

## ***PATH TOWARD PREMINENCE***

### **THE MARYLAND HISTORICAL SOCIETY 2016-2021 STRATEGIC PLAN**

#### **Summary**

The Maryland Historical Society has become aware of the need to redefine itself in order to be relevant to the present and to thrive in the future. A critical first step was the production of a strategic plan that took into account the changing demographics of the state, the increasing competition for resources and constituents and the decline in the study of history. The plan includes seven major goals with accompanying objectives to be accomplished over a five-year period. If followed, this plan is a path to transforming the organization into a relevant and sustainable educational institution, collaborating with other like-minded entities and reaching the people of Maryland as never before. To accomplish the plan will require an investment of approximately \$25 million.

#### **Current Situation**

The Maryland Historical Society (MdHS) is entering the next era of service to the more than 6 million people – 5.5 million more than when the organization was founded – who live here. The organization must adapt to the state's new demographics and begin to view its traditional components -- the museum, the library, publications and educational programs -- as resources and means to an end, rather than ends within themselves. MdHS will fulfill its vision of creating better citizens by sharing history's lessons drawn from its superlative collections. Our work will focus on content and learning and will rely on emerging media to engage the public. MdHS will personalize the history experience for both individuals and groups, ensuring that MdHS is accessible and valued by diverse audiences as the organization monitors and responds to the ever-changing interests of our culture and its dynamic demographics.

The Strategic Plan for 2016-2021 will focus on growing outside of our traditional boundaries and systematically explore new ways of embracing other groups while maintaining the integrity of our subject matter within the parameters of our mission and vision. This work must be accomplished to attract financial support sufficient to overcome a structural deficit and to fund educational initiatives which amount to greater relevancy for the future.

#### **Context for the Strategic Plan**

The most recent strategic plan adopted by the Maryland Historical Society was written in 2007 to guide the organization through 2013. A series of staffing changes beginning with the appointment of an interim president in 2006 disrupted the planning function of the organization, leaving it to focus on immediate needs such as leadership, financial stability and essential programming development. Following an extended period of interim staff leadership (2006 to 2015), a president was hired and organizational re-development began.

The Maryland Historical Society then became aware of the need to redefine itself in order to be relevant to the present and to thrive in the future. A critical first step was the production of a strategic plan that took into account the changing demographic of the state, the increasing competition for resources and constituents and the decline in the study of history.

MdHS operates today in an environment of radically different demographics than its founders or the leaders of the last 100 years could have imagined. Maryland has one of the country's most

diverse populations with 47 percent minority residents -- the sixth largest in the nation --and the fourth largest population of African Americans, our largest minority. The growth of the number of Maryland's non-profit organizations to more than 31,000 has exacerbated the competition for funding. State funding to MdHS was drastically reduced in 2002 when the state's grant program for history museums ended and funding from the Maryland State Arts Council and the Maryland State Department of Education was also reduced.

National influences also worked against MdHS with philanthropy for arts and cultural organizations ranking the lowest among issues and causes supported by both private and public entities. Issues such as health, homelessness, justice and the environment received more attention as corporate and other donors focused their gifts in these areas. The global recession beginning in 2008 reduced giving levels and raised needs.

Rental and other earned income declined as well as returns from investments. Increased demand for additional programming space and the growth in visitation by the public anticipated by the organization's facilities expansion of 2003 did not occur. Instead, there was a surplus of space and unused, minimally maintained real estate and other assets including the collections. These conditions forced MdHS to reduce staff in 2006 from 80 to the current staff of 30. Further draining the organization's resources was the relocation of stored collections from three off-site locations which were sold or relinquished. These items and three collections in the custody of Baltimore City were co-stored at the Monument Street headquarters and never properly inventoried or organized. The continuing decline of the society's Mount Vernon neighborhood also worked to its detriment in terms of visitation. Most recently, civil unrest in the City of Baltimore caused an abrupt drop in visitation to cultural and recreational attractions including MdHS.

