

INTRODUCTION

This long range plan establishes goals and objectives for CCHS over the five years from 2003 to 2008. The plan was developed by CCHS' board and staff beginning in fall 2002 and concluding in late winter 2003. Each board committee developed goals and objectives for their area of interest in collaboration with the staff.

The plan outline broad institutional goals in seven areas: public programs, collections, exhibits, governance, finance, development, and marketing. In each of those areas the broad goals are followed by more specific objectives.

Yearly action plans will be developed to address the goals and objectives by priority, subject to both funding and staffing realities. These annual action plans will provide a mechanism for measuring progress over the five years of this long range plan, and an opportunity to re-evaluate or re-prioritize goals as circumstances warrant.

The overall goals of the plan are:

- The qualitative growth of CCHS' educational mission;
- The development of new and increased support resources to provide for the quantitative growth of that mission; and
- To envision a physical expansion that will enable CCHS to more effectively achieve its mission.

In developing this long range plan CCHS has sought a balance between excellence in achieving the highest standards of institutional programming and operations, and equity in dealing with diversity of audiences we serve.

CCHS Long Range Plan Committee

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MISSION STATEMENT

Chester County Historical Society is a not-for-profit educational institution whose mission is to promote an understanding of the history of Chester County and southeastern Pennsylvania by collecting, preserving, exhibiting and interpreting that history and its relationship to the region and nation beyond to audiences of all ages and interests.

VISION STATEMENT

The History Center of the Chester County Historical Society will be a vibrant place where people may encounter, explore and learn about the past. With diverse audiences and Chester County's unique heritage at its core, CCHS will be an educational leader in the history community of the Delaware Valley.

In pursuit of this vision, Chester County Historical Society will:

1. Identify and collect significant historical materials related to Chester County and southeastern Pennsylvania.
2. Provide leadership in the responsible preservation of, and public access to, these historical materials.
3. Encourage excellence in research, documentation, and interpretation of historical materials.
4. Present exhibitions that use historical materials to enrich the public's understanding and appreciation of the history of Chester County and southeastern Pennsylvania.
5. Foster an appreciation of the importance of historical materials to an understanding of the past and present.
6. Serve diverse audiences through a variety of educational formats.
7. Promote pride in both individual and community heritage.
8. Respond to the community's needs to explore and examine issues critical to its past and their application to contemporary life.
9. Provide support to historic preservation initiatives in Chester County.
10. Maintain and strengthen mutually beneficial relationships and alliances with educational institutions, the business community, government, and other community organizations.

These CCHS Mission and Vision Statements were adopted by the Board of Trustees in January 1997. They are reaffirmed as part of the 2003-2008 Long Range Plan.

GOALS AND OBJECTIVES

Each section of the plan that follows sets forth goals and related objectives. The goals are overarching statements that relate to CCHS' mission and vision statements. The objectives are the specific means this plan uses to achieve those goals.

Each objective has been assessed and assigned a category (A, B, or C), placing it in the context of the resources (both human and financial) available or necessary to meet the objective. In some cases two categories are assigned to a single objective. The categories are as follows:

Category A: Plans, ideas, projects, needs that are part of CCHS' **core** program, supported by the base-level operating budget.

Category B: Plans, ideas, projects, needs that present **opportunities**, but require additional funding and/or additional staff time beyond existing resources.

Category C: Plans, ideas, projects, needs that require **capital** funding to implement.

The plan consists of 119 individual objectives. Those objectives are categorized as follows:

- 86 Category A
- 24 Category B
- 3 Category C
- 3 A/B
- 2 A/C
- 1 A/B/C

I. PUBLIC PROGRAMS

GOAL 1: AUDIENCE DEVELOPMENT – *Attract and serve new and diverse audiences through a comprehensive approach to audience development, while continuing to serve CCHS’ existing audiences. Define “audience development” broadly as diversity in demographics, interests, age, cultural and ethnic backgrounds.*

OBJECTIVE 1 TARGET EXHIBITS, PROGRAMS AND SPECIAL EVENTS TO REACH A VARIETY OF AUDIENCES **A**

STRATEGY

Approach

- Determine audience interests based on surveys, attendance at existing programs, and other measurement means.

Expected Achievements and Dates

- On-going scheduling of family, social history and special interest programs as well as special events.
- On-going partnership with Collections Department on exhibit development.

Resources Required

- Staff time
- Obtain funding as needed

OBJECTIVE 2 DEVELOP MORE PROGRAMMING FOR YOUNG FAMILIES **B**

STRATEGY

Approach

- Determine family programming interests based on surveys and attendance at existing programs, and by assessing programs at similar institutions.
- Re-visit the “Family History” summer camp theme to determine where activities can be improved.
- Create a marketing strategy targeted at families
- Establishment of an informative and engaging series of family programs, including: story-telling, re-enactments, living history, summer camp, and pre-school morning programs.

Expected Achievements and Dates

- Summer camp re-visited over the next year; plans implemented in summer 2004
- Meet with Development Department during summer 2003 to create a marketing strategy
- On-going

Resources Required

- Hire a part-time museum educator in '03 - '04 who would be responsible for summer camp '04.
- Budget \$5,500 for family programming and marketing.
- Grant-writing to raise \$3,000 for summer camp; not including already existing monies from scholarship fund.

OBJECTIVE 3

CONSISTENTLY REVIEW AUDIENCE DATA, AND USE RESULTS TO HELP ESTABLISH PROGRAMMING GOALS A

STRATEGY

Approach

- Conduct a survey of current audiences through exhibit visitors' books, registration materials for special events, and school program conformations
- Partner with the Development Department to review research and develop the database of audiences.

Expected Achievements and Dates

- Meet with Development Department during spring 2004 to create an audience database.
- On-going

Resources Required

- Staff time

OBJECTIVE 4

ESTABLISH ON-GOING PARTNERSHIPS WITH COMMUNITY INSTITUTIONS THAT CAN HELP REACH BROADER AUDIENCES A

STRATEGY

Approach

- Invite local historical organizations to exhibit their collections at CCHS
- Strengthen current outreach programs to community groups, retirement homes, and chambers of commerce
- Attend local chambers of commerce meetings.

Expected Achievements and Dates

- On-going

Resources Required

- Staff time

OBJECTIVE 5

BUILD A STRONGER ALLIANCE WITH THE GENEALOGICAL COMMUNITY A

STRATEGY

Approach

- Offer more genealogical workshops, programs and incentives, specifically a lecture series that would be distinct from the annual genealogical workshop.
- Explore a reciprocal or dual membership between CCHS and the Genealogical Society of Pennsylvania that offers the advantages of membership of both institutions.
- Create a listing of CCHS genealogical resources on the CCHS web page with suggestions on how schools can use them for family history research.

Expected Achievements and Dates

- Establish a genealogical lecture series starting in Fall 2003
- On-going

Resources Required

- Increase the current \$4,000 workshop budget by an additional \$1,000 for the genealogical lecture series.
- Staff time

**OBJECTIVE 6 USE THE WEBSITE TO PROMOTE A DIVERSE AUDIENCE
APPEAL A/B**

STRATEGY

Approach

- Advertise programs that appeal to a wide range of audiences.
- Transfer the school research program materials onto the website and augment it with specific documents and images from the collection.
- Create links to other special interest websites.
- Create a virtual tour of current and past exhibitions.
- Establish a feedback page on the website where visitors can comment of programs and exhibits.

Expected Achievements and Dates

- Student and researcher accessibility to our collections for research purposes.
- Process should begin during the current fiscal year and will be on-going through the next five years.

Resources Required

- Staff time
- Website technical management.

