



Fort Mill History Museum

2023 – 2025
Strategic Plan
(FMHM-RP-08-2023-2025)

Fort Mill History Museum
2023-2025 Strategic Plan
(Board Approval Date 1-7-2023)

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 January. The January 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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2023-2025 FMHM STRATEGIC PLAN OVERVIEW

The 2023-2025 Fort Mill History Museum Strategic Plan Overview consists of the expected growth component via museum visitors, engaging events, and educational venues. The museum was able to operate for the entire 2022 at regular hours. The October 2022 Lanterns & Legends Tours were successful and was very well received by the community. The museum has increased engagement with local businesses for shared fundraisers and broader partnerships with the Town of Fort Mill. The FMHM website activity and social presence has increased significantly in 2022 with further expansion planned in 2023. The archival of Fort Mill related items has reduced the backlog with increased interest by the community to contribute artifacts. For 2023 the plan includes the addition of much needed Front Desk Volunteers to staff the museum during operating hours. 2022 brought some new Front Desk Volunteers but increasing the number of volunteers so each volunteer would only have to serve two three-hour shifts per month is the desired goal. An expansion of planned events and programs will be pursued in 2023 to return to a pre-Covid number. The growth component of 2023 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 on a contractual basis. There are no current plans to obtain additional employees in 2023 however a key objective is to determine an expanded employment plan for possible implementation in 2024 based on available funds. There are tentative plans to expand the usage of unpaid interns in 2023. A significant accomplishment in 2022 was the Let's Make the Mortgage History campaign. Even though the goal of \$65,000 was not achieved by 12/31/22, almost \$54,000 was raised which will allow the museum to retire the mortgage in January 2023. Some of the 2023 objectives are foundational elements which just as was accomplished in 2022, lay the groundwork for successful achievement of future years (2024-2025) 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.

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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: Executive Team

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:

1. Total savings account fund of \$10,000 by 12/31/23
2. Total savings account fund of \$15,000 by 12/31/24
3. Total savings account fund of \$20,000 by 12/31/25

Objective # SS-A2

Continue funding the \$20,000 FMHM Emergency Maintenance account with the following projected levels:

1. Total emergency maintenance fund \$10,000 by 12/31/23
2. Total emergency maintenance fund of \$15,000 by 12/31/24
3. Total emergency maintenance fund of \$20,000 by 12/31/25

Objective # SS-A3

Develop an initiative to increase FMHM Sponsorship contributions to \$50,000 by 12/31/23.

Objective # SS-A4

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

1. 10% increase from 12/31/22 number by 12/31/23
2. 10% increase from 12/31/23 number by 12/31/24
3. 10% increase from 12/31/24 number by 12/31/25

Objective # SS-A5

Ensure FMHM planned revenue is achieved in 2023.

Objective # SS-A6

Ensure FMHM budgeted expenditure is maintained and not exceeded in 2022.

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Goal SS-B

Goal Champion: Board Chair

Present and implement FMHM Sustainability (Growth) Plan regarding the museum's future personnel, structures, and partnerships.

Objective # SS-B1

Implement FMHM Sustainability (Growth) Plan approved 2023 initiatives by 12/31/23.

Goal SS-C

Goal Champion: Executive Director

Ensure all open leadership positions within the organization are filled with enthusiastic and qualified individuals. Perform an assessment on all coordinators and team lead positions to collect feedback and potential areas for improvement.

Objective # SS-C1

Recruit candidates for the following open positions: 1) Exhibits/Presentations Coordinator and 2) Events/Program Coordinator and have them filled by 4/30/23.

Objective # SS-C2

Initiate an FMHM Coordinator and Team Lead Review by surveying all current FMHM coordinators and team leads then provide results to Executive Team by 9/30/23.

Goal SS-D

Goal Champion: Board Chair

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-D1

Develop an action plan to obtain at least three individuals to participate in the FMHM Planned Giving Program by 12/31/23.

Exhibits/Presentations (EP) Focus Area

Focus Area Champion: Exhibits Coordinator

Goal EP-A

Deliver exciting 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

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presentation. The plan should be for three years (2023-2025) and be delivered to the Executive Director by 7/31/23

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 4/30/23.

Objective # EP-A3

Develop the FMHM 2024-2026 Exhibit/Presentations Plan to include at least one new exhibit in the three-year period. Plan to be delivered to the FMHM Chair by 10/31/23

History Research (HR) Focus Area

Focus Area Champion: 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 4/30/23.

Acquisitions/Collections (AC) Focus Area

Focus Area Champion: 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.

Objective # AC-A1

Document the entire FMHM acquisitions/collections archival and storage process including data backup schedule and provide the completed document to the Executive Director by 5/31/23.

Events/Programs/Outreach (EPO) Focus Area

Focus Area Champion: Executive Director

Goal EPO-A

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

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Objective # EPO-A1

Develop the FMHM 2023 Event/Program Plan and provide to the FMHM Board of Directors by 2/15/23

Objective # EPO-A2

Develop the FMHM 2024-2025 Event/Program Plan to the FMHM Chair by 11/30/23

Objective # EPO-A3

Establish the FMHM Events & Program Team, compile team charter, and provide details to the FMHM Board of Directors by 2/28/23

Operations (OP) Focus Area

Goal OP-A

Goal Champion: 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 2023-2027 five-year FMHM Property & Facilities master plan spreadsheet and provide to FMHM Executive Director by 5/31/23

Goal OP-B

Goal Champion: Volunteer Coordination Team Lead

Develop and maintain a robust volunteer program to ensure qualified and adequate individuals are available to provide Front Desk 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 volunteers by 6/30/23.

Objective # OP-B2

Develop and implement a FMHM Volunteer Appreciation Event by 10/31/23

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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.