It became increasingly apparent that the business model for historical societies whose major support was provided by the private sector was not sustainable. With the proliferation of cultural and entertainment options, competition for the visitor and the supporter tightened. And, yet, history enjoys popularity with certain audiences – evidence of this is the success of the History Channel and such programming as PBS's *Downton Abbey*, *Finding Your Roots*, *Antiques Roadshow*, and the astonishing success of Broadway's *Hamilton*.

As the teaching of history diminished, particularly in public schools, the market for outsourcing history curriculum increased. Fortunately, technology allows curriculum to be shared efficiently and inexpensively, replacing the need for onsite visits by classes.

### **Strategic Planning Process**

In November 2015, MdHS engaged Bryan & Jordan Consulting, LLC, to guide the strategic planning process. A committee of board and staff and one public educator were selected to develop the plan and prepare for its presentation for adoption to the board of trustees. Information was gathered by the consultant from a number of board members, opinion leaders and donors. The committee researched and interviewed representatives of five peer organizations, noting their recent accomplishments and responses to similar challenges faced by MdHS. A survey of members' attitudes toward the MdHS was taken by the Development staff. Key points from that survey include the desire for greater emphasis on recent history, educational programming, digitization, outreach and partnerships. All this information was used by the strategic planning committee to create a vision of what the organization should become by the year 2026. During a series of committee meetings and two half-day full-board "retreats," participants condensed nine goals into six. The committee worked to clearly define objectives

within each goal, to assign the objectives' completion to specific staff and/or board members, to estimate the cost of each objective and to set timetables for beginning and completing them. From that, an overall budget and fundraising goal was produced to accompany the plan. In September 2016, a draft plan, already approved by the Executive Committee, was submitted to the full board for adoption.

### **Strategic Planning Committee**

Consultant: Charles Bryan, Bryan & Jordan Consulting, LLC

Board members: Richard Tilghman, Louise Hayman, Page Lyon, Willis Macgill, Chandler Denison, Tim Chase

Staff members: Mark Letzer, Katie Caljean, Sean Valentine, Dennis Elder

Educator: Ryan Kaiser

### **Mission**

The mission of the Maryland Historical Society is to educate people of all ages about the American experience through the rich history of Maryland using the Society's collections, and to preserve important objects and archival materials from prehistoric Maryland to the present day.

### **Vision**

The Maryland Historical Society will become known as the state's preeminent center for Maryland history by 2026, the 250<sup>TH</sup> anniversary of American independence, focused on educating the public through its vast and unique museum and library collections. It will do so within the context of changing demographics and social values, using technology to connect the collections with those who may benefit from the lessons and stories they portray.

### **Core Values**

#### **1. History & Civic Engagement**

We are committed to improving people's lives by sharing Maryland's history. Creating meaningful connections by providing engaging programs and educational services to the diverse communities throughout the state is vital to our success. An understanding of history leads towards civic engagement, critical thinking, and appreciation of multiple perspectives. By teaching Maryland's rich and diverse history we create better citizens.

Examples:

- Stitching History / MHAA Grant
- Preserve the Baltimore Uprising website
- OURstory, a Digital Storytelling project

#### **2. Quality & Excellence**

We are proud of the products and services created by MdHS. In all aspects of operations, we strive to meet the highest standards of excellence. We regularly solicit feedback to ensure that all stakeholders feel that their experience remains exceptional and we look for ways that we can improve.

Examples:

- *Underbelly* library blog named as *Baltimore Sun* “10 Best”
- Named one of the best museums by *The Washington Post*
- Annual Membership and Staff Survey

### **3. Authenticity & Credibility**

Authenticity is unembellished, unfiltered, and demands impeccable scholarship. Everything produced by MdHS is based upon these principles. If we are not expertly qualified internally, we seek to partner with other authoritative voices to produce works that are fair, balanced, and true.

Examples:

- Maryland Historical Magazine
- Lord Baltimore Fellows / Wing Fellowship
- Publications / *A Woman of Two Worlds: Elizabeth Patterson Bonaparte*

### **4. Honesty & Integrity**

Our integrity is the basic foundation for the sense of trustworthiness on which we base our internal and external relationships. Our reputation and authenticity depend upon it.