GOAL 2: GENERAL AUDIENCES – *Develop quality educational programs and outreach services to meet the needs and interests of diverse general audiences.*

**OBJECTIVE 1 CONTINUE TO DEVELOP A SCHEDULE OF PROGRAMS IN A
VARIETY OF FORMATS FOCUSING ON QUALITY RATHER
THAN QUANTITY OF OFFERINGS A**

STRATEGY

Approach

- Determine public interests based on surveys.
- Create one or two lecture series each semester on a special topic to balance other workshops, programs and special events.
- Visit / attend workshops, programs, lectures at other area museums.
- Obtain funding as needed.

Expected Achievements and Dates

- Establish a varied schedule of quality programming that meets the needs and interests of CCHS diverse audiences.
- On-going

Resources Required

- Increase the average speaker honoraria from \$100 to \$150, with the understanding that scholars and living history performers will cost even more. Total annual budget for public program speakers should be at least \$7,000.
- Sponsorships or grant writing to augment special events and special lecture series.
- Staff time

**OBJECTIVE 2 COLLABORATE WITH LOCAL COLLEGES AND
UNIVERSITIES TO MAKE CCHS PROGRAMS AND
RESOURCES AVAILABLE FOR COURSES AND PROGRAMS [B]**

STRATEGY

Approach

- Strengthen partnership with West Chester University History Department by securing a adjunct faculty position that would be teaching a course in museum studies.
- Integrate other local colleges into the sponsorship of the annual Fall Conference where appropriate.
- Establish a special student discount on admissions fees based on number of visits.

Expected Achievements and Dates

- Create a teaching history museum where staff pursue professional development by mentoring and teaching.
- Strengthen community ties by making CCHS collections more accessible to local undergraduate communities.
- On-going

Resources Required

- Professional development time contributed by local faculty.
- 10% of the course credit fee per student from any local college or university whose students benefit from a course conducted by CCHS.
- Staff time

**OBJECTIVE 3 INCREASE SCOPE OF CCHS' FACILITIES RENTAL PROGRAM
TO INCLUDE REGIONAL HISTORICAL GROUPS AND
COMMUNITY SERVICE CLUBS AND ORGANIZATIONS [A]**

STRATEGY

Approach

- Identify alumni pools of local residents whose alma mater is out-of-state and promote CCHS as an annual event gathering place.
- Visit / attend programs of local historical groups and service clubs to promote CCHS.

Expected Achievements and Dates

- Establish a regular schedule of rental customers adjust fee according to number of events and frequency of rentals.
- On-going

Resources Required

- Staff time

**OBJECTIVE 4 MAINTAIN OUTREACH TO COMMUNITY ORGANIZATIONS
BY PROVIDING SPEAKERS AND PROGRAMS A**

STRATEGY

Approach

- Collaborate with CCHS members to have our programs, exhibits and special events listed in community organization publications.
- Visit / attend workshops, programs, lectures of community organizations to assess interests and needs.

Expected Achievements and Dates

- Establish a varied schedule of quality programming that meets the needs and interests of community organizations and includes living history performances, slide presentations, and lectures.
- On-going

Resources Required

- Staff time

**OBJECTIVE 5 WORK WITH COMMUNITY ORGANIZATIONS AND
INSTITUTIONS TO DEVELOP COLLABORATIVE PROGRAMS
TO REACH UNDERSERVED AND TARGETED AUDIENCES B**

STRATEGY

Approach

- Determine interests of underserved and targeted groups based on surveys.
- Work with CCHS members who are connected with an underserved group or a special targeted audience.
- Plan incentive days where programming is directed to a specific group and admissions fees are suspended.
- Obtain funding as needed.

Expected Achievements and Dates

- Establish a varied schedule of quality programming that meets the needs and interests of CCHS diverse audiences
- On-going

Resources Required

- Increase program expenses to \$8,000.
- Sponsorships or grant writing to augment special events for underserved audiences
- Staff time

GOAL 3: SCHOOL PROGRAMS AND TEACHER SERVICES – *Offer a comprehensive series of educational programs and services to schools and teachers in Chester and neighboring counties.*

OBJECTIVE 1 EVALUATE AND ENHANCE EXISTING PROGRAMS AS NECESSARY, STRESSING MORE MUSEUM-BASED PROGRAMMING **A**

STRATEGY

Approach

- Develop themes inspired by curricular needs of the schools as well as by local history and CCHS collections.
- Develop interactive components in every program.
- Partner with local school teachers.
- Obtain funding as needed.

Expected Achievements and Dates

- Establish quality educational programs that reach students and teachers in meaningful ways and have a clear and distinct connection to Chester County's rich heritage.
- On-going

Resources Required

Staff time for research and development.

OBJECTIVE 2 ESTABLISH A CCHS COMPONENT WITHIN THE CURRICULA OF EACH OF THE TWELVE PUBLIC SCHOOL DISTRICTS, AND IN PRIVATE, PAROCHIAL, CHARTER, AND HOME SCHOOLS **B**

STRATEGY

Approach

- Consult with social studies coordinators on curricular needs in the public schools.
- Consult with chairs of history departments to ascertain curricular needs in the private and parochial schools.
- Consult with home school service networks.

Expected Achievements and Dates

- Creation of a regular, on-going relationship with Chester County's public, private and parochial schools.
- On-going

Resources Required

- Staff time for research and development.

OBJECTIVE 3 IMPROVE QUALITY CONTROL OF AND FORMALIZE THE TRAINING PROCEDURE FOR THE INTERPRETATION OF EXHIBITS AND PROGRAMMING AMONG VOLUNTEER DOCENTS **A**

STRATEGY

Approach

- Strengthen the orientation program for new Museum Teaching Assistants.
- Update MTA training manuals to include information on most recent exhibits and any new information on permanent exhibits.
- Require attendance at pre-scheduled training sessions.
- Require that every MTA conduct two practice tours with a staff member prior to their first formal school tour.

Expected Achievements and Dates

- Establishment of an interpretive program with accurate and consistent information
- On-going

Resources Required

- Staff time

OBJECTIVE 4 ESTABLISH A REGULAR INTERNSHIP PROGRAM THAT TRAINS GRADUATE AND UNDERGRADUATE STUDENTS IN THE FIELDS OF SOCIAL STUDIES EDUCATION, MUSEUM STUDIES, AND HISTORY [B]

STRATEGY

Approach

- Strengthen partnership with West Chester University History Department by securing a adjunct faculty position that would be teaching a course in museum studies.
- Work with University of Delaware Museum Studies Program, Cooperstown Graduate Program and other professional training programs to develop flow of intern candidates.
- Establish a formal orientation program for student interns

Expected Achievements and Dates

- Create a teaching history museum where staff pursue professional development by mentoring and teaching graduate and undergraduate students.
- On-going

Resources Required

- 10% of the course credit fee per student from any local college or university whose students benefit from a course conducted by CCHS.
- Financial assistance through the Pennsylvania Higher Education Assistance Agency.
- Pay interns at standard professional levels.
- Staff time

OBJECTIVE 5 CULTIVATE PARTNERSHIPS AND GAIN FEEDBACK ON CCHS EDUCATIONAL PROGRAMS AND SERVICES FROM AREA EDUCATORS [A]

STRATEGY

Approach

- Continue CCHS' teacher advisory council on an "as needed" basis for the development of special programs and major exhibits.

- Conduct annual feedback sessions at CCHS from teachers who routinely use our resources.
- Conduct open annual teacher open houses to introduce and orient new teachers to CCHS.

Expected Achievements and Dates

- Establishment of an on-going partnership with local elementary, middle- and high school teachers.
- On-going

Resources Required

- Staff time
- Increase the existing workshop budget by \$1,500 and earmark at least \$1,000 for open houses and feedback sessions.

OBJECTIVE 6 CONTINUE AND EXPAND EDUCATIONAL PARTNERSHIP WITH WEST CHESTER UNIVERSITY A

STRATEGY

Approach

- Establish an adjunct faculty position at the university who would teach a course in museum studies.
- Improve the quality and co-sponsorship of the Annual Fall Conference.
- Establish a special student discount on admissions fees based on number of visits.
- Strengthen the scope and number of schools involved in the History Day competition.

