

# DEVELOPING A STRATEGIC PLAN



Kathy Dickson

Director of Museums and Historic Sites

Oklahoma Historical Society

[kdickson@okhistory.org](mailto:kdickson@okhistory.org)

405-522-5231





If you can't  
predict the future  
why plan at all?

When you don't have a plan...

It is very  
important I get  
this done...

**SQUIRREL!**



it is easy to be distracted by squirrels!



A good strategic plan can help take the stress out of that *To Do* list









Getting  
Started




Plans that are only a few pages long get used for something other than collecting dust.



If possible it is a great idea to get away together...yoga and meditation optional.





**FACILITATOR MEANS....  
A PERSON THAT  
MAKES THE  
LEARNING ACTION  
OR PROCESS  
EASY OR EASIER**



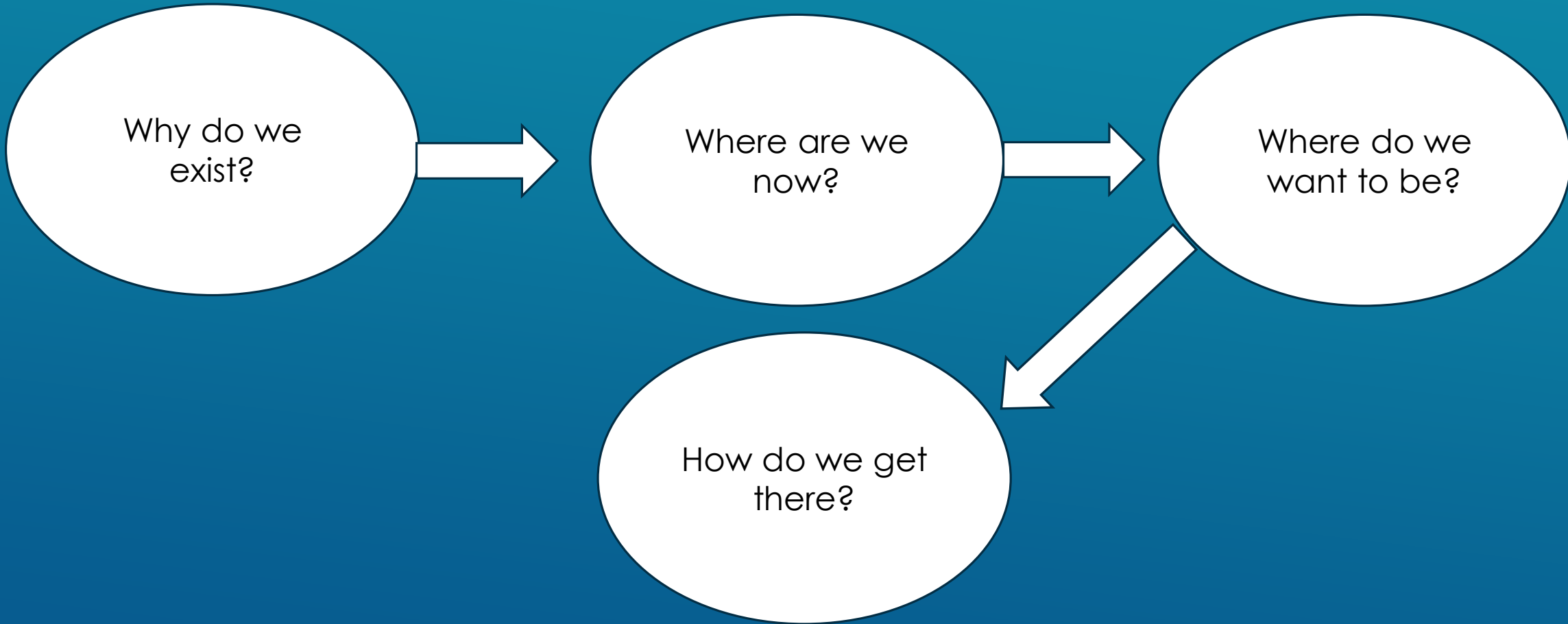
An outside facilitator can help you see what is right in front of you.



Don't have time for a retreat?

There is always time for ninja strategic planning.

# The four big questions for your strategic plan





# Mission vs Vision: What's the difference?

Why do we  
exist?

Answer this question and you have your mission statement!

Where do we  
want to be?

Answer this question and you have your vision!