Examples:

- Clean yearly audits
- Adherence to fundraising code of ethics from AFP
- Requests for multiple RFPs on special projects and procurement

### **5. Creativity & Innovation**

Creativity drives us to generate new and innovative experiences for visitors and imagine different ways of meeting people’s needs and expectations. We strive to be original and creative thinkers. To transform these ideas in to actions, we must take risks and encourage staff to use their imaginations to solve problems and explore new ideas.

Examples:

- Historical Investigations Portal (HIP)
- Virtual Fieldtrips through Timeline Studios
- BEARINGS Map, circa 1814

### **6. Collaboration & Partnerships**

Collaboration involves inclusivity, sharing ideas, seeking the contributions and viewpoints of others, and reflecting this input in our work. We value teamwork and multiple perspectives, both internal and external. We strive to be invested members of our surrounding community and seek out meaningful partnerships throughout the state.

Examples:

- Historic St. Mary’s City / Calvert Lead Coffins
- German American Society / Deutschland
- Mount Vernon Cultural District

## History of the Organization

The Maryland Historical Society (MdHS) is the state's oldest continuously operating cultural institution. In January 1844, the founders gathered in the Maryland Colonization Society rooms of the Baltimore City post office. They proposed collecting the "remnants of the state's history" and preserving their heritage through research, writing, and publications. The society's early success inspired plans for a permanent home to include an art gallery. One of America's foremost architects, Robert Carey Long, designed the Athenaeum for them, a four-story "Italian palazzo" building with -- most important for the society's preservation-minded mission -- fireproof closets.

Membership and support increased during the 1850s after the society settled into the Athenaeum. Visitation grew along with the art collection. Financial donations came from a variety of people including Baltimore philanthropist George Peabody who funded an index of Maryland records in London and established the society's first publications fund. Additionally, the MdHS continued caring for state records, and late in the 19th century, the state transferred government records into its care.

The turn of the 20<sup>th</sup> century was an era of great change for the nation's historical societies. Education of the general public became part of their missions, and women were allowed membership. In 1906 the MdHS launched the *Maryland Historical Magazine*, a quarterly journal featuring the best new work on Maryland history. This venerable publication is now in its 110<sup>th</sup> consecutive year.

The organization moved to its current home in 1919. The former residence of Baltimore philanthropist Enoch Pratt, with a state-of-the-art fireproof addition, came as a gift from Mary Washington Keyser, whose husband, H. Irvine Keyser, had been an active longtime member. The new space allowed for more displays and further positioned the society as the caretaker of Maryland treasures. Many researchers looked for evidence that connected them to the colony's founders or Revolutionary War veterans in order to claim membership in genealogical societies. In addition to their dedication to preserve and publish Maryland's early history, the leaders of the society took responsibility for preserving recent history. As their predecessors had done after the Civil War, society leaders collected "the relics" of the recent Great War. In 1920, the state legislature created the Historical Division of the state's War Records Commission. This agency served as the "official organ" of the federal government in collecting and compiling the military records of Marylanders who served in World War I. The society initiated a similar agreement during World War II. By then, educational programs were a high priority, and the post-war MdHS reached out to the city's public schools with teacher workshops and tours.

Educational activities were only part of MdHS programming. The society began expanding the Monument Street facility in 1953 adding the Thomas and Hugg building in 1968. The interior included exhibition space, an auditorium with audio-visual equipment, work rooms, storage space, and "to supplement the present Confederate Room-a Civil War Union Room." In 1981, the society added the France-Merrick Wing to the Thomas and Hugg Building.

Perhaps no other object in the holdings of the Maryland Historical Society attracts more visitors than the original manuscript of Francis Scott Key's Star-Spangled Banner. In 1953, Mrs. Thomas C. Jenkins purchased the document from the Walters Art Gallery for \$26,400, the same price the gallery had paid for it in 1933 at a New York auction. In 2012, the bicentennial of the War of 1812, the manuscript was exhibited at the Smithsonian Institution.