Expected Achievements and Dates

- Create a teaching history museum where staff pursue professional development by mentoring and teaching.
- Strengthen community ties by making CCHS collections more accessible to local undergraduate communities.
- On-going

Resources Required

- Staff time
- Increase History Day budget of \$3,000 annually through a matching contribution by the university.
- Increase Fall conference budget of \$4,000 annually through a matching contribution by the university or an equivalent in-kind contribution.

OBJECTIVE 7 DEVELOP AND PRESENT PROFESSIONAL DEVELOPMENT OPPORTUNITIES FOR EDUCATORS A

STRATEGY

Approach

- Continue existing annual teacher workshops.
- Maintain communication with and monitor the activities and programs of the Pennsylvania Department of Education, and professional organizations like the National Council for Social Studies Education and the National Association of Independent Schools.

- Provide professional development credit through the Commonwealth's ACT 48 program.
- Offer curriculum consultations on an as needed basis to schools.
- Conduct open annual teacher open houses to introduce and orient new teachers to CCHS.

Expected Achievements and Dates

- Establishment of an on-going partnership with local elementary, middle- and high school teachers.
- On-going

Resources Required

- Staff time
- Existing \$4,000 workshop budget.

OBJECTIVE 8 EXPAND HISTORY DAY OUTREACH TO MORE PRIVATE AND PAROCHIAL SCHOOLS IN CHESTER AND NEIGHBORING COUNTIES AND IMPROVE THE QUALITY CONTROL OF THE PROJECTS AND JUDGING [B]

STRATEGY

Approach

- Promote History day among private and parochial schools through faculty meetings.
- Maintain communication with and monitor the activities and programs of the Philadelphia-based National Association of Independent Schools.
- Coordinate judging assignments and quality control between West Chester University staff and CCHS staff.
- Partner with local civic groups to sponsor History Day activities, awards and scholarships.
- Encourage West Chester University to offer a partial scholarship for the best project among local senior students.

Expected Achievements and Dates

- Establishment of an on-going partnership with local private and parochial school teachers.
- Creation of a community-based History Day competition that involves CCHS, WCU, civic organizations and schools.
- On-going

Resources Required

- Staff time: part-time position to coordinate History Day with West Chester University and provide outreach to schools already exists, but needs additional hours.
- Increase the existing History budget by \$3,000 over the next four years by seeking sponsorships from local civic organizations.

GOAL 4: PUBLICATIONS – *Produce and maintain a range of educational programs that will promote a wider interest in CCHS among diverse constituencies.*

OBJECTIVE 1 PLAN, WRITE, AND EDIT A BALANCED SCHEDULE OF PUBLICATIONS TO ACCOMPANY EXHIBITIONS IN

COLLABORATION WITH COLLECTIONS AND DEVELOPMENT DEPARTMENTS [B]

STRATEGY

Approach

- Identify research needs based on the five-year exhibit plan.
- Coordinate a timeline for publications with Collections and Development departments, with an eye on anniversaries.
- Partner with scholars working on collections-related topics.
- Establish a clear policy statement on intellectual property, especially for the duplication of photos from CCHS collections over the internet.
- Obtain funding as needed.

Expected Achievements and Dates

- Establishment of a balanced schedule of quality publications, including catalogs, gallery guides and exhibit brochures, that are registered under a CCHS copyright.
- On-going

Resources Required

- Staff time for research and development.
- Increase publications budget through grant money for major special exhibits, applying for an additional \$20,000 to \$50,000 (depending upon size and run of the exhibit) for a professionally produced catalog.

GOAL 5: STRATEGIC ALLIANCES WITH THE HISTORY

COMMUNITY – *Offer professional support and technical assistance to regional historical organizations and museum professionals in areas of mutual interest and overlapping mission.*

OBJECTIVE 1 CO-SPONSOR EXHIBITS, ACTIVITIES AND EVENTS WITH OTHER REGIONAL HISTORICAL ORGANIZATIONS [B]

STRATEGY

Approach

- Establish a partnership with local living history performers for supplemental programming opportunities.
- Pursue professional development activities by offering outreach to other regional historical organizations.
- Write and publish (under CCHS copyright) curriculum materials to be shared with other regional history museums and organizations.
- Establish a mini-gallery for short-term celebratory, anniversary exhibitions where items are loans by local historical commissions.
- Explore joint membership with smaller historical societies and commissions in Chester County.
- Obtain funding as needed.

Expected Achievements and Dates

- Creation of a cooperative history-based network of institutions that shares resources in order to promote public history and for the benefit of the general public.
- On-going

Resources Required

- Staff time

**OBJECTIVE 2 INFORM AND EDUCATE THE GENERAL PUBLIC ON
PRESERVATION ISSUES [B]**

STRATEGY

Approach

- Develop symposia, workshops, and publications related to preservation issues.
- Partner with local, regional and statewide groups serving the needs of historic preservation, making sure to identify individual responsibilities.
- Obtain funding as needed.

Expected Achievements and Dates

- Establish a limited but effective role in monitoring preservation issues as they arise, especially in Chester County.
- On-going

Resources Required

- Staff time

GOAL 6: TECHNOLOGY – *Select and implement new technologies to serve CCHS’ mission of public outreach.*

OBJECTIVE 1 MAINTAIN AN INTERACTIVE WEBSITE [A/B]

STRATEGY

Approach

- Identify other museum websites that can serve as a model.
- Create a virtual tour of current and past exhibits.
- Offer limited access to collections.
- Provide the ability for schools and civic organizations to schedule tours electronically.
- Maximize media coverage beyond programs, exhibits and events to include public history topics and history-related current events.

Expected Achievements and Dates

- Establish an effective electronic means of communication for staff, members and the general public via a colorful, informative, interactive and engaging website.
- On-going

Resources Required

- Staff time
- Obtain funding as needed
- Technical assistance

**OBJECTIVE 2 MAKE EXHIBITS MORE VISITOR FRIENDLY THROUGH
TECHNOLOGY [B]**

STRATEGY

Approach

- Integrate video viewing room into all special exhibitions.
- Integrate more recent audio-visual technology with traditional interactive components in all special exhibits.

Expected Achievements and Dates

- Establish special exhibits that will make the visitor experience a more personal, self-guided one.
- On-going

Resources Required

- Staff time
- Obtain funding as needed.

II. COLLECTIONS

GOAL 1: COLLECTIONS CARE – *Improve physical condition of collections to ensure long-term preservation and accessibility*

OBJECTIVE 1 CARRYOUT CONSERVATION SURVEYS AND INDIVIDUAL TREATMENTS B

STRATEGY

Approach

- Determine conservation needs based on surveys and condition reports.
- Obtain funding, including that needed for individual object treatment.
- Select qualified conservators and collections care professionals.

Expected Achievements and Dates

- Improved condition of items most at risk of deterioration and most needed for exhibits.
- On-going

Resources Required

- Funds beyond core budget.
- Staff time

OBJECTIVE 2 IMPROVE PHYSICAL CONDITION OF AND ACCESS TO COLLECTIONS.

Museum - Move museum collections out of 1704 barn B/C

STRATEGY

Approach

- Determine level of permanence of new location and how much access to collections is required (is this permanent or temporary).
- Select location for placement of collection.
- Design shelving/housing needs in new location.
- Determine proper and realistic moving needs – types of movers required, need for specialists – following museum standards.
- Develop realistic moving schedule based on closing date.

Expected Achievements and Dates

- Must be completed by December 2003.
- Anticipate vast improvement of environment for items (e.g. ferrous and non-ferrous metals) identified in General Conservation Survey as top priority care needs; ability to locate objects and make them accessible to the public.