The organizational equivalent of "What do you want to be when you grow up?"

# The best mission statements are:

- ❑ Attainable
- ❑ Clear
- ❑ Inspirational --- It is not a fact sheet!
- ❑ Short!

# TED

Mission: Spread Ideas

Vision: TED is a global community, welcoming people from every discipline and culture who seek a deeper understanding of the world. We believe passionately in the power of ideas to change attitudes, lives and, ultimately, the world.

# LinkedIn

Mission: To connect the world's professionals to make them more productive and successful

Vision: To create economic opportunities for every member of the global work force

# Jet Blue

Mission: To inspire humanity both in the air and on the ground

Vision: We are committed to giving back in meaningful ways in the communities we serve and to inspire others to do the same.

# PayPal

Mission: Reimagine money to democratize financial services, so that managing and moving money is a right for all citizens and not just the affluent.

Vision: Every person has the right to participate fully in the global economy. We have an obligation to empower people to exercise this right and improve financial health.

## **IKEA**

Mission: Offer a wide range of well-designed, functional home furnishing products at prices so low that as many people as possible will be able to afford them

Vision: To create a better everyday life for many people

## **Smithsonian Institution**

Mission: The increase and diffusion of knowledge

Vision: Shaping the future by preserving our heritage, discovering new knowledge and sharing our resources with the world

## **The Buffalo Bill Center of the West**

Mission: Connecting people to the stories of the American West

A computer on every desk and in every  
home

Microsoft

# Time for a SWOT analysis

**S**trengths

**W**eaknesses

**O**pportunities

**T**hreats

So you have your mission (why you exist) and your vision (where you want to be). You have looked at your strengths, weaknesses, opportunities and threats.

Now what?

Time for strategic goals.





•

**Three to six goals are plenty!**

**Seriously**

**GOAL 2: ALHFAM delivers unique content and resources unlike what other museum associations provide** for members and those involved with living history and historic agriculture.

<p>Objective 1:</p> <p>Ensure resources are useful, easy to access and relevant to the needs of our membership. New resources should be intentionally developed and cultivated.</p>	2021	<ul style="list-style-type: none"> <li>•Strengthen organizational awareness of the STP initiative</li> <li>•Enhance the STP and ASK platform including Sharepoint Upgrade</li> <li>•Continue to bolster web presence using multiple platforms with the goal of driving traffic to ALHFAM’s website</li> </ul>	STP Committee; Communications
	2022	<ul style="list-style-type: none"> <li>•Investigate funding to create <i>accessible</i> resources, such as closed-captioning for virtual meetings or sessions.</li> <li>•</li> </ul>	Development Committee
		<ul style="list-style-type: none"> <li>•</li> </ul>	

# 1. Increase Outreach

In order to fulfill our role as a regional heritage center our reach must expand to all of northwest Oklahoma. A variety of methods will be enacted to fulfill this goal.

Main Objectives:

Increase attendance to CSRHC

- Extend hours of operation to include Sundays
- Establish city, local, and regional museum tours originating at CSRHC
- Create a digital marketing plan with a strong social media component

2021

- ▶ Establish maintenance endowment
- ▶ Form committee to inform land run interpretation in new exhibits
- ▶ Change hours of operation to include Sundays
- ▶ Continue History Alive! on the Cherokee Strip living history program on 1st & 3rd Saturdays
- ▶ Create prioritized list of maintenance projects
- ▶ Create digital marketing plan

**S**pecific

**M**easurable

**A**chievable

**R**elevant

**T**ime-based

Goal #1: Improve the Care and Accessibility of the Collections

Goal #2: Increase Financial Stability

# Goal #1: Improve the Care and Accessibility of the Collections

## Objectives:

- Complete an inventory
  - Action Steps:
    - Research and purchase a collection inventory software
      - When: 2022
      - Who: IT committee/curator/executive committee/Joe
    - Purchase new collections computer
      - When: 2022
    - Organize/train volunteers to assist with inventory
      - When: 2023
- Reorganize collection storage
  - Action Steps:
    - Complete shop drawing of storage and build furnishing plan
      - When: 2024
    - Purchase and install warehouse shelving
      - When: 2024
    - Rehouse collection items
      - When: 2023
    - Remove non-collection items from collection storage



Don't forget to get the plan approved by the board of directors. It should be the only plan for the organization.