The growing diversity of Maryland's population prompted a dramatic shift in the study of history. Politics, wars, and the lives of notable men gave way to research and fascination with previously neglected fields such as women's history, African-American history, and ethnic histories. Genealogical study and research has grown enormously popular.

The MdHS library's renowned collections of church and parish records, ship passenger lists, manuscripts, and the meticulously copied indices to early wills and land tracts gave researchers missing pieces of their genealogical puzzles. Indefatigable librarians and volunteers assisted both the novice and professional researcher. Members of the Maryland Genealogical Society, local patriotic societies, and numerous organizations, continue the tradition.

A newly renovated and expanded Maryland Historical Society opened in 2003. The complex now includes the Beard Pavilion and the Carey Center for Maryland Life. These feature exhibition space for the museum and library and storage space for the museum's collections. Through technology, MdHS serves more than 100,000 school students and teachers annually, on-site and virtually. Using our collections, the educational programs teach multiple generations Maryland's pivotal role in the nation's past. The renovated library, now the H. Furlong Baldwin Library, includes more than double its previous space. Today's researchers work in a well-lit and spacious room with access to society holdings.

In keeping with the founders' vision for telling Maryland's story, the society's leadership, staff, and volunteers carry out today's mission, through its museum, library, press, and educational programs. With over 350,000 objects and 7 million books and documents, the institution serves Marylanders of all ages and those interested in the history of one of the nation's earliest colonies. MdHS publications provide a forum for Maryland topics of scholarly and general interest. The society sponsors a dynamic schedule of educational programs and special events to make Maryland's history come alive. Lectures, symposia, programs for children, gallery tours, and many other public programs, held both on- and off-site, promote pride and understanding of Maryland's rich history. As it has been for the past 172 years, the Maryland Historical Society remains the premier institution for Maryland history.

## Goal 1: Make MdHS More Relevant to All Marylanders

**Just as the demographics of Maryland have changed drastically in the immediate past, the audience for MdHS has too. Programming must be driven by the needs and interests of the people of Maryland.**

### Objectives

- Engage greater diversity: ethnic, geographic, economic, cultural, and age beginning with diverse representation on the board of trustees. Analyze and identify current audiences and identify those least served and with greatest potential for engaging.
- Finalize a five-year exhibit and program schedule to present more recent history and other topics relevant to larger and more diverse audiences. Select topics for acquisitions, exhibits, public programs, and collaborative programs, rating them for appeal to larger and more diverse audiences, and their entertainment value and ability to engage people on a personal level (e.g. *Find Yourself at the MdHS!*). Statewide outreach should be a priority for all programming.
- Extend the impact of education department resources to all 24 Maryland school systems through digital outreach programming. Continue development of the *Historical Investigations Portal* as classroom resource for the teaching of social studies and integrated literacy, including the hiring of a full-time program manager, migration of existing lessons to a more sustainable platform, creation of new lessons, and hosting of materials produced by other cultural institutions. Improve marketing of Distance Learning programs to cultivate new audiences in-state and nationwide and increase the number of students served to 7,500 annually and adults served to 5,000 annually.
- Seek designation and funding as the State's official history museum. Such designation and appropriate funding could include the following: providing history curricula in middle and high schools; formal association with history departments of State higher education institutions; exhibit space and storage for State-owned collections; administration of State funding for other history museums; administration of State of Maryland's observance of the 250<sup>th</sup> anniversary of American Independence (2026).
- Study impact of free admission and participation in core MdHS programs.
- Offer all programs and services remotely and virtually. Develop a plan to provide total digital access to the collections within 15 years. Upgraded technology will enable a more comprehensive database of collection records and influence other programmatic areas to include distance learning for specific audiences (members, schools, retirement communities, researchers). (Cf. Virginia History Explorer.)
- Expand genealogical programming and seek partner (e.g. Maryland Genealogical Society, other libraries, Maryland State Archives, Family Search) in preparing library materials (e.g. manuscripts, images, maps and other primary sources) for increased use and accessibility both on-site and remotely.
- Hire librarian to accomplish above two objectives and attract greater scholarship and researchers to the institution.