Resources Required

- Curator, collections manager, volunteers, additional staff; purchase or rent new location; prepare new location; professional movers; possibly object specialists to consult and/or assist with moving.
- Funds to lease new facility.
- Moving costs estimated at \$30,000.

Library – Conduct general conservation survey of library collection [B]

STRATEGY

Approach

- Work directly with conservation consultant to review library collection.

Expected Achievements and Dates

- A survey report that prioritizes conservation needs, leading to future funding opportunities.
- Completed 2003

Resources

- Library staff, consultant

Library – Develop plan for future of newspaper clippings file [B]

STRATEGY

Approach

- Work with consultant to develop action plan.
- Identify possible formats to which to convert existing paper-based collection.
- Use archival standards and library usage to make decision.
- Implement plan

Expected Achievements and Dates

- Preserve heavily used information that is currently deteriorating at a rapid rate and making it accessible in several formats.
- Plan begins in 2005; work implemented 2006.

Resources Required

- Library staff; outsourcing service to complete the reformatting; additional technology and technology consultant.
- Reading room equipment to access new format.

Archives – Create alternative format for index to wills and administrations [B]

STRATEGY

Approach

- Identify format for duplicating information.
- Select vendor for outsourcing.

Expected Achievements and Dates

- Obtain copies of heavily used records that will provide efficient access to visitors.
- Completed in 2003 or beginning of 2004.

Resources

- Archives staff, outsource vendor, storage supplies, equipment upgrade to read new format.

GOAL 2: COLLECTIONS ACCESS - *Improve collections accessibility with new storage locations, more efficient database management, and publicly accessible finding aids.*

OBJECTIVE 1 IMPROVE CROSS REFERENCING OF INFORMATION ABOUT COLLECTIONS ACROSS LIBRARY, MUSEUM AND PHOTO ARCHIVES **A**

STRATEGY

Approach

- Develop plan for coordinating information.
- Interview other institutions for their procedures.
- Take preliminary steps in library and photo archives toward OPAC creation.
- Determine means by which museum, library and photo archives electronic records can be linked by researchers.

Expected Achievements and Dates

- Produce collections access tool that streamlines research queries and provides greater access to the collections as a whole.
- Plan developed by 2007, implementation 2008.

Resources Required

- Museum, library, photo archives staff time.
- Technical support

OBJECTIVE 2 IMPROVE INTELLECTUAL ACCESS TO COLLECTIONS

Library – Reorganization and development of cemetery records **A**

STRATEGY

Approach

- Identify existing CCHS records and gaps.
- Physically reorganize existing records.
- Locate outside sources for inclusion in project.
- Possibly develop a county-wide community project to complete gaps.

Expected Achievements and Dates

- Final product will be a unique research collection that is in high demand but is currently inefficient because it does not exist as a unified grouping of materials.
- Finding aid.
- Start in 2003; compilation of materials in 2007.

Resources Required

- Librarian, volunteers; recording and storage supplies; photocopying.

Photo Archives – Print the Joseph Thompson collection of negatives **B**

STRATEGY

Approach

- Outsource production of positive prints.

- Develop and implement storage of prints.
- Identify persons pictured.
- Create finding aid and collection statement.

Expected Achievements and Dates

- Make accessible for the first time images that only exist as negatives, which highlight politics in Chester County in the 1950s and 1960s.
- Completed by 2005.

Resources Required

- Photo archivist, volunteer; outsource vendor; storage supplies.

Archives – Ensure smooth transition in reference services at Government Services facility during leadership transition [A]

STRATEGY

Approach

- Continue to develop written guidelines for access to and interpretation of records.
- Continue to train new staff in archival procedures and visitor services.

Expected Achievements and Dates

- Maintain quality service to the public.
- Greatest emphasis in 2003, but both aspects on-going.

Resources Required

- Archives staff

Museum – Continue data entry of object records and photo documentation [A]

STRATEGY

Approach

- Continue data entry of catalog records, focusing on exhibit and research priorities.
- Continue to work with photographers to photodocument the collection in digital and black and white formats; slides as needed for presentations.
- Use completed group information to determine future acquisition and deaccession priorities.

Expected Achievements

- Complete intellectual access to the three-dimensional collection.
- 50 % of collection completed by 2007.

Resources Required

- Museum staff and volunteers, additional staff devoted to this work; additional computer station.

OBJECTIVE 3 CONDUCT CHESTER COUNTY QUILT PROJECT [B]

STRATEGY

Approach

- Conduct county-wide documentation project.

- Select and install storage cabinets and materials for photographs and paper documents.
- Develop strategy for collecting quilters' oral histories.
- Implement transcriptions of interviews.
- Develop and implement publication and exhibit plan.

Expected Achievements and Dates

- First comprehensive research on Chester County quilts available as an archive of information in perpetuity.
- Greater visibility of CCHS in the community.
- Documentation – 2002/2003
- Oral histories – 2003/2004
- Exhibit and publication – 2007

Resources Required

- Museum staff, volunteers, quilt guilds, equipment for recordings; storage supplies; transcription supplies; exhibit installation: exhibit conservation, design, research.

GOAL 3: USE – *Continue to build on methods and tools to use collections as CCHS' central resource for educating the public about the past.*

OBJECTIVE 1 PUBLISH COLLECTIONS INFORMATION

Photo Archives – Chester County Photographers Directory A

STRATEGY

Approach

- Compile existing research notes on Chester County photographers, e.g. bios, backmarks
- Complete information where needed
- Determine feasibility of forms of publication – printed, electronic

Expected Achievements and Dates

- New research guide available in perpetuity that will help researchers and county residents in their photographic research
- Completed by 2006

Resources Required

- Photo archivist staff time; publication costs if in print; possibly photographic and graphic costs for any form

Library, Archives, Photo Archives and Museum – Produce guide to collections A

STRATEGY

Approach

- Develop lists of collections in each area .
- Produce streamlined information available on CCHS' web site and as handouts.

Expected Achievements

- A resource that clarifies researchers' understanding of collections locations to simplify their visits, requests, etc.

- Completed 2004

Resources Required

- Collections staff time

OBJECTIVE 2 DEVELOP AND PRESENT PUBLIC PROGRAMS (e.g. slide presentations, gallery talks) A

Approach

- Identify topics of interest.
- Conduct research and obtain slides or visual aids.

Expected Achievements and Dates

- Greater outreach to the public about Chester County history, collections.
- Greater awareness about CCHS.
- On-going

Resources Required

- Staff time, funds for visual aids

OBJECTIVE 3 CONTINUE TO PROVIDE QUALITY ASSISTANCE TO THE PUBLIC (e.g. genealogy researchers, object collectors) A

Approach

- Ensure sufficient staffing.
- Provide staff training.
- Support professional development

Expected Achievements and Dates

- Quality service that provides optimum visitor experience.
- On-going

Resources Required

- Staff

III. EXHIBITS

GOAL 1: PRESENT EXHIBITS OF DISTINCTION, EXCELLENCE, VARIETY, AND EDUCATIONAL VALUE - *Exhibits are the principle vehicle CCHS uses to reach its audience. Continue a balanced schedule of thematic and object-based interpretive exhibits drawn from CCHS' and other collections. When additional gallery space becomes available, develop permanent exhibits that focus on key Chester County stories.*

OBJECTIVE 1 CONSISTENT WITH NEW GALLERY SPACE, DEVELOP PERMANENT EXHIBITS ABOUT CHESTER COUNTY'S IMPORTANT STORIES C

STRATEGY

Approach

- Develop key themes inspired by local history and CCHS collections, including the Revolutionary era, agricultural heritage and social reform.
- Develop secondary themes, including native Americans and landscape and environmental change.
- Develop interactive components, both hi-tech and manipulatives.
- Interdepartmental teams to collaborate on script, design, related publications and implementation of process.
- Obtain funding as needed.

