

## **Executive Summary**

Formed in 1981 under the guidance of the Pennsylvania Historical and Museum Commission, Erie Yesterday was to be the means through which the Erie County heritage community could work collaboratively. While we have grown into a respected source for networking and shared services, the organization remains an underutilized resource. Strategic planning was initiated to help the volunteer-managed organization pursue its mission in a focused, goal-oriented manner.

Our plan is based on input collected from member agencies, community leadership, friends of the heritage community, educators and museum visitors. Our plan establishes Erie Yesterday as a community-based, member-driven organization.

Together, we have defined three supporting strategic goals with priorities, and created the organization's first mission and vision statements. The three strategic goals for Erie Yesterday are 1) to improve the visibility of Erie Yesterday in the Erie County community (externally) and within the membership (internally), 2) to develop county-wide educational initiatives to reach students, adults, and teachers, and 3) to build sustainability plans and programs benefiting Erie Yesterday member agencies and groups.

## **Authorization**

The individuals below approve the contents of the Erie Yesterday Strategic Plan and support the implementation of the plan.

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Rodney Blystone, President, Executive Committee

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Melinda Meyer, Vice President, Executive Committee

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Charles Wagner, Treasurer, Executive Committee

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Linda Waha, Secretary, Executive Committee

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## Strategic Planning Methodology

Late in 2010 the Executive Officers of Erie Yesterday initiated discussions with consultant and museum professional Joni Blackman, Executive Director of the Fenton History Center in Jamestown, NY, concerning development of a three to five-year strategic plan with the intent to improve the self-sufficiency and effectiveness of Erie Yesterday. The plan was to address several administrative concerns and produce the following results.

- Regardless of changes in leadership, Erie Yesterday's strategic plan will guide decision-making and define current and future goals and priorities.
- A strategic plan which facilitates efficient resource and capabilities management will improve the organization's fiscal and project planning. Long-term, this will allow Erie Yesterday to better utilize funding opportunities, and to increase community partnerships and programming for the benefit of its member agencies.
- Erie Yesterday will increase its capacity to adopt a cooperative program to promote Erie County history, historic sites and museums within and beyond the county.
- As a result of the process, Erie Yesterday will be able improve the efficiency and effectiveness of decision-making and move toward becoming an organization capable of exceeding the needs of its member agencies.

Beginning in March 2011 and concluding in May, Ms. Blackman facilitated four strategic planning sessions to discuss and establish the components of the plan. The sessions included a five-hour mission statement and vision statement, a three-hour discussion of the organization's strengths, weaknesses, opportunities and threats (see Table 1.1), a discussion of objectives and goals, and a three-hour session to determine action steps and accountability.

Erie Yesterday's stakeholders, which included member agencies, school teachers, municipal government, college professors, and non-member heritage groups, were invited to share their insights for the initial mission and vision statement retreat. A one-page worksheet was used to assist stakeholders in collecting their thoughts about the value and goals of the organization. Seven worksheets/comments were returned, and a group of 12 met to complete the mission and vision statement workshop.

As mentioned previously, three more planning sessions were held over four weeks. Session participants included the Executive Committee and 3-5 interested community volunteers. This core group held a final meeting to review and refine the goals and objectives and to fine-tune the implementation plan.

While a small group of Erie Yesterday members were involved in the process, they were the knowledgeable community members that knew the history of the organization and had a vision for its

future. The process was a thorough, pragmatic examination of the group's purpose and vision with thoughtful scrutiny about how to move forward over the next three years.

## **Current Situation**

### **Who is Erie Yesterday? (Organization Description)**

In 1981, under the direction of the Pennsylvania Historical and Museum Commission, several heritage groups and organizations in Erie County came together to create Erie Yesterday. Erie Yesterday (EY) is a consortium of historically related organizations which was created with the purpose to promote an awareness of the history, historic sites and museums of Erie County, provide a unified voice for the heritage community and provide a cooperative public relations program.