## **Goal 2: Improve Stewardship and Conservation of Collections**

The core of the organization is the collections that have been entrusted to MdHS since its founding in 1844 and those items that have been purchased with funds raised from donors and supporters. Together, they constitute one of the finest such collections in the nation. Understanding and assessing the scope of these collections is critical to future conservation, accessioning, deaccessioning, programming and development efforts. The future relevance of the organization depends on the successful completion of this goal.

### **Objectives**

- Develop conservation plans for museum collections and library.
- Develop and implement deaccession plans for collections and library.
- Resolve ownership and future of “Baltimore City Life Museum collection.”
- Acquire collections to compliment more diverse programming and attract new constituents. Identify content gaps needing acquisition, accessible duplicate holdings in other institutions and specific target acquisitions.
- Upgrade storage facilities to permit access to library and museum collections by scholars, researchers and other selected consultants.

## **Goal 3: Repurpose Unused Real Estate & Complete Deferred Maintenance of Facilities**

The organization must immediately develop a plan to maximize the use of its excess real estate and complete deferred maintenance on facilities it will continue to use. This plan should respect and enhance the neighborhood and benefit the long-term vitality and fiscal health of the organization. These must be achieved if MdHS is to continue to be regarded as a responsible steward of its collections and other assets and a contributing part of the Mount Vernon and Westside neighborhoods.

### **Objectives**

- Assess alternatives for campus, estimating future space needs, determining redundant resources and best use of buildings and grounds. Assessment will include communication with interested parties such as neighborhood organizations, community development agencies, municipal and state government and developers. Sell or otherwise offer for compatible use currently redundant space.
- Perform deferred maintenance to Thomas and Hugg, Library, and bar buildings and grounds.

## **Goal 4: Rebrand the Institution to Increase Visibility and Relevance**

Transforming the institution through the implementation of this strategic plan calls for communicating the value and capacities of the “new” organization, particularly since the plan includes outreach to new audiences and reintroducing MdHS to its current

**constituents. Additionally, a comprehensive branding campaign will provide discipline for integrating the programs and services of the institution to a degree not done before.**

#### **Objectives**

- Engage a firm to prepare a marketing plan for the organization to reflect its future direction. Plan will include recommending and testing a name change. Scope of work will include research and message testing, launch of new name (if selected), design services, graphics manual, signage, review and recommendations regarding existing and potential communications vehicles (e.g. public relations, advertising, marketing, electronic communications and social media).
- Add communications director to carry out communications plan and adapt as necessary.

### **Goal 5: Achieve Financial Stability**

**MdHS must achieve financial stability if it is to thrive. This demands that it generate annual operating surpluses, net of “funded depreciation.” These surpluses can help fund new initiatives without the need for additional capital. To generate surpluses, MdHS must increase its endowment and generate higher revenues, as expenses have been pared to a point where further cuts would be imprudent. Achieving higher revenues will require staff additions as described in this plan.**

#### **Objectives**

- Engage a consultant to conduct a feasibility study for a fundraising campaign and the timetable for conducting it that will increase the endowment by \$6 million and provide funding for the expenditures defined in the strategic plan, additional endowment and the cost of the campaign (approximately \$25 million total). Merely to eliminate the current structural operating deficit will require increasing the endowment by \$6 million at a 5% annual draw. Higher revenues and a larger endowment will enable MdHS to reduce the endowment draw from the current 5% to 4%.
- Hire a Development Director to provide oversight to the Development function and the fundraising campaign.
- Explore hiring a Chief Operating Officer to focus on redevelopment of the campus and administrative functions and allow the President to devote the majority of his time to the fundraising campaign.
- Strengthen the board’s financial capacity by adding persons with commitment and philanthropic track records. (The board must provide for one-quarter to one-third of the campaign’s goal.)
- Develop a robust planned giving program. Planned gifts should be accounted for in accordance with organizational policy and, unless otherwise designated by the donor, irrevocable planned gifts not yet received should be counted (at present value) toward the capital campaign goal.
- Increase efforts to obtain grants from private foundations, corporations and governmental agencies from current 51 per year yielding \$500,000 (Corporate

Foundations = 3, Private Foundations = 40, Local Govt = 5, State Govt = 3) by 10 percent each year.

