



Fort Mill History Museum

2024 – 2026

Strategic Plan

(FMHM-RP-08-2024-2026)

Fort Mill History Museum
2024-2026 Strategic Plan
(Board Approval Date 3/15/24)

VISION:

Fort Mill History Museum to be recognized as the source in preserving, educating, and communicating Fort Mill’s history, and the champion for engaging members, visitors, and the community to continue building on the rich heritage of Fort Mill.

MISSION:

“TO PRESERVE FORT MILL’S HERITAGE FOR THE BENEFIT OF PRESENT AND FUTURE GENERATIONS.”

To promote the collection, preservation, educational interpretation, and display of those artifacts, documents, and events most representative of Fort Mill history, its people and institutions, and its cultural and economic development.

STRATEGIC PLAN PURPOSE

The Fort Mill History Museum Strategic Plan provides the course by which the organization will achieve its Vision and Mission. The Strategic Plan delivers the:

- process to communicate and promote the FMHM purpose and brand.
- structure to engage a continuous improvement mindset efficiently and effectively.
- initiatives to actively pursue to ensure organization innovation and accountability.

The Strategic Plan provides the FMHM Board of Director and members with the:

- means to succinctly design the optimum goals and objectives for the organization.
- ability to systematically review and monitor the organization’s goals to ensure resources are being adequately utilized and planned objectives are being achieved.
- method to focus attention so timely decisions can be made, and necessary actions taken to sustain the organization for the long term.

STRATEGIC PLAN SCOPE & DEVELOPMENT

The Fort Mill History Museum Strategic Plan scope consists of all facets of the organization including operations, events, programs, exhibits, research, administration, acquisitions, collections, and outreach. The Strategic Plan scope encompasses all entities assisting the organization to achieve its Vision and Mission. These entities include volunteers, members, staff, partners, associations, and government agencies. The Strategic Plan scope is for three years with a complete review and update of the document in the fourth quarter of each year by the FMHM Executive Team with final Board approval at the FMHM Board of Directors Retreat in February. The February Board of Directors discussion includes board member assignments and implementation schedules. The progress and status of current year goals are reported at each of the FMHM Executive Team Meetings and then sent to the Board of Directors.

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2024-2026 FMHM STRATEGIC PLAN OVERVIEW

The 2024-2026 Fort Mill History Museum Strategic Plan Overview consists of the expected growth component via museum visitors, engaging events, and educational venues. We completed the “Let’s Make the Mortgage History” campaign and paid off the mortgage with Mr. Jim Cammann in January 2023. The White Gallery was updated to convey more of Fort Mill’s story. The project was completed in December 2023, an informational session was held for the museum guides and a video was made to provide a teaching tool to the group if needed. The FMHM Newsletter is being dispersed quarterly and continues to receive positive feedback. Extended the museum advertising in both local and state publications. The museum received \$69,500 from the Town of Fort Mill Accommodations Tax grant to help with operational expenses, tree maintenance and major foundation repair. This is the 2nd year in a row the museum has received such a significant amount. The FMHM Board High School Representative program completed its 2nd year. They were able to plan, design, and implement their first event which was the Memory Mill of Fort Mill event on December 1, 2023. The event was sponsored by AME, Inc. and was a huge success. All three high schools participated in an art, literature, and photography contest. A history trivia challenge was held at Catawba Ridge and a local food pantry benefited with donations.

