

Strategic Planning 101

Kentucky Museum and Heritage Alliance Annual Conference

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Why is strategic planning important?



- ▶ Conveys the impact of change on the organization and the community
- ▶ Establishes budgeting and funding priorities
- ▶ Efficiently allocates scarce resources
- ▶ Brings consistency and stability to the organization
- ▶ Creates a sense of shared responsibility
- ▶ Moves people to action

Shelby County Historical Society

A rich organizational history with beginning in 1929.

Significant Pattern of Success

- 2 County History Publications
- Former KY Governor Residence purchase, renovation & subsequent sale
- History Camp
- Civil War Memorial researched, archived and established
- Purchase, renovation and opening of historic property as a welcome center and museum
- Creation of Tapestry, African American Heritage program
- Ongoing programs and events



SHELBY COUNTY HISTORICAL SOCIETY
Shelbyville, Kentucky

Creating the Plan

Built Upon Core Values

- ▶ Relational - enjoy working with others who share this common interest.
- ▶ The quality of website, programs, exhibits and quarterly newsletter.
- ▶ The dedication, enthusiasm, loyalty and energy of the members in preserving our history.

Tied to Mission

The Shelby County Historical Society preserves and promotes knowledge and appreciation of Shelby County and Kentucky history.

Prioritized Goals

- ▶ To be more inclusive in order to gain new and younger members
- ▶ Get a staff person on Board
- ▶ Keep the museum open longer hours and/or expand the museum

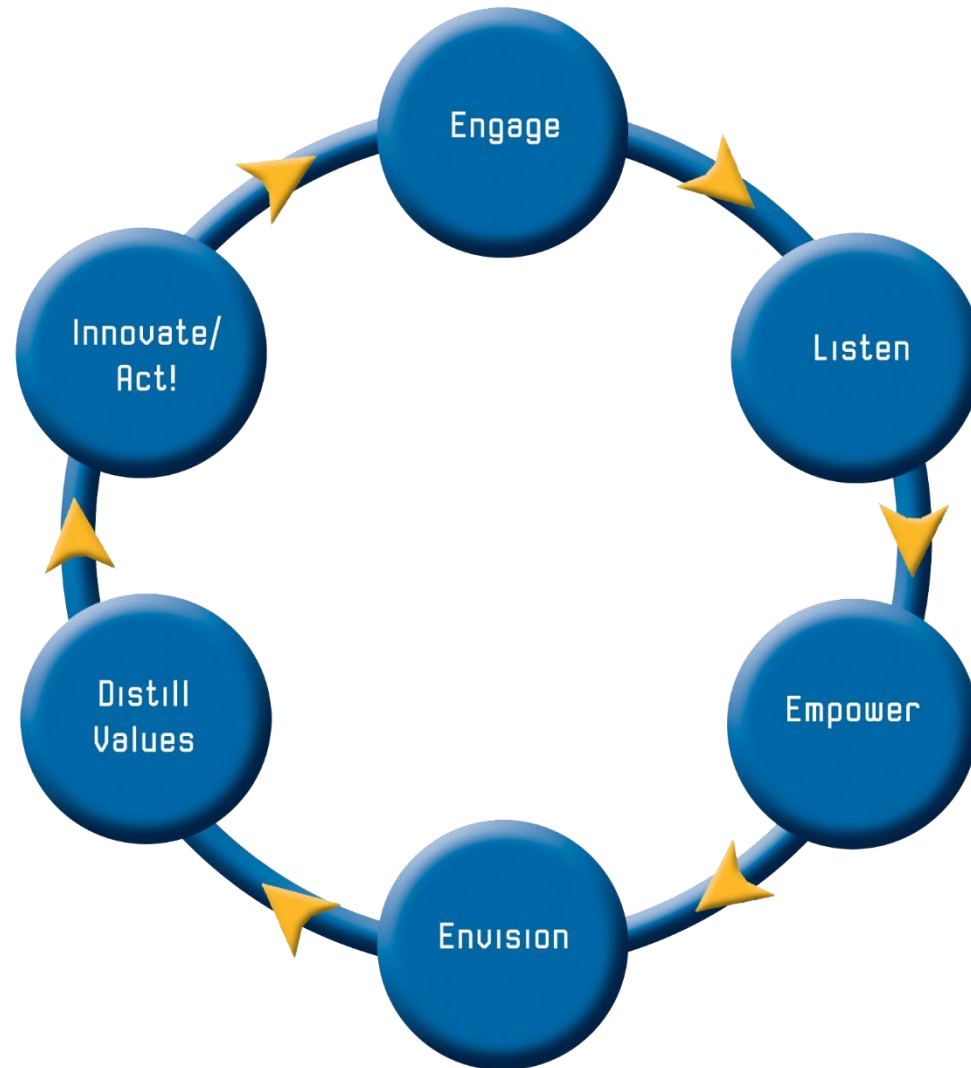


Elements of a Strategic Plan



- ▶ Vision
- ▶ Mission Statement
- ▶ Values Statement
- ▶ Brand or logo
- ▶ Situational analysis
- ▶ SWOT
- ▶ Goals and objectives
- ▶ Measurement tools
- ▶ Timelines/milestones
- ▶ Budgets

How Do We Begin?



Who Should be Engaged in the Planning Process

- ▶ Board Members
- ▶ Membership
- ▶ Community Elected Leaders and Key Community Decision Makers
- ▶ All Residents
- ▶ Youth and Young Adults



How to Decide What is Needed

- ▶ Has your organization done planning in the past?
- ▶ Are you updating an old plan or creating a new plan from scratch?
- ▶ Is it a specific issue or project you want input on, or much broader?
- ▶ Does the organization want direct input or indirect?
- ▶ Is the organization prepared to take action?