Current consortium members include the Erie Maritime Museum/ Flagship Niagara League, Erie County Historical Society, Harborcreek Area Historical Society, North East Area Historical Society, Union City Museum, Hornby School Restoration Society, Erie Art Museum, Corry Area Historical Society, Lake Shore Railway Museum, Museum of GE History, Lawrence Park Historical Society, Wattsburg Area Historical Society, Valley School Museum, Fairview Area Historical Society, Asbury Woods Nature Center, Edinboro Area Historical Society, Erie Society for Genealogical Society, Judson House/ Fort LeBeouf Historical Society, West County Historical Association/ Hazel Kibler Museum, Fire Fighters Historical Museum, Goodell Gardens and Homestead, Hurry Hill Farm and Maple Syrup Museum.

**What has Erie Yesterday done?** The organization fulfills its purpose through a number of activities and projects. The DiscoverERIE Passport project, which was supported in part by The Erie Community Foundation and Highmark Blue Cross Blue Shield, and History Quest summer camp (in partnership with Penn State Behrend's College for Kids program) are examples of the organization's collaborative efforts.

With a \$4,500 grant from the Nonprofit Partnership EY hosted two capacity-building workshops in 2009, "Volunteer Recruitment and Training for Small Non-Profits" and "Marketing Your Small Museum." In June 2010, EY, in partnership with the Erie Maritime Museum, brought The Pennsylvania State Archives workshop "Archives Without Tears" to northwestern Pennsylvania. The two-day workshop provided basic information about archives, record management, disaster planning for historical and vital records, and photographs and special media care.

Most recently, EY received funding from ArtsErie in the amount of \$1,500 to be used to complete a strategic plan. As a result of the process, which concluded in May 2011, EY will be better equipped to fulfill its purpose.

**Why does Erie Yesterday do what it does?** Erie Yesterday's member organizations encourage the public to study local history. They collect, safeguard and make accessible artifacts, documents, photographs and oral histories, which they hold in trust for the community; and are ideal learning environments, whether it is formal or informal learning, active hands-on participation or passive observation. And, in studying the community's story the public gains access to and an understanding of the forces that affect their lives, and emerges with an enhanced capacity for informed citizenship, critical thinking and simple awareness. The end result is a healthy respect for oneself and the community.

### **Where is Erie Yesterday now?**

The historical organizations that Erie Yesterday serves face several challenges in the 2011 environment, and although the small museum is a significant force helping to anchor the cultural life of communities across the country, the resources they need are not always available. (All but four of Erie Yesterday's member agencies are classified as small museums. "Small" museums maintain operating budgets under \$250,000.)

Small museums are often managed by individuals who are "passionate," "knowledgeable" and "dedicated," but are less often managed by volunteers who are familiar with museum best practices. To assist museums with collection maintenance, exhibition of collections and programming, the American Association of Museums has developed national standards for the industry through extensive research of the field. These voluntary national standards and best practices are benchmarks against which museums measure their own performance. They also help policy makers, media, philanthropic organizations, donors and members of the public to assess museums' achievements.

Many small museums are administered by a core group of volunteers. These dedicated groups of individuals are slowly aging, and they are overwhelmed with the difficulty of recruiting new volunteers to succeed them. They are in need of re-inventing their image in the community, identifying potential volunteer pools, and developing ways to recruit skilled volunteers.

All but five Erie Yesterday member agencies occupy historic structures. These small museums are charged with preserving Erie County's architectural, social and industrial heritage with limited financial resources and training. Frank E. Sanchis, III, Vice President, Stewardship of Historic Sites, National Trust for Historic Preservation, wrote in his article *Looking Back or Looking Forward? House Museums in the 21st Century* "House museums must acquire planning skills, for without them the intelligent expenditure of funds, however meager, cannot occur. Historic structure and landscape reports, furnishing plans, collections conservation plans, interpretive plans, and based on all of them, master plans, are essential planning documents that must be produced to create a vision and a path to achieve it. Without them, it is next to impossible to develop rational preservation plans or to assure that funds will be allocated for educational programming."