Worked with the Town of Fort Mill on the Strawberry Scavenger Hunt, Strawberry Fest & Jam beer sales, and several other beer sales fundraising events. Held the 2nd Annual Strawberry Soiree in April 2023 with a silent auction, DJ, dancing, food, wine pull, open bar, and an exhibit on Fort Mill’s 150th birthday celebration. The soiree was a financial success. The museum hosted several groups in the museum such as homeschool groups, Carolina Orchards, and other private groups. Pioneer Crafts at the Farmers Market and on the back porch were held from May to October. The October 2023 Lanterns & Legends tours were a huge success, most of the nights sold out, we doubled our private tour number and did 8 private tours. The museum held four Lunch & Learns, a book signing for Bayles Mack, started an FM History 101 Tour that runs from April to Oct., and held a very successful Old-Fashioned Christmas with Mr. & Mrs. Claus. This event was a great partnership with the Town. Built a stronger relationship with the York County Council who awarded the museum \$10,000 to put towards our building project. Museum and events attendance has continued to rise with an incredible 76% increase over the past three years.

The FMHM website activity and social presence has increased significantly in 2023 with further expansion planned in 2024. The archival of Fort Mill related items has reduced the backlog with increased interest by the community to contribute artifacts. For 2024 the plan includes the addition of much-needed Museum Guides, formerly called Front Desk Volunteers, to staff the museum during operating hours. 2023 brought some new Museum Guides but increasing the number of volunteers so

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each volunteer would only have to serve two three-hour shifts per month is the desired goal. The growth component of 2024 encompasses the successful achievement of the stated objectives by the responsible individuals which provide more bench strength for the organization. This requires existing resources to direct efforts on achieving value added deliverables by the planned due dates while also acquiring additional resources to provide much needed support for expanded capability. The desire is for the additional resources to be volunteers, however specific duties might be compensated for on a contractual basis. One part time compensated position was added at the start of January 2024 which was the Museum Services Coordinator. This position will assist C. Humburg with routine museum operations and volunteer coordination. There are no current plans to obtain additional employees in 2024, however a key objective is to determine an expanded employment plan for possible implementation in 2025 based on available funds. Some of the 2024 objectives are foundational elements which just as was accomplished in 2023, lay the groundwork for successful achievement of future years (2025-2026) objectives. Reporting of the financial/quantitative approved objectives is incorporated in the monthly financial reporting process. Reporting of the other approved objectives is incorporated in the FMHM Action Register (FMHM-RP-13) with the status updated monthly.

STRATEGIC PLAN GOALS & OBJECTIVES:

The Fort Mill History Museum Strategic Plan Goals and Objectives are presented together and as already noted, categorized by the Fort Mill History Museum Key Focus Areas.

Sustainability (SS) Focus Area

Goal SS-A

Goal Champion: David Ward (FMHM Chair)

Establish fiscal objectives with annual increases over the three-year period in membership, sponsorships, donations, and debt elimination. Investigate different types of funding sources, beyond the current ones, to expand the potential revenue streams of the Fort Mill History Museum. Ensure the museum achieves required annual revenue funding and maintains budget level expenditures.

Objective # SS-A1

Continue funding the \$60,000 FMHM museum operations six-month contingency account with the following projected levels for the next three years. 12/31/23 balance = \$20,000

1. Total savings account fund of \$25,000 by 12/31/24
2. Total savings account fund of \$30,000 by 12/31/25
3. Total savings account fund of \$35,000 by 12/31/26

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Objective # SS-A2

Maintain the \$20,000 FMHM Emergency Maintenance fund through 12/31/24 pending no emergent incidents occur in 2024.

Objective # SS-A3

Develop an initiative to increase FMHM Sponsorship contributions to \$50,000 by 12/31/24.

Objective # SS-A4

Implement an initiative to increase the number of FMHM members from previous year end.

1. 10% increase from 12/31/23 number by 12/31/24
2. 10% increase from 12/31/24 number by 12/31/25
3. 10% increase from 12/31/25 number by 12/31/26

Goal SS-B

Goal Champion: Jason Therrell (FMHM Vice Chair)

Review and update the FMHM Sustainability (Growth) Plan regarding the museum's future personnel, structures, and partnerships with the following objectives:

Objective # SS-B1

Analyze potential options and determine specific path forward of available options by 4/30/24.

Objective # SS-B2

Develop and implement a 2024 action plan with scheduled discussions, steps taken, and future considerations by 12/31/24.

