<ul style="list-style-type: none"> <li>BoD minutes</li> <li>Annual entry fee schedule</li> </ul>	
3. Appropriately select and price gift shop items	Greg Hart	By opening day & ongoing thereafter	<ul style="list-style-type: none"> <li>Gift shop report</li> </ul>	
4. Increase museum visitations by broadening and increasing museum advertising and PR	Olie Mowers	PR master plan by 1 <sup>st</sup> of April. Ongoing thereafter	<ul style="list-style-type: none"> <li>PR Committee report.</li> <li>Visitor counts</li> <li>Monthly P&amp;L</li> </ul>	

**GOAL #1: STRONG FINANCIAL BASE (Cont.)****OBJECTIVE #5: SUBJECT ALL SCVHS EVENTS TO AN ANNUAL SUNSHINE REVIEW PROCESS.**

Action #	Responsibility	Target Date or Schedule	Suggested Reporting Method	Results
1. Review proposed events and evaluate (effort, attendance, and revenue) in terms of each event's viability in meeting SCVHS's mission and goals.	Bruce Joss Ray Hanson	March BoD meeting	<ul style="list-style-type: none"> <li>BoD minutes</li> </ul>	

**OBJECTIVE #6: ACQUIRE ADDITIONAL FUNDING SOURCES.**

Action #	Responsibility	Target Date or Schedule	Suggested Reporting Method	Results
1. Seek grant funding for specific projects & needs	Bruce Joss	Ongoing	<ul style="list-style-type: none"> <li>Grants requests &amp; awards</li> </ul>	
2. Consider/establish building sponsorship program	Greg Hart Doris McGuire Ray Hanson	Ongoing	<ul style="list-style-type: none"> <li>BoD minutes</li> </ul>	
3. Develop donors	Greg Hart	Ongoing	<ul style="list-style-type: none"> <li>Report to BoD</li> </ul>	
4. Consider/establish Pioneer Town Christmas festival / lights display	Greg Hart	Spring 2017 BoD	<ul style="list-style-type: none"> <li>BoD minutes</li> </ul>	

**GOAL #2: SCVHS WILL BE VALUED AS A QUALITY EDUCATIONAL, COMMUNITY AND REGIONAL ASSET, AND PIONEER TOWN RECOGNIZED AS A QUALITY MUSEUM, ACTIVITY LOCATION, AND TRAVEL DESTINATION.**

**OBJECTIVE #1: INCREASE THE SOCIETY’S PUBLIC PRESENCE.**

Action #	Responsibility	Target Date or Schedule	Suggested Reporting Method	Results
1. Improve public safety by installing solar lights in the main parking lot.	Greg Hart Ray Hanson	CY 2017	<ul style="list-style-type: none"> <li>BoD minutes</li> </ul>	
2. Expand educational programs to every grade school in Delta County emphasizing the Surface Creek Valley.	Doris McGuire Jane Everett	Ongoing	<ul style="list-style-type: none"> <li>Report on accomplishments</li> </ul>	
3. Publish & distribute quarterly membership newsletter.	Jane Everett	Quarterly	<ul style="list-style-type: none"> <li># Newsletters</li> </ul>	
4. Utilize social media outlets	Jane Everett	Ongoing	<ul style="list-style-type: none"> <li>Report</li> </ul>	
5. Continue upgrade of website	Jane Everett	Ongoing	<ul style="list-style-type: none"> <li>Report on website “hits”</li> </ul>	
6. Acquire SCV mailing and emailing lists & publish and distribute an annual report / membership drive material	Greg Hart	Annually, Spring	<ul style="list-style-type: none"> <li>Annual report</li> </ul>	
7. Establish speakers bureau & notify community and regional organizations of its availability		Ongoing	<ul style="list-style-type: none"> <li>Report on speaking engagements</li> </ul>	

**GOAL #2: QUALITY ASSET (Cont.)**

**OBJECTIVE #2: THE HISTORICAL REPOSITORY WILL MEET PROFESSIONAL HISTORICAL ARTIFACTS STANDARDS AND, AS APPROPRIATE, BE PUBLICLY ACCESSIBLE VIA TRADITIONAL AS WELL AS MODERN ELECTRONIC MEANS.**