Expected Achievements and Dates

- Establish quality exhibitions that reach the public in meaningful ways, would serve as a destination point for students, scholars and out-of-town visitors, and have a clear and distinct connection to Chester County's rich heritage.
- On-going

Resources Required

- Staff time for research and development.
- Sponsorships and/or grant writing targeted at major special exhibitions costing \$10,000 or more.

OBJECTIVE 2 CREATE A MINI-THEATER FOR ORIENTATION FILMS C

STRATEGY

Approach

- Visit other museums, historical societies to view their orientation films.
- Conduct research, collect images, and other visual aids.
- Partner with local filmmakers who have experience with educational films, documentaries.

Expected Achievements and Dates

- Creation of a quality, 12-minute orientation film that highlights the collections, programs and resources of CCHS.
- On-going

Resources Required

- Staff time for research and development.
- Sponsorships and/or grant writing.

OBJECTIVE 3

MAINTAIN A FIVE-YEAR EXHIBIT SCHEDULE A

STRATEGY

Approach

- Develop of exhibit topics, scheduling and team development will follow existing “Exhibit Development Guidelines”.
- Conduct research, collect images, and other visual aids.

Expected Achievements and Dates

- Creation of a balanced, five-year schedule of thematic and object-based interpretive exhibits.
- Must be updated each fiscal year.

Resources Required

- Staff time

OBJECTIVE 4

ACCOMPANY EXHIBITS WITH A RANGE OF INTERPRETIVE PROGRAMS A

STRATEGY

Approach

- Identify topics of interest.
- Preview potential programs at other institutions.

Expected Achievements and Dates

- Create a balanced schedule of interpretive programs for each exhibit which includes lectures, living history, gallery talks and special programs.
- On-going

Resources Required

- Staff time
- Programs for major special exhibitions require sponsorship or grant writing for a budget of \$5,000 to \$8,000, depending on the size and run of the exhibit.

OBJECTIVE 5

INTEGRATE INTERACTIVE COMPONENTS FOR SCHOOL AND FAMILY GROUPS IN EVERY EXHIBIT B

STRATEGY

Approach

- Conduct research on high-tech audio-visual aids .
- Visit interactive exhibitions at other museums.

Expected Achievements and Dates

- Ensure that every major exhibit has a balance of high tech, audio-visual aids and educational manipulatives.
- On-going

Resources Required

- Sponsorships and grant writing for a budget of \$25,000 to \$50,000 for interactives in major exhibits.
- Staff time

OBJECTIVE 6

CONTINUE TO DEVELOP NEW HANDS-ON ACTIVITIES IN THE HISTORY LAB B

STRATEGY

Approach

- Identify a range of activities.
- Ensure sufficient funding for the development of new activities and maintenance of existing ones.
- Provide staff training.

Expected Achievements and Dates

- Create an engaging experience for both young and old visitors in this hands-on gallery.
- Ensure the rotation of quality interactives.
- On-going

Resources Required

- Staff time
- Establish a line item of \$5,000 annually in the Public Programs budget for History Lab updates.

OBJECTIVE 7

DEVELOP AND IMPLEMENT EXHIBITS AS TEAM PROJECTS OR INDIVIDUAL ASSIGNMENTS A

STRATEGY

Approach

- Develop themes inspired by local history and/or CCHS collections.
- Develop interactive components, printed materials, design.

Expected Achievements and Dates

- Quality presentations that reach the public in meaningful ways.
- To be determined by the long-term schedule.

Resources Required

- Staff time; research and installation costs; some publication costs.

IV. GOVERNANCE

GOAL 1: GOVERNANCE STRUCTURE - *Ensure that CCHS' governance structure meets organizational needs and reflects best practices for non-profit cultural organizations*

- OBJECTIVE 1** **REVIEW CCHS GOVERNANCE DOCUMENTS (CHARTER, BY-LAWS, PA TAX-EXEMPTION) TO ENSURE THEY MEET CCHS' NEEDS, CURRENT PENNSYLVANIA NON-PROFIT LAW AND TAX-EXEMPTION STANDARDS, EFFECTIVENESS FOR CCHS' OPERATIONS, AND MAKE RECOMMENDATIONS FOR ANY NECESSARY OR DESIRABLE CHANGES** [A]
- OBJECTIVE 2** **REVIEW CCHS' COMMITTEE STRUCTURE, THE ROLE OF BOARD COMMITTEES IN CCHS' CONTEXT, DUTIES DELEGATED TO SPECIFIC COMMITTEES, AND MAKE RECOMMENDATIONS FOR ANY DESIRABLE CHANGES AND IMPROVEMENTS** [A]
- OBJECTIVE 3** **ESTABLISH WRITTEN CONFLICT OF INTEREST POLICIES/CODES OF ETHICS COVERING CCHS TRUSTEES, STAFF, AND VOLUNTEERS** [A]

STRATEGY

Approach:

- Committee to conduct policy reviews and draft conflict of interest/ethics statements.

Expected Achievements and Dates:

- Basic governance review complete by end of 2003
- Committee structure review completed in time for leadership transition July 2004.
- Conflict of interest policy and ethics statement complete by January 2004.

Resources required:

- Legal fees for governance document review, est. \$2,500.
- Staff and committee time.

GOAL 2: GOVERNANCE PERFORMANCE - *Assess the performance of CCHS' board of trustees on a regular basis.*

- OBJECTIVE 1** **ESTABLISH CRITERIA FOR ON-GOING BOARD OF TRUSTEES ON A REGULAR BASIS** [A]
- OBJECTIVE 2** **ENGAGE THE BOARD IN A SELF-ASSESSMENT EXERCISE ON A REGULAR BASIS** [A]

OBJECTIVE 3 **RECOMMEND ANY NECESSARY AND DESIRABLE CHANGES TO BOARD POLICY AND PRACTICE BASED ON COMPLETED BOARD ASSESSMENT** [A]

OBJECTIVE 4 **ESTABLISH BOARD EDUCATION ELEMENTS INTO BOARD AND COMMITTEE MEETINGS ON A REGULAR BASIS.** [A]

OBJECTIVE 5 **FOSTER LINKS BETWEEN CCHS' BOARD AND BOARDS IN CCHS' PEER GROUP.** [A]

STRATEGY

Approach:

- Committee to review various assessment tools, select one, and implement it.
- Develop schedule and topics for board education components in meetings.

Expected Achievements and Dates

- Select assessment tool and conduct first assessment in FY 03/04.
- Develop board education schedule to begin in FY 03/04.

Resources Required

- Staff and committee time

GOAL 3: TRUSTEE SELECTION - *Identify, cultivate, and recruit a pool of potential CCHS trustees.*

OBJECTIVE 1 **ESTABLISH A PROFILE OF AN “IDEAL” CCHS BOARD AND TRUSTEE FOR USE IN EVALUATING POTENTIAL BOARD CANDIDATES** [A]

OBJECTIVE 2 **DEVELOP AND CULTIVATE A POOL OF CANDIDATES AT LEAST EQUAL TO ONE-THIRD OF THE CURRENT BOARD** [A]

OBJECTIVE 3 **DEVELOP WRITTEN EXPECTATIONS FOR TRUSTEE CANDIDATES IN TERMS OF TIME COMMITMENT, FUNDRAISING ROLE, PERSONAL GIVING, ATTENDANCE, AND ORIENTATION** [A]

OBJECTIVE 4 **ENGAGE POTENTIAL TRUSTEES IN THE GOVERNANCE PROCESS THROUGH COMMITTEE SERVICE AND OTHER CCHS ACTIVITIES** [A]

OBJECTIVE 5 **ADDRESS THE CONTINUING NEED FOR DIVERSITY ON THE BOARD (RACE/ETHNICITY, AGE, GENDER, GEOGRAPHY)** [A]

OBJECTIVE 6 **REVIEW PROCEDURES AND PRACTICES FOR THE BOARD ELECTION PROCESS, AND MAKE ANY DESIRABLE CHANGES** [A]

**OBJECTIVE 7 DEVELOP A MENTORING SYSTEM FOR NEW TRUSTEES AND
NON-TRUSTEES SERVING ON BOARD COMMITTEES [A]**

STRATEGY

Approach:

- Committee to work on all objectives with appropriate staff support.