Objective # SS-B3

Provide progress updates to the FMHM Board and Executive Team at scheduled meetings during 2024.

Goal SS-C

Goal Champion: Jan Martin

Implement the FMHM Planned Giving program for individuals to include the museum with monetary gifts from their wills/estates; consideration of archival items to donate to the museum; and issuing of life insurance policies on FMHM members.

Objective # SS-C1

1. Recruit three individuals to participate in the FMHM Planned Giving Program by 12/31/24.
2. Recruit three individuals to participate in the FMHM Planned Giving Program in 2025.
3. Recruit three individuals to participate in the FMHM Planned Giving Program in 2026.

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Exhibits/Presentations (EP) Focus Area

Focus Area Champion: TBD

Goal EP-A

Deliver exciting, inclusive, and relevant history exhibits and presentations both within the museum and external venues to ensure the organization provides creative and engaging exhibits for members and visitors to enjoy.

Objective # EP-A1

Develop and implement an extended Fort Mill History Museum Exhibit Plan which includes the following details: subject topic, estimated cost, implementation schedule, and opening presentation. The plan should be for three years (2024-2026) and be delivered to the Executive Director by 7/31/24.

Objective # EP-A2

Review the current museum layout script (describing the exhibits in each room) to ensure it aligns with current museum exhibits/displays. The review is to be completed by 4/30/24.

History Research (HR) Focus Area

Focus Area Champion: Megan Brinton (History Research Team Lead)

Goal HR-A

Deliver history research initiatives in a timely, accurate, and complete manner for use by the museum or as requested by external entities. Each research initiative is to follow the standards and process established by the FMHM History Research Team.

Objective # HR-A1

Complete the documentation and publishing of all eighteen (18) history topics on the FMHM website 6/30/24.

Acquisitions/Collections (AC) Focus Area

Focus Area Champion: Carson Cope (Collections & Special Projects Manager)

Goal AC-A

Ensure FMHM acquisitions/collections are maintained in a protective and complete manner including the timely processing of new receivables. Maintain an up to date and complete list of all FMHM documents, objects, items, and collections for viewing by museum members and staff for history research investigation and inquiries.

No specific objectives identified for 2024.

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Events/Programs/Outreach (EPO) Focus Area

Focus Area Champion: Christia Humburg (Executive Director)

Goal EPO-A

Determine FMHM events/programs that promote the museum; provide financial income; encourage corporate sponsorship and interest; attract tourists; increase membership; engages community involvement; and influences community outreach.

Objective # EPO-A1

Establish the FMHM Events & Program Leads for all recurring events/programs by 6/30/24.

Operations (OP) Focus Area

Goal OP-A

Goal Champion: James Shirey (Property & Facilities Team Lead)

Ensure the museum's existing property and facilities are maintained in an efficient and proactive manner by performing scheduled maintenance while also developing a long-term (multi-year) perspective. The scope includes routine (items requiring annual attention) and non-routine (projects) with the planned expenditures being a feeder to the annual FMHM budget.

Objective # OP-A1

Update the 2025-2029 five-year FMHM Property & Facilities master plan spreadsheet and provide to FMHM Executive Director by 11/30/24.

Goal OP-B

Goal Champion: Carol Case (Volunteer Coordination Team Lead)

Develop and maintain a robust volunteer program to ensure qualified and adequate individuals are available to provide Museum Guide support, support museum sanctioned events and programs, and deliver museum approved tours and discussions.

Objective # OP-B1

Deliver a FMHM Volunteer Training session for FMHM Museum Guide volunteers by 6/30/24. Completed on 3/5/24.

Objective # OP-B2

Develop and implement a FMHM Museum Guide Appreciation Event by 6/30/24.

Objective # OP-B3

Develop and implement a FMHM Volunteer Appreciation Event by 10/31/24.