- Identify new revenue sources.
  - Institute annual gala to net a minimum of \$50,000 per year and attract broad participation by members and friends of MdHS.
  - Identify new donors (including members that do not now make annual gifts).
  - Develop and implement plan for personal contact by the President, Board members and other staff members with prospects beyond current practice of mail solicitation.
  - Establish “council” of former and prospective Board members and hold events to re/engage them.
  
- Increase revenues from existing sources.
  - Increase annual giving by 10% per year over five years beginning July 1, 2017. Solicit key donors and Board members for multi-year pledges, and all supporters should be encouraged to increase their annual gifts.
  - Increase event rental income by 10% per year over five years taking advantage of improving neighborhood. The Rentals Manager should develop a marketing campaign aimed at event planners, businesses and the general public.
  - Reassess and develop fee schedules and policies for imaging services and the library to assure revenues exceed costs. This should include on-line and on-site research assistance on an hourly fee basis, aggressively marketed on our website and elsewhere to members, historical researchers and genealogists.
  - Grow revenues from museum store by at least 10% per year over the period ending June 30, 2021. Emphasize consignments as there is no inventory risk. Increase marketing of store.
  - Increase revenues from programs and exhibits through sponsorships and partnerships to ensure revenues exceed costs. (See Relevance Goal.)
  - Lease vacant space on our campus while pursuing re-development efforts. (See Real Estate Goal.)
  - Support restoration of state history museum grant program to better serve the people of Maryland.

### **Goal 6: Install Technology for Security, Efficiency and Accessibility**

**Enhanced technology has the greatest potential for meeting the mission of the organization by expanding the audience and its revenue streams. Conversely, without**

**significant investment in technology, MdHS will be hampered from achieving all of its goals and unable to achieve its vision as the premier institution for Maryland history resources and education. Deferring this investment is not an option.**

### **Objectives**

- Complete comprehensive study of technology needs with recommendations for implementation schedule and cost estimates for each step. Although the technology study occurs as the first step, the following additional objectives have been identified as necessary to the success of the institution. Deadlines and costs are best estimates and could be affected substantially by the results of the study.
- Redesign and enhance website creating robust platform that is current, easily managed and navigated, scalable (computers, phones, tablets, etc.) and is fully optimized for search engines.
- Upgrade systems to permit streaming and recording educational programs for distribution on line and in Distance Learning program and to allow member-only or paid access.
- Install campus-wide, dependable, high speed Wi-Fi to meet needs of visitors and all organizational programming.
- Purchase software and subscription services to streamline and integrate operations including development, library, museum, accounting, and education.
- Purchase hardware to accommodate new programs and support office functions such as servers, workstations, switches, increased backup capability, cameras, audio recorders, sound systems, tablets for school tours, video conferencing systems, etc.
- Upgrade external and internal campus security including surveillance cameras with related video storage and playback, secured access to non-public areas including elevator controls.
- Hire IT manager to serve additional IT services and staff.

### **Goal 7: Improve Administrative Policies and Procedures**

**The implementation of this plan will require several administrative actions included in the following objectives.**

- Revise the bylaws of the corporation as necessary to align with the goals and objectives of the strategic plan and to enable its implementation in the most efficient and expeditious manner.
- Review committee missions, structure and membership for inclusion in revised bylaws.
- Revise and/or adopt as necessary procedures and policies consistent with best practices of a non-profit organization.
- Review progress on strategic plan at each board meeting during the life of the plan.

- Improve process for board selection including clarifying criteria and qualifications, roles and responsibilities. Provide effective orientation materials. Regularly review expectations and individual roles including committee participation and financial support.
- Increase investment in staff. Develop plan and implement regular staff performance appraisals and thoroughly assess each department's current and anticipated staffing requirements to implement this plan. Review salaries and benefits with upward adjustment budgeted annually as appropriate. Review, adopt and implement employment and organizational policies as needed.