The 2018 Strategic Plan of the Beaver Island Historical Society

Our Mission
The purpose of the Society is to preserve and share the unique history of Beaver Island and the Archipelago.

Our Vision
The Society will share the unique historical stories of the Archipelago through the renovated and expanded museums.

Our Values
- Community
- Close Interpersonal Relations
- Emphasis on Education
- Knowledge and Expertise
- Quality Exhibits
- Financial Sustainability
- Historic Preservation
- Cultural Diversity
- Traditional Values
- Embrace & appreciate the natural environment

LONG-TERM STRATEGIC GOALS AND OBJECTIVES

SOCIETY GOAL: The Beaver Island Historical Society will be a sustainable and fiscally sound organization responsible for sharing the unique historical stories of the Archipelago.
BOARD GOAL: The Board of Trustees are to perform as a qualified, trusted, and reliable Board who will define the policies and procedures of the Society as well as perform organizational oversight.

STRATEGIC OBJECTIVE: The Board of Trustees are to be a working board that attends monthly board meetings and museum events, assists in Museum operations, and serves on committees of interest.

METHODS

1. Finance Committee will oversee or perform as noted:
   - Budget
   - Financial transactions
   - Tracking
   - Purchase order/work orders
   - Process bills paid – accounts
   - Act as an Investment Committee
   - Review the results of the Audit committee
   - Complete tax forms
   - Update financial profiles

2. Maintenance Committee will oversee or perform as noted:
   - Interior and exterior of all buildings, property, and signage
   - Landscaping – short and long-term plan
   - Regular maintenance and inspection of all buildings

3. Marketing Committee will oversee or perform as noted:
   - Create a brand
   - Publicity for all events
   - Programming for the Museum
   - Marketing Media

4. Museum Operations Committee will oversee or perform as noted:
   - Oral Histories
   - Grants
   - Exhibits
   - Gift Shop
   - Genealogy
   - Archival Management
   - Collections: Maintain accessions or deaccessions for new or current artifacts

5. Development Committee will oversee or perform as noted:
   - Fundraising for specific purposes and projects
   - Membership
   - Board Development
   - Capital Campaign
FINANCE GOAL

The Finance Goal is for the Society to be a fiscally sound organization.

OBJECTIVES

The objective of the Finance Goal is to oversee the daily financial operations of the Society.

METHODS

The methods to achieve the Finance Goal include to periodically update the cash and financial plans; make recommendations and provide oversight of the budget; and validate and keep current all licenses and provide an internal audit of best practices utilizing nonprofit accounting procedures.

EVALUATIONS

The Finance Goal outcomes will be evaluated through an audit conducted by an independent auditor as required by State regulatory laws as well as presenting an overview of the finances at the annual membership meeting. In addition, the committee will review proposed committee budgets and make recommendations annual budget.

MAINTENANCE GOAL

The Maintenance Goal is for the Society to be a good steward of property assets.

OBJECTIVES

The objective to achieve the Maintenance Goal is to review and maintain Heritage Park, Protar House, Maritime Museum, Print Shop Museum, and all future property acquisitions.

METHODS

The methods to achieve the Maintenance Goal include properly caring for maintain Society properties and assets throughout the year. In addition, the Print Shop Addition Sub-Committee will oversee the construction of the Covered Porch Replacement and Print Shop Addition.
EVALUATION

The Maintenance Goal outcomes will be evaluated through conducting and reviewing pre- and post-inspections as well as annually preparing and presenting a projected budget to the Finance Committee.

PRINT SHOP ADDITION CAPITAL GOAL

The new Print Shop Addition will enhance visitor experiences and help carry out the vision of the Beaver Island Historical Society: The Society will share the unique historical stories of the Archipelago through the renovated and expanded museums.

OBJECTIVES

Over the years, the Print Shop Museum condition, including the porch, has deteriorated such that it no longer serves the community adequately. With the construction of a new addition, there will be opportunities to display updated and professionally designed museum exhibits and provide additional outdoor programming, present a construction budget to the Finance Committee for the upcoming fiscal year. The replaced porch will provide a safe entrance to the Print Shop.

METHODS

PHASE 1: Replace the covered porch and possibly remove the kitchen addition. Construction begins on October 1, 2018.

PHASE 2: Perform Pre-Construction Services, such as value engineering and design/build guidance while working with the architect as the Print Shop addition design develops. This activity begins in late 2018.

PHASE 3: Preliminary Plans will be presented to the public in November 2018 after conceptual plans were presented to Society Members at the Annual meeting in August 2018. Construction will begin after Labor Day 2019 (the end of the Museum season, except for September weekends). The completion of the addition will be during the Spring of 2020; the exact date has yet to be determined at the time of this report.

EVALUATION

Completion of phases 1-3 by Spring, 2020, with the project remaining on budget, will determine the success of the project.
DEVELOPMENT GOAL

The Development Goal is to promote increased membership, funding, and board growth.

OBJECTIVES

The objectives of the Development Goal are to maintain a sustainable membership rate at 90% which will raise 25% of projected budget revenue; organize and collaborate in fundraising efforts with the executive director; and prepare and plan professional board development activities for the Society.

METHODS

The methods to achieve the Development Goal include targeting prospective and current members to maintain and improve memberships as well as contacting lapsed members. The method also included identifying and interviewing those interested in becoming Board members; recommending Board membership; and organizing professional board member development activities. Another method includes participating in fundraising development.

EVALUATION

The Development Goal outcomes will be evaluated through reviewing membership and fundraising activities to determine success. A fully functioning Board will demonstrate the successful outcome of the Board development activities. On an annual basis, the committee will present a proposed budget to the finance committee.

MARKETING GOAL

The Marketing Goal is to develop promotional materials for the Beaver Island Museums and Society events.

OBJECTIVES

The objective of the Marketing Goal is to engage the public both on and off the Island by marketing to a variety of venues.

METHODS

The methods used to achieve the Marketing Goal include daily use of social media and Island resources to update activities and maintenance of the Society’s Web site to
provide information and be a source of contact for visitors and residents. The Web site will endorse the collections, programs, and events and be an active voice for promoting the Beaver Island Museums and maintaining its brand.

EVALUATION

The Marketing Goals outcomes will be evaluated through an annual review of promotions and products to determine the effectiveness of marketing for the fiscal year that will result in suggestions for improvements for the following fiscal year. Indicators such as increased attendance at events and visitors to the Museums as well as feedback from people will be used to determine success. On an annual basis, the committee will present a budget to the Finance Committee.

MUSEUM OPERATIONS GOAL

The Museum Operations Goal is to maintain the collections, artifacts, and genealogy archives in a proper manner.

OBJECTIVES

The objectives of the Museums Operations Committee are to plan, prepare, preserve, and execute activities centered on the Society’s mission to preserve and share the unique history of Beaver Island and the Archipelago.

METHODS

The methods used to achieve the Museum Operations Goal include maintaining, preserving, and creating collections, such as oral histories, archival management, exhibits, related island genealogy, gift shop inventory, and accessioning and deaccessioning artifacts.

EVALUATIONS

The Museum Operations Goal outcomes will be evaluated through an annual evaluation of the state of collections, inventory, and recommendations offered for improvements for the following year. On an annual basis, the committee will present a budget to the Finance Committee.