In a *Museum News* article dated March/April 2002, museum director Ron Chew addressed what small museums across the country need not simply to survive, but to thrive. His article is as relevant now as it was nine years ago. “First we need to properly value their existence...Second, we should find ways to make it possible for them to participate at museum conferences, including the American Association of Museums annual meeting, opening the door to greater cooperation between large and small institutions. Third, we need to recognize the particular needs of small museums. Small museums cry out for a set of simple, basic professional standards tailored to their functional needs. Fourth, the funding community needs to allocate greater resources to support their survival. If small museums are caring for the majority of this nation’s artifacts, there must be a way to make more grants and technical expertise available to support their work.”

With the environment continually changing, it may or may not be appropriate for the Erie Yesterday to operate under the original by-laws and within the original purpose statement. As detailed previously, Erie Yesterday’s member agencies face many challenges. The organization addresses these challenges through a purpose statement, policies and procedures that are nearly thirty years old. It is time for Erie Yesterday to examine its foundation to make sure it is relevant to the people and organizations it serves.

Leadership currently engages in minimal planning. Erie Yesterday takes a reactive approach to planning, making programming and event decisions throughout the year. Being proactive, and identifying and pursuing opportunities for the organization would enable Erie Yesterday to better allocate resources and make a greater difference for its member agencies.

For nearly thirty years, Erie Yesterday has overseen coordination within Erie County’s historical community. As this community faces new challenges and amplified existing challenges, the organization must clarify its leadership role, address shortfalls in resources and capacities, and answer the question, “how can Erie Yesterday best serve the Erie County heritage community?”

## **What are Erie Yesterday’s strengths, weaknesses, threats and opportunities?**

**Table 1.1: Strategic Analysis Data**

<p><b>STRENGTHS</b></p> <ul style="list-style-type: none"> <li>Affiliations with other professional organizations</li> <li>Strength in numbers (i.e. members)</li> <li>Enthusiasm for success</li> <li>Strong core group</li> <li>Focused</li> <li>Knowledge</li> <li>Professionally trained members (in history/museum disciplines)</li> <li>Cross promotion between member organizations</li> <li>Experience</li> <li>No debt</li> <li>Few assets</li> <li>Improved marketing exposure</li> <li>Funders support group</li> <li>Varied raw “material” to work with (historic sites, museums, societies)</li> <li>Proven success at project management</li> </ul>	<p><b>WEAKNESSES</b></p> <ul style="list-style-type: none"> <li>Competition for members</li> <li>Expenses outweigh income</li> <li>Tight cash flow</li> <li>Member representatives’ inconsistent attendance</li> <li>Volunteer managed</li> <li>Sometimes poor communication to the external, between members organizations and between member representatives to their organizations</li> <li>Lack of a website</li> <li>Aging membership</li> <li>Need to be taken seriously by members</li> <li>Spotty record keeping for the organization</li> </ul>
<p><b>OPPORTUNITIES</b></p> <ul style="list-style-type: none"> <li>Increased funding to increase programming</li> <li>Collaboration opportunities abound</li> <li>State govt. grants are grasping the importance of heritage programming and preservation</li> <li>Signage trust</li> <li>Community foundation will manage an endowment built by the membership</li> <li>Individual donors</li> <li>Classroom involvement via the passport is good</li> <li>Curriculum development opportunity for a city-wide local history classroom kit via the website</li> <li>Organize history teachers and Professors</li> <li>Build a “historians” in residence for classrooms</li> <li>Advocacy at state and local level is strong</li> <li>Geocaching among heritage sites is building</li> <li>Erie Yesterday is a model program</li> </ul>	<p><b>THREATS</b></p> <ul style="list-style-type: none"> <li>Lack of interest in history by the general public</li> <li>Funding opportunities are shrinking</li> <li>State support for region has always been lacking</li> </ul>

## Vision and Goals

### Mission Statement (Who we are, who we serve and what we do?)

Erie Yesterday is a consortium of historical societies and museums whose mission is to strengthen the heritage community of Erie County, PA in order to connect people to meaningful information and ideas.

### **Vision Statement (What we want to be?)**

Erie Yesterday will become self-sustaining through community accepted fundraising events, grant writing and memberships; and be recognized as a leader within the Erie County historical community.