Key Questions:

Does it have an impact on the greater community beyond historians or preservationists?

If so, are you ready for the public to get involved in the discussion?

Engage - It's a Campaign and It's Personal!

7 Keys to Engaging your Members



1. Press Release
2. Door-to-Door
3. Phone Script
4. Public Service Announcements
5. Social Media - Facebook and Twitter
6. Newsletter
7. Website Newsletter



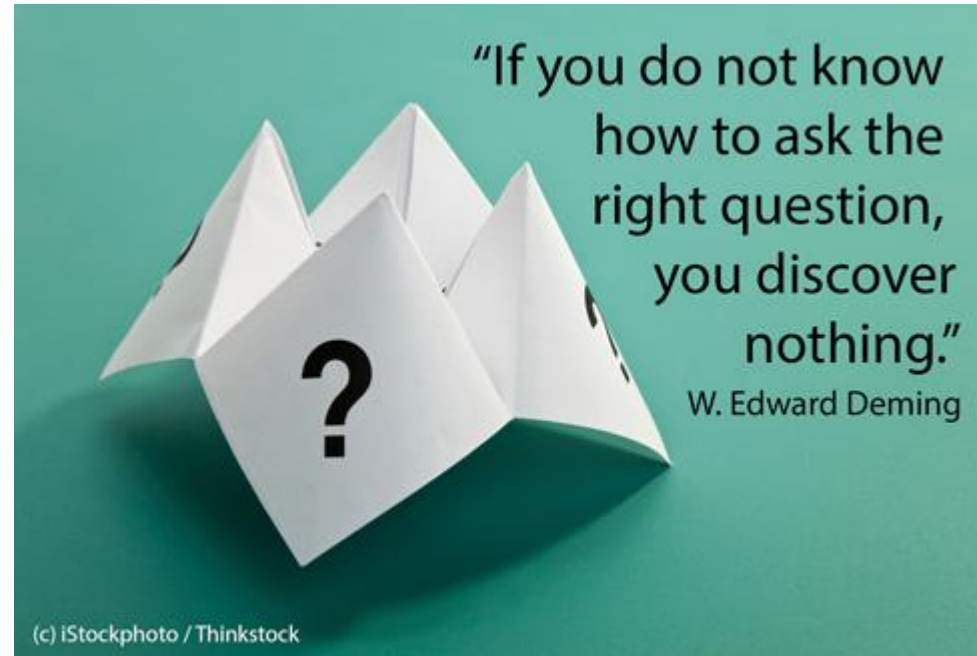
How many people should I expect?

- ▶ How many members do you have
- ▶ How hard are you willing to work
- ▶ Are you asking the public or just members



Listen - 3 Keys to Effective Listening

1. Ask the right questions
2. Ask the right people
3. Ask the right way



Empower - What are you asking me to do?

Deal Breakers

- ▶ Not asking people to do something
- ▶ Not expecting results
- ▶ Not holding people accountable
- ▶ Not following up to assess progress
- ▶ Not praising and celebrating success



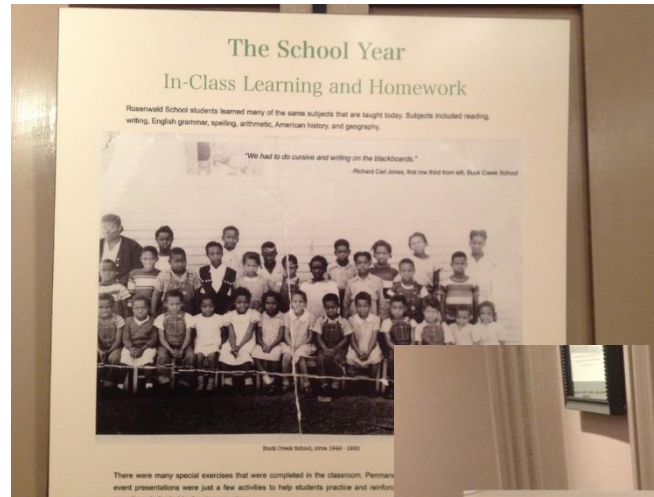
Empowerment Examples

- ▶ Volunteer to help with event or project
- ▶ Research specific topic
- ▶ Answer the phone
- ▶ Conduct an audit
- ▶ Host an event
- ▶ Fundraising



Envision - Seeing What Others Cannot

- ▶ Identify creative and visual folks within your community to help you see what others can't imagine
- ▶ Creativity cannot be taught
- ▶ Don't fear the change that creativity might bring
- ▶ Craft your vision to fit the values of your community



Distill Values

- ▶ Core values make an organization “unique.”
- ▶ Organizational values = Organizational Identity.
- ▶ Developing a plan without considering the values of the organization is a recipe for failure.
- ▶ Respecting values insures ownership of the plan.

Examples

- ▶ Having fun
- ▶ Preservation
- ▶ Our children
- ▶ Education
- ▶ Former members
- ▶ We support each other

Innovate and Act



Benefits of a Strategic Plan

- ▶ Gets everyone on the same page
- ▶ Creates a bond between people - we are in this together
- ▶ Prioritizes the use of scarce resources
- ▶ Let's everyone know you are serious about improving the community
- ▶ Creates a better quality of life



For More Information

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