Objective # OP-B4

Recruit, train, and develop additional Museum Guides in the following periods:

1. Ten (10) new Museum Guides by 12/31/24.

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2. Ten (10) new Museum Guides by 12/31/25.
3. Ten (10) new Museum Guides by 12/31/26.

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Appendix A

STRATEGIC PLAN STRUCTURE:

The Fort Mill History Museum Strategic Plan consists of three levels: 1) Strategic Cornerstones, 2) Goals, and 3) Objectives. Each of these levels build on each other and ensures the museum's efforts and resources are aligned to achieve the desired results in the most efficient and effective manner.

Strategic Cornerstones - foundation of the Strategic Plan and the four vital support declarations of the Fort Mill History Museum. The Strategic Cornerstones are rarely changed from year to year and assist with creating a consistence, value-added, and sustaining organization. The four Strategic Cornerstones are defined below in the "Strategic Cornerstones" section.

Goals – build on the four Strategic Cornerstones and establish the Fort Mill History Museum's overarching direction and primary destination that helps achieve the organization's vision. Goals outline the broad, long-term desired outcomes for the Fort Mill History Museum to achieve and define where the museum wants to be in the future. Each Goal is linked to one of the museum's six (6) Key Focus Areas to ensure alignment of the organization's plans, efforts, and initiatives. The FMHM Key Focus areas are:

1. Sustainability (members, sponsors, grants, endowments) – Instills integrity as the organization's key foundational element and provides governance, oversight, and strategic direction to ensure fiscal responsibility, sound operations, and long-term sustainability.
2. Exhibits/Presentations – Manages the museum exhibits and presentations.
3. History Research – Investigates and documents immediate or pending local history research requests and point of contact for reviewing historical related donation items from the community.
4. Acquisitions/Collections – compiles, documents, and maintains the museum's historical collections and archives.
5. Events/Programs/Outreach – Develops and implements all museum events, programs, and outreach initiatives.
6. Operations (Volunteers, Assets, Financial Reporting) – ensures effective and efficient museum operations which includes volunteer coordination; database coordination, social media coordination and website oversight; docent training; maintenance of property and facilities; finance management; and technology management.

Objectives - provides the specific tactical and action elements to be achieved which will deliver the desired results and help fulfill the Fort Mill History Museum Strategic Plan. Objectives are implemented, measured, and evaluated to determine if the strategic plan is achieving the desired results. Objectives are embedded within each of the Strategic Plan Goals and are developed using the SMART parameters of **S**pecific, **M**easurable, **A**chievable, **R**elevant, and **T**ime bound.

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Appendix B

STRATEGIC CORNERSTONES:

The Fort Mill History Museum Strategic Plan four (4) Strategic Cornerstones are:

1. Enhance the Product and Brand:

- a. Ensure museum focus is on relevant historical events, programs, and initiatives by continuing to use member, visitor, and community solicitation to validate and enhance products and services.
- b. Leverage the influence of Fort Mill History Museum collections, information, and resource capabilities to build and strengthen strategic partnerships with key, compatible organizations to provide value to members and enhance our reputation.
- c. Enhance the core deliverables of the Fort Mill History Museum by continuing to improve the quality, timeliness and effectiveness of sponsored events, programs, and initiatives.
- d. Enhance member, visitor, and community engagement and support by providing effective and value-added information, events, and programs.
- e. Appeal as a tourist destination to engage visitors and friends by providing a value-added experience.

2. Stimulate Member and Community Involvement: Engage members in the Fort Mill History Museum’s mission by enhancing communication, improving events and programs, delivering historically significant information, and preserving relevant historical artifacts and items.

3. Maintain a Sustainable Organization: Maintain a sustainable organizational structure with disciplined governance, financially responsible, long-term focus, and effective succession planning.

4. Secure Museum Valuables and Property: Maintain an effective and efficient framework that assures the security and condition of Fort Mill History Museum collectables, information, and resources. This includes maintenance on museum structure, assets, and equipment.