Erie Yesterday will strengthen the capacity of its member organizations through collaboration, marketing, advocacy and education.

Erie Yesterday will build enthusiasm for local history and cultivate volunteers, patrons and donors of culture/heritage through engaging, historically accurate programming.

### **Strategic Goals**

- 1) Improve the visibility of Erie Yesterday in the Erie County community (externally) and to the membership (internally).
- 2) Develop county-wide educational initiatives to reach students, adults, and teachers.
- 3) Build sustainability plans and programs benefiting Erie Yesterday member agencies and groups.

## **Implementation Plan**

**Strategic Goal:** Improve the visibility of Erie Yesterday in the Erie County community (externally) and to the membership (internally).



Priorities	Action	Owner	Due	Performance Measures
Build community relationships	<p>1) Start Marketing Committee composed of at least one active member of EY and community experts in marketing and public relations. Committee’s charge is to create marketing plan, relationship building plan, brand development and implementation plan, determine industry accepted benchmarks and measurable outcomes evaluation for marketing plan.</p> <p>2) Continue to add public relations information in grant applications</p> <p>3) Continue to hold successful programs</p>	Executive committee sets up Marketing Committee; Marketing Committee completes charge	3 Mos.	<p>1) Same level of brand recognition as Erie County Historical Society and/or Erie Maritime Museum</p> <p>2) Increased membership</p>

**Strategic Goal:** Develop county-wide educational initiatives to reach students, adults, and teachers.

Priorities	Action	Owner	Due	Performance Measures
<p>Provide guidance to members on education initiatives</p> <p>Maintain existing EY education programs and develop new initiatives</p>	<p>1) Survey member’s interest in formal education programming. <i>If interested</i>, provide workshops geared for the specific interest. <i>If interested in informal education</i>, determine specific interest and applicable workshop(s).</p> <p>2) Provide curriculum and material design for member initiatives</p> <p>3) If Erie Yesterday is the presenter - develop community outreach programming, build virtual tours of local museums to assist in their quest to bring in more visitors or members</p>	<p>Education Committee of 2-3</p> <p>Expand education committee (criteria to be determined) to meet obvious needs from survey</p> <p>Expand education committee to bring on skill sets needed to build new programs and models</p> <p>Subcommittee of Education Committee to *survey members who would like virtual tour, design tours as needed. Release tour, gather usage statistics and comments, improve tours, and</p>	<p>Year 1</p> <p>Year 2</p> <p>Year 3</p> <p>Year 1</p> <p>Year 2-3</p>	<p>Create member survey and plan implementation</p> <p>Successful workshops measured by pre-determined criteria</p> <p>Build new education programs with training model for member needs</p> <p>Completed survey results</p> <p>Completion of member-driven tours and use statistics</p>

		repeat process.		
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\*Survey Committee composed of a maximum of 5 members that understand survey design and implementation.

**Strategic Goal:** Build sustainability plans and programs benefiting Erie Yesterday member agencies and groups.

Priorities	Action	Owner	Due	Performance Measures
Assist members with building their capacity to reach their organizational goals.	Survey member’s needs and determine top 1-3 needs. EY can develop workshops on the most relevant topics needed by the members by collaborating with experts (Non Profit Partnership, SCORE, other volunteer orgs).	Membership Development Committee	Year 1  Year 2-3	Completion of survey according to Committee’s criteria  Successful completion of workshop(s)
StEPS program initiative	Introduce EY members to AASLH’s StEPS program to build professionalism of the local organizations. (For interested orgs. only)	Executive Committee	Year 1	Number of EY members involved in program
Heritage Endowment initiative	Introduce the concept of a heritage-based and supported endowment fund at local community foundation for grant making purposes and more stable heritage organizations.	TBD by Executive Committee: may be one well respected community member	Year 1	Number of interested organizations as well as the number of dollars donated

**Immediate Goals for Board of Directors**

- (1) Set up or re-design committees to meet the needs of the action steps associated with each goal:
  - (a) Marketing Committee consisting of 3-5 members, one of which is an Erie Yesterday member, that have the credentials, interest in the organization, network connections in the communities and respectability. The committee is charged with designing a comprehensive marketing/public relations campaign to take place over the next 3 years. Elements of the plan are a marketing plan, relationship building plan, brand development and implementation plan. The committee will also determine industry accepted benchmarks and measurable outcomes for evaluation of the marketing plan.