Action #	Responsibility	Target Date or Schedule	Suggested Reporting Method	Results
1. Provide resources for SCVHS's curator(s) to obtain training / certification	Greg Hart Jane Everett	Ongoing	<ul style="list-style-type: none"> <li>• Annual Curator training budget</li> <li>• Curator report of training or certification</li> </ul>	
2. Seek, collect, and preserve local historical artifacts (including digitization where appropriate)	Jane Everett	Ongoing	<ul style="list-style-type: none"> <li>• Curator report</li> </ul>	
3. Provide online retrieval of appropriate archival records		Ongoing	<ul style="list-style-type: none"> <li>• Digital archive "hits"</li> </ul>	
4. Establish a research library		Ongoing	<ul style="list-style-type: none"> <li>• BoD minutes</li> </ul>	
5. Modernize memorials		When feasible	<ul style="list-style-type: none"> <li>• BoD minutes</li> </ul>	

**GOAL #2: QUALITY ASSET (Cont.)**

**OBJECTIVE #3: THE PIONEER TOWN MUSEUM VOLUNTEER STAFF WILL BE TRAINED TO PROVIDE MUSEUM VISITORS AN ENRICHED EXPERIENCE.**

Action #	Responsibility	Target Date or Schedule	Suggested Reporting Method	Results
1. Establish training program for volunteers who interact with the public	Vernette Mackley Olie Mowers	Ongoing	• Training sessions	
2. Develop volunteer “Position descriptions”	Olie Mowers	Spring 2017	• Descriptions	
3. Provide up-to-date SCVHS and Pioneer Town calendars of events and of SCVHS volunteer contacts	Olie Mowers		• Coordinator report to BoD	
4. Provide Pioneer Town museum and SCV history-related written materials for volunteers to consult and to distribute to museum visitors	Olie Mowers	Opening week and ongoing	• Coordinator report to BoD	

**OBJECTIVE #4: DEVELOP, IMPROVE AND MAINTAIN EFFECTIVE ALLIANCES AND RELATIONSHIPS WITH OTHER AREA ORGANIZATIONS TO PROMOTE AN INTERCHANGE OF IDEAS AND EFFORTS FOR THE MUTUAL BENEFIT OF THE INVOLVED ORGANIZATIONS.**

Action #	Responsibility	Target Date or Schedule	Suggested Reporting Method	Results
1. Identify targeted organizations	Bruce Hovde Ray Hanson	Spring / Summer 2017	• List of organizations	
2. Establish liaison with targeted organizations	Bruce Hovde Ray Hanson	Spring / Summer 2017	• Liaison’s established	
3. Recruit & train volunteer docents from our local schools	Olie Mowers Jane Everett	2017	• # trained	
4. Establish a genealogy “section” of the SCVHS		2017	• Bylaws revised	
5. Establish a Chapel of the Cross “section” of the SCVHS		2017	• Dito	
6. Establish a garden club / arboretum “section” of the SCVHS		2017	• Dito	



**GOAL #3: OPERATE LEGALLY AND EFFICIENTLY WITHIN A FRAMEWORK OF BEST MANAGEMENT PRACTICES (BMP).**

**OBJECTIVE #1: WITHIN BUDGETARY CONSTRAINTS, MINIMIZE ADMINISTRATIVE IMPACTS UPON VOLUNTEERS AND COORDINATORS.**

Action #	Responsibility	Target Date or Schedule	Suggested Reporting Method	Results
1. Provide automated / digitized means for membership process including online membership dues payments	Jane Everett	Winter 2017	<ul style="list-style-type: none"> <li>• PayPal system established</li> <li>• Online membership system established</li> <li>• Membership Committee reports # established or renewed online</li> </ul>	
2. Provide online means for donations	Jane Everett	Winter 2017	<ul style="list-style-type: none"> <li>• PayPal system established for donations.</li> <li>• \$ donations received online</li> </ul>	
3. Analyze engaging an accounting firm (or other) for financial transactions and record keeping	Bruce Hovde Phyllis Dahl	When financially able	<ul style="list-style-type: none"> <li>• Financial responsibility transferred to accounting firm</li> </ul>	
4. Provide automated / digitized means for the rental process including online rental payments	Jane Everett	Winter / Spring 2017	<ul style="list-style-type: none"> <li>• PayPal system established</li> <li>• Online rental system established</li> <li>• Rental Coordinator reports # memberships established or renewed online</li> </ul>	

**OBJECTIVE #2: RECOGNIZE AND AWARD VOLUNTEERS ON A REGULAR BASIS.**

Action #	Responsibility	Target Date or Schedule	Suggested Reporting Method	Results
1. Formalize an annual volunteer award program by establishing categories and criteria.	Greg Hart Verette Mackley	Spring 2017	<ul style="list-style-type: none"> <li>• Written award program</li> <li>• BoD minutes</li> </ul>	