Expected achievements and dates:

- Committee to work on all objectives through 2003, with new procedures in place for nominations/elections of trustees in spring 2004.

Resources Required:

- Committee and staff time.

V. FINANCE

GOAL 1: REVENUE STREAM - *Stabilize and grow CCHS' revenue stream so that investment, earned income and contributed revenue are each approximately one-third of overall revenue.*

- OBJECTIVE 1** INCREASE ENDOWMENT BY MAJOR GIFTS SOLICITATION, PLANNED GIVING, CAPITAL CAMPAIGN AND BY MARKETING ENDOWMENT OPPORTUNITIES FOR SPECIFIC NEEDS (SCHOOL PROGRAMS, EXHIBITS, ETC.) A/C
- OBJECTIVE 2** CONTINUE TO REDUCE AGGREGATE ENDOWMENT DRAW UNTIL IT REACHES 5% BASED ON A THREE-YEAR RUNNING AVERAGE OF MARKET VALUE A
- OBJECTIVE 3** EVALUATE ALL EXISTING AND PROPOSED (PRE-RECOMMENDATION) CCHS EVENTS AND REVENUE-PRODUCING ACTIVITIES TO IDENTIFY WAYS TO REDUCE COSTS AND RAISE REVENUE, AND TO ENSURE THEY ARE CONSISTENT WITH REVENUE STREAM GOALS AND CCHS' MISSION A
- OBJECTIVE 4** INCREASE REVENUE FROM CONTRIBUTIONS THROUGH EXPANDED MEMBERSHIP BASE AND NEW EFFORTS TO ACHIEVE GIFTS AND GRANTS A

STRATEGY

Approach:

- Committee to work with and support Development Committee and Development Staff on fundraising activities to achieve goals.
- Committee conduct special event review.
- Reach 5% draw rate by '05 – '06.

Expected Achievements and Dates:

- Endowment development on-going.
- Special events review completed in 2003, prior to any CCHS commitment to an additional major fundraising event.

Resources Required:

- Capital funds for endowment additions.
- Committee and staff time.

GOAL 2: OPERATING BUDGET - *Develop CCHS' annual operating budget on revenue assumptions that consider and reflect the previous year's performance.*

- OBJECTIVE 1** PRESENT PRELIMINARY NEW FISCAL YEAR BUDGET AT APRIL BOARD MEETING EACH YEAR A

STRATEGY

Approach:

- Reconfigure schedule for budget preparation.

Expected achievements and Dates:

- Implement new budget timetable in FY 03/04, effective with budget for FY 04/05.

Resources:

- Committee and staff time.

GOAL 3: CAPITAL RESERVE - *Develop a capital reserve for major maintenance needs.*

OBJECTIVE 1 DEVELOP CAPITAL RESERVE BUDGET [C]

STRATEGY

Approach:

- Develop criteria, funding level, etc. for capital budget and maintenance reserve.
- Fund initial reserve by designating a future unrestricted bequest and add to reserve via an endowment campaign.
- Develop policy for use of reserve funds.

Expected achievements and dates:

- Implement new plan (consistent with funds available) in FY 03/04.

Resources:

- Capital funding will need to be in place to fully realize this goal.
- Committee and staff time.

GOAL 4: DEBT - *Reduce and eliminate long term debt.*

OBJECTIVE 1 CONTINUE TO REDUCE EXISTING DEBT VIA BEQUESTS OR SPECIAL FUND RAISING INITIATIVES [B]

OBJECTIVE 2 DEVELOP NEW GUIDELINES FOR AND MONITOR CASH-FLOW BORROWING [A]

OBJECTIVE 3 ESTABLISH CLEAR POLICY ON BORROWING OF DESIGNATED FUNDS VS. LINE OF CREDIT FOR CASH FLOW NEEDS [A]

OBJECTIVE 4 RE-EXAMINE CASH FLOW LINE OF CREDIT NEEDS ANNUALLY [A]

STRATEGY

Approach:

- Committee to review and develop policies related to goals and objectives.

Expected achievements and dates:

- Initiate and complete policy review in fall 2003.
- Reduction of debt contingent on capital funding resources.

Resources Required:

- Utilize bequests to reduce debt
- Committee and staff time.

GOAL 5: PURCHASING PRACTICES – Review and revise purchasing policies.

OBJECTIVE FORMALIZE POLICIES ON COMPETITIVE BIDDING FOR GOODS AND SERVICES [A]

STRATEGY

Approach:

- Conduct review of current CCHS policies on competitive bidding.
- Develop new norms, policies and procedures.

Expected achievements and dates:

- New policies in place for FY 2003/04.

Resources Required:

- Staff and committee time.

VI. DEVELOPMENT

GOAL 1: HERITAGE FUND - *Grow CCHS' Heritage Fund both in funds received and the number of donors.*

- OBJECTIVE 1** **GROW HERITAGE FUND RECEIPTS BY 5% PER YEAR** [A]
- OBJECTIVE 2** **GROW FOUNDERS SOCIETY DONORS SO THAT THEY PROVIDE 50%+ OF HERITAGE FUND RECEIPTS; ESTABLISH DESIRED GROWTH RATE OF FOUNDERS' GIFTS** [A]
- OBJECTIVE 3** **CONSISTENT STEWARDSHIP EFFORTS WITH CURRENT NON-FOUNDERS LEVEL DONORS WITH CAPACITY TO BECOME FOUNDERS** [A]
- OBJECTIVE 4** **MANAGE HERITAGE FUND SOLICITATIONS AS A MINI-CAMPAIGN WITH SIGNIFICANT BOARD AND VOLUNTEER INVOLVEMENT IN CULTIVATION AND SOLICITATION** [A]
- OBJECTIVE 5** **ENLARGE PHONATHON COMPONENT OF HERITAGE FUND** [A]

STRATEGY

Approach:

- Director of Development responsible for Founders' group prospects
- Director of Marketing/PR responsible for balance of Heritage Fund
- Heritage Fund schedule takes precedence over other development mailings.
- No less than three mail contacts as part of Heritage Fund campaign, more selective approach to telethon contacts.

Expected Achievements and Dates:

- Heritage Fund schedule on-going.
- Heritage Fund growth to \$175,000 by FY 07/08.

Resources Required

- Staff time
- Board volunteers for assistance with Founders solicitations and follow up.
- Volunteers (board and others) to conduct telethon each May.

GOAL 2: MEMBERSHIP - *Grow CCHS' membership consistent with the growth rate of Chester County*

- OBJECTIVE 1** **INCREASE NET NEW MEMBERSHIP UNITS AT THE RATE OF 100 PER YEAR** [A]
- OBJECTIVE 2** **UTILIZE MEMBERSHIP AS THE CORE OF CCHS' MARKETING EFFORTS** [A]

- OBJECTIVE 3 UTILIZE DIRECT MAIL VENDORS FOR PERIODIC MEMBERSHIP ACQUISITION CAMPAIGNS** A
- OBJECTIVE 4 INCREASE NUMBER OF ANNUAL NEW MEMBER EVENTS TO ASSIST IN FIRST AND SECOND YEAR MEMBER RETENTION** A
- OBJECTIVE 5 VIA A VOLUNTEER EFFORT, MAKE PERSONAL CONTACT WITH EACH CCHS MEMBER BI-ANNUALLY** A

STRATEGY

Approach:

- Rigorous adherence to membership mailing/renewal schedule.
- Promote membership at all CCHS events, programs, and functions. Develop protocol for when membership recruitment is active or passive depending on program or event.
- In conjunction with marketing efforts, conduct membership satisfaction survey, evaluate results, initiate/follow-through on recommendations.
- Utilize incentives, discounts, members get members, etc. approaches to new members.