- (b) Education Committee consisting of as 2-3 members, one of which is an Erie Yesterday member, to create a master plan for survey the organization's members about their education programming needs during year 1. A member of the committee must be familiar with the science and art of survey writing and administration. During year 2 and 3 the Committee may tailor itself to meet the needs of the survey outcome to design the needed programming, this may mean adding members to the Committee, it may be forming sub-committees. The decision is up to the Executive Committee and the Education Committee.
  - (c) Membership Development Committee consisting of 3-5 members, one of which is an Erie Yesterday member, charged with working with the members organizational and capacity building needs. Year 1 will consist of writing and administering a survey of the members to determine their top 3 needs. Year 2 and 3 will be spent designing programming/workshops to address the survey results.
  - (d) Appoint the help of a community member who is highly respected by all member organizations, City and County government, and funders to begin the conversation about a Heritage Endowment Fund.
- (2) The Executive Committee should seek to lead the organization in planning for future succession of members and officers by (a) following the terms limits listed in the By-Laws and/or revising the same to enhance the involvement of more members in leadership positions and (b) seeking to involve more members in committees, especially those suggested by this Strategic Plan.
- (3) The Executive Committee shall seek to keep the membership informed of the regulations set forth in the By-Laws and seek the amendment of the By-Laws where changes are necessary for the survival and growth of the organization.

## **Budget Planning**

- a. The goals of each year determine resource allocation.
  - i. Year 1 will need funds directed toward marketing plan which will be determined by the Marketing Committee.
  - ii. Year 2 will need funds directed toward marketing and education workshops determined by membership surveys.
  - iii. Year 2 will include item 2 above and programming expenses associated with member's tours, and capacity building needs.

- b. Fund resources should include grants, corporate support, member donations and individual donations. Cooperative funding between the member organizations and Erie Yesterday will fund many of the projects and workshops. ***Advance planning and grant research/writing will be key in successful funding.***

### **Operating Plan for the First 12 Months**

- a) Set up Marketing Committee, determine overall marketing/public relations plan as outlined. The strategic plan calls for a three-month timeline for this component.
- b) Set up Education Committee, design, administer and gather results of member education programming need survey. An introduction of the reasoning behind the survey to the member organizations is suggested to obtain the best results.
- c) Set up Membership Development Committee, design, administer and gather results of member capacity assessment and need survey. As above, an introduction of the reasoning behind the survey will be needed to obtain best results. This may be a one-on-one discussion between the Committee and the most interested organizations. The Committee should set a goal of how many surveys they would like to obtain and how many projects from the surveys they feel they can manage in a volunteer capacity.

### **Financial Reports (Attached)**

### **Monitoring and Evaluation**

The Executive Committee should determine if they will be the monitoring/evaluation committee, or if they would like to appoint a small sub-committee (2 people) to report to them on the progress of the strategic plan implementation. If the Executive Committee chooses to monitor and evaluate the plan, then they should set up a reporting process with the appointed Committee chairs to gather the needed information. Evaluation is based on the goals outlined in the strategic plan and those determined by the appointed Committees.

### **Communication of Plan**

- a) Note that certain groups of stakeholders should receive complete copies of the plan, including appendices, while other groups (usually outside of Erie Yesterday) should receive just the main body of the plan minus the appendices. Consider copies of the plan for major stakeholders: funders/investors, trade associations, potential collaborators, vendors, etc.
- b) Every Committee member and member organization should receive a complete copy of the plan.

- c) The website should be updated to reflect highlights from the plan as well as the mission and vision statements.
- d) The mission and vision statements should be displayed at all meetings.
- e) The mission statement should be added to the organization's letterhead.
- f) A thorough training should be held to familiarize all Committee members with the plan.
- g) The By-laws need to be updated to reflect the plan, such as the mission statement and vision statement.