Expected Achievements and Dates

- Determine CCHS average member retention rate, then work to improve rate by at least 1% per year.
- Initiate personal contact program fall 2003.
- Direct mail membership efforts ongoing, subject to funding.

Resources required

- Staff time
- Volunteer support for membership contact program
- Budget resources for direct mail campaign; approximately \$.70 per name for mailings of 15,000 or more.

GOAL 3: ENDOWMENT - *Increase endowment so it provides one-third or more of CCHS' operating revenue.*

- OBJECTIVE 1 ADD TO ENDOWMENT VIA MAJOR GIFTS SOLICITATIONS, PLANNED GIVING, AND A CAPITAL CAMPAIGN** A/C
- OBJECTIVE 2 MARKET ENDOWMENT OPPORTUNITIES FOR SPECIFIC CCHS NEEDS (E.G. SCHOOL PROGRAMS, EXHIBITS, ETC.)** A

STRATEGY

Approach:

- Utilize all CCHS publications to highlight endowment needs, past endowment gifts.
- Endowment additions will be a major part of any CCHS capital campaign.
- Develop comprehensive list of specific endowment possibilities for use with donors.
- Planned giving gifts will be designated for endowment, unless donor directs to other purposes.

Expected Achievements and Dates

- On-going, dependent on campaign schedule.

Resources Required

- Staff time
- Board volunteers to assist with cultivation and solicitation.

GOAL 4: PLANNED GIVING - *Establish, market, and grow a CCHS planned giving program to increase endowment.*

- | | |
|--------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| OBJECTIVE 1 | ESTABLISH A BOARD PLANNED GIVING COMMITTEE TO WORK WITH THE DEVELOPMENT OFFICE [A] |
| OBJECTIVE 2 | INITIATE A CHARITABLE GIFT ANNUITY PROGRAM AND MARKET THE PROGRAM TO TARGETED DONORS IN CCHS' MEMBERSHIP [B] |
| OBJECTIVE 3 | IDENTIFY AND PREPARE RELATIONSHIPS WITH THIRD-PARTY PROVIDER FOR PLANNED GIFT VEHICLES SUCH AS CRTS, CRUTS, ETC. [A] |
| OBJECTIVE 4 | DEVELOP AND PRESENT EDUCATIONAL PROGRAMS ON ESTATE PLANNING AND CHARITABLE GIFTS ON A REGULAR BASIS FOR APPROPRIATE SEGMENTS OF THE CCHS CONSTITUENCY [B] |
| OBJECTIVE 5 | IMPLEMENT A COMPREHENSIVE INFORMATION EFFORT ON PLANNED GIVING UTILIZING CCHS' NEWSLETTER, SPECIAL MAILINGS, ETC. TO THE TARGET SEGMENT OF CCHS' CONSTITUENCY [B] |

STRATEGY

Approach:

- Develop planned giving mailings, information sessions, mailings, and publications aimed at CCHS members in appropriate demographic categories.
- Utilize all CCHS publications to highlight planned giving opportunities.

Expected Achievements and Dates

- Board approval of planned giving vehicles CCHS will accept, spring 2003.
- First planned giving information sessions in late spring 2003.

Resources Required

- Staff time
- Board volunteers for planned giving cultivation and solicitation.
- Annual costs for planned giving program estimated to be \$10,000 - \$15,000 annually, when program fully operational.

GOAL 5: BENCHMARK DEVELOPMENT PERFORMANCE - *Benchmark CCHS' progress in development activities with a peer group of similar organizations.*

OBJECTIVE 1 **ESTABLISH A DEVELOPMENT PEER GROUP AND GATHER COMPARATIVE DATA** [A]

OBJECTIVE 2 **UTILIZE DATA TO ANALYZE EFFECTIVENESS OF CCHS' DEVELOPMENT EFFORTS** [A]

OBJECTIVE 3 **SHARE COMMON DATA WITHIN PEER GROUP** [A]

STRATEGIES

Approach

- Gather, assess, publish information from four other peer group institutions.

Expected Achievements and Dates

- Benchmarking process will be completed late winter 2003; annual follow-up thereafter.

Resources Required

- Consultant to conduct survey and annual follow-up
- Staff time

GOAL 6: FUNDRAISING EVENTS - *Ensure continued viability and growth of CCHS fundraising events.*

OBJECTIVE 1 **REVIEW EACH REVENUE PRODUCING EVENT FOR WAYS TO INCREASE REVENUE AND REDUCE/CONTAIN EXPENSE** [A]

OBJECTIVE 2 **IDENTIFY POTENTIAL THIRD FUNDRAISING EVENT (\$50,000+ NET)** [A]

OBJECTIVE 3 **WORK WITH EACH EVENT COMMITTEE TO DEVELOP A RECRUITMENT PLAN FOR NEW COMMITTEE MEMBERS AND A SUCCESSION PLAN FOR LONG TERM LEADERSHIP STABILITY** [A]

OBJECTIVE 4 **SEEK TRADE MARK/SERVICE MARK PROTECTION FOR THE ANTIQUES SHOW TO PROTECT OWNERSHIP OF THE NAME** [A]

OBJECTIVE 5 **DEVELOP A SCHEDULE AND REVIEW CRITERIA FOR THE FOUNDERS AWARD** [A]

STRATEGY

Approach:

- Development Committee to establish criteria for new event, and leadership stability plans.
- Development Committee to work on Founders Award issues.
- Staff to work with events committees on revenue growth and cost containment.

Expected Achievements and Dates:

- New event identified no later than spring 2004, to be held in 2005.
- File for trademark protection for antiques show in 2003, subject to cost.

Resources Required:

- Staff time
- Development committee time.
- Legal representation for trademark filing.

GOAL 7: CORPORATE PARTNERS - *Grow corporate giving in all areas with special attention to recognition of corporate partners.*

- | | |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| OBJECTIVE 1 | REVIEW CORPORATE ASSOCIATES MEMBERSHIP PROGRAM AND CONSIDER ALTERNATIVES [A] |
| OBJECTIVE 2 | REVIEW CORPORATE UNDERWRITING/SPONSORSHIP OPPORTUNITIES WITH CCHS EVENTS AND SELECTED EXHIBITS AND DEVELOP NEW WAYS TO INFORM THE CORPORATE COMMUNITY OF THESE OPPORTUNITIES [A] |
| OBJECTIVE 3 | HOLD REGULAR CORPORATE STEWARDSHIP EVENTS AT CCHS [A] |
| OBJECTIVE 4 | BETTER COORDINATE CORPORATE SOLICITATIONS THROUGH THE DEVELOPMENT OFFICE [A] |
| OBJECTIVE 5 | IDENTIFY AND CULTIVATE POTENTIAL SUCCESSORS TO EACH OF CCHS MAJOR CORPORATE SPONSORS [A] |
| OBJECTIVE 6 | INSTITUTE A BI-ANNUAL REVIEW OF SPONSORSHIP BENEFITS [A] |

STRATEGY

Approach:

- Ad hoc committee of board and corporate partners to work with development staff to review and refine program.

Expected Achievements and Dates

- Ad hoc committee appointed spring 2003, report back with recommendations Fall 2003.
- Implementation on-going.

Resources Required:

- Staff time
- Volunteer time of ad hoc committee.

GOAL 8: CAPITAL CAMPAIGN - *Plan and conduct a capital campaign in support of raising endowment and potential physical plant expansion.*

- OBJECTIVE 1** **BASED ON EXISTING FEASIBILITY STUDY MOVE FORWARD WITH CULTIVATION EVENTS WITH POTENTIAL DONORS.** [A]
- OBJECTIVE 2** **SOLICIT SELECTED DONORS BASED ON THEIR READINESS TO GIVE.** [A]
- OBJECTIVE 3** **DEVELOP CASE MATERIALS FOR PHYSICAL EXPANSION COMPONENT AS SOON AS POTENTIAL SITES ARE RESOLVED.** [A]
- OBJECTIVE 4** **CULTIVATE AND SELECT APPROPRIATE VOLUNTEER LEADERSHIP FOR DIFFERENT ELEMENTS OF A CAMPAIGN.** [A]

STRATEGY

Approach:

- Begin major gift solicitation with selected donors in 2003.
- Utilize challenge campaign (anonymous challenge gift in-hand) as incentive in solicitations.
- As soon as physical expansion component clarifies, move quickly to a more formal campaign environment.
- Develop campaign materials, case statement, publications, etc.

Expected Achievements and Dates

- Contingent on physical expansion component in place
- At least two capital campaign cultivation events in 2003.

Resources required

- Staff time
- Board volunteers for cultivation and solicitation.
- Capital campaign costs will be in the range of 6% of goal, e.g. \$7 million goal = \$420,000 cost.

GOAL 9: DONOR STEWARDSHIP - *Focus on and improve CCHS' donor stewardship practices.*

- OBJECTIVE 1** **REVIEW AND ASSESS ALL CURRENT STEWARDSHIP PRACTICES AND ACTIVITIES AT THE BOARD AND STAFF LEVEL.** [A]
- OBJECTIVE 2** **DEVELOP RECOMMENDATIONS FOR STEWARDSHIP IMPROVEMENT, INCLUDING DONOR RECOGNITION.** [A]

- OBJECTIVE 3** **IMPROVE BOARD AND STAFF AWARENESS OF THEIR RESPECTIVE ROLES AND OPPORTUNITIES IN DONOR STEWARDSHIP. [A]**
- OBJECTIVE 4** **PUT A HIGH PRIORITY ON CARING AND CONSISTENT STEWARDSHIP OF CCHS' VOLUNTEERS. [A]**
- OBJECTIVE 5** **MAKE EVERY DONOR AND VOLUNTEER FEEL VALUED, APPRECIATED, AND RESPECTED FOR WHAT THEY DO FOR CCHS. [A]**

STRATEGY

Approach:

- Development Committee to undertake stewardship review throughout 2003, with recommendations for improvements by early 2004.

Expected Achievements and Dates

- Enhanced stewardship program in place in early 2004.

Resources Required

- Staff time
- Development committee time.

VII. MARKETING

GOAL 1: PUBLIC AWARENESS - *Increase awareness of CCHS both within the Chester County community and beyond, with the aim of increasing attendance at CCHS, its programs, and its special events.*

OBJECTIVE 1 MAXIMIZE MEDIA COVERAGE FOR CCHS ABOVE AND BEYOND PROGRAMS, EXHIBITS, AND EVENTS. [A]

STRATEGY

Approach

- Regularly seek staff input for stories that can keep CCHS in the news.
- Develop a comprehensive list of unique and intriguing “news stories” that are not time sensitive (eg, CCHS has the oldest known American-made sundial in its collection;). This list, both in print and electronic format, can be used to pitch stories to the media.
- Expand media database.

Expected Achievements and Dates

- On-going.

Resources required

- Marketing Manager’s time, including ongoing input from entire staff.

OBJECTIVE 2 PURSUE GROUP TOUR MARKET. [B]

STRATEGY

Approach

- Attend regional tour association trade shows with regional CVBs.
- Advertise in appropriate tour operator publications.
- Create database of group tour operators.
- Establish semi-annual newsletter to send to group tour operators.

Expected Achievements and Dates

- Create database of group tour operators by September 2003.
- Establish quarterly mailings to tour operators in FY 2003-04.

Resources required

- Staffing at trade shows by Marketing Manager.
- Cost to participate in four trade shows annually (American Bus Association, Pennsylvania Bus, Student Youth Travel Association, Maryland Motorcoach, etc.): \$4,000. Travel expenses annually: \$1,500.
- Production/postage of quarterly group tour newsletter: \$500.
- Group tour advertising costs: \$3500.

OBJECTIVE 3 PURSUE CORPORATE RELATIONSHIPS VIA EMPLOYEE SERVICES GROUPS AND OTHER AVENUES. [B]

STRATEGY

Approach

- Make appropriate contacts with regional businesses and increase CCHS' awareness within these businesses.
- Develop corporate merchandizing program for Museum Shop.

Expected Achievements and Dates

- Increase CCHS awareness within regional businesses: on-going.
- Corporate merchandizing program in place by Spring 2004.

Resources required

- Development staff time to increase awareness with businesses.
- Museum Shop Manager staff time to develop corporate merchandizing program. Increased shop volunteers to give shop manager time necessary to pursue this project. Possible need of additional shop staff as program expands. Marketing Manager time to market program. Small space needed in building to create corporate gift packages.
- Corporate Merchandizing Program start-up costs: \$1000 / advertising; \$1000 / initial bulk product costs.

OBJECTIVE 4 ESTABLISH AN EFFECTIVE PLAN TO PROMOTE CCHS TO FAMILIES AND CHILDREN. [B]

STRATEGY

Approach

- Development staff input on public programs that are appealing to families with children; development staff input on exhibit planning.
- Advertising to families.
- See OBJECTIVE 5.

Expected Achievements and Dates

- On-going.

Resources required

- Development staff time.
- Advertising: \$5000 annually for image development.

OBJECTIVE 5 ESTABLISH A BASELINE UNDERSTANDING OF THE MARKET CCHS IS SEEKING TO REACH BY COLLECTING DATA FROM MARKETING STUDIES AND OTHER APPROPRIATE SOURCES. [B]

STRATEGY

Approach

- Acquire outside assistance to administer a comprehensive marketing study of CCHS.
- Create a thorough statistical resource relevant to CCHS of county demographics, etc.; update annually.

Expected Achievements and Dates

- Complete marketing study by December 2004.

Resources required

- Funding for marketing study: \$30,000.

OBJECTIVE 6 ESTABLISH ONGOING RELATIONSHIPS AND PARTNERSHIPS WITH INTERESTED GROUPS WITHIN THE COUNTY. [A]

STRATEGY

Approach

- Develop a more tangible relationships with historical commissions and local preservation societies.

Expected Achievements and Dates

- FY 2003-2004.

Resources required

- Development staff time.

GOAL 2: CCHS MEMBERSHIP - Utilize membership as CCHS' core marketing building block by translating visitors, county residents, interested individuals, and other target markets into CCHS members.

OBJECTIVE 1 INCREASE MEMBERSHIP REVENUE BY 5% EACH YEAR BY NETTING 100 NEW MEMBERS ANNUALLY. [A]

STRATEGY

Approach

- Design a comprehensive outreach program to reach new residents in the county.
- Establish relationships with county real estate agents to promote CCHS.
- Promote CCHS Gift Memberships.
- Produce a new and appealing membership brochure.
- Display the traveling CCHS exhibit throughout the county as a membership development tool.
- Capture names of all visitors to CCHS and all attendees at CCHS events. Promote ongoing relationship by contacting non-members after a CCHS visit, asking them to join.

Expected Achievements and Dates

- FY 2003-2004.

Resources required

- Development staff time.
- New membership brochure: \$8000.

OBJECTIVE 2 RAISE CCHS MEMBER RETENTION RATE. [A]

STRATEGY

Approach

- Identify target retention rate, improve retention rate by 1% per year through 2008.
- Establish quarterly incentive-based appeal for lapsed members.
- Evaluate member benefits to ensure they are enticing and effective.

Expected Achievements and Dates

- FY 2003-2004.

Resources required

- Development staff time.
- Incentive costs estimate: \$1,000 – 2,000 per year.