



## **STRATEGIC PLAN UPDATE, YEAR 2**

**January 11, 2011**

### **Phase I ~ September 2009 – January 2011**

In January 2011 HSP had completed 16 months of its four year Strategic Plan (approved September 2009). Despite the first year being intended as time to “plan the plan,” approximately 51% of the 114 tactics associated with the 23 objectives were completed. While the 2010 Annual Report documents many of these achievements, it is notable to mention that HSP launched the Digital Center for Americana (DCA), processed 55 civil-war related collections, and digitized around 9,000 items (almost doubling the original goal) which through a newly configured digital asset management system (DAMS) will be fully searchable online in early 2011. Over this period HSP had the most successful adopt-a-collection program to-date, conserved over 1,000 items, and developed the Discover tool that aggregates HSP’s multiple old collections databases into one easy-to-use online search.

In terms of programs and services, HSP hired a full-time Senior Director of Information Technology, and a Senior Director of Programs and Services. The *PhilaPlace* website was launched and more resources were provided for genealogists. The distribution of the *Philadelphia Magazine of History and Biography* was contracted to JSTOR online, resulting in an average of 3,000 article-downloads a week during the academic year, while the Fall 2010 *Legacies Magazine* was delivered to 900 public schools across Pennsylvania. HSP completed a needs-assessment of around 320 small history and heritage organizations in the five-county area, and attracted over 6,000 visitors to programs onsite, over 400,000 online, and increased unique visits to the website by around 15%. In addition HSP now numbers around 10,000 e-subscribers from all around the world.

At 1300 Locust Street, HSP replaced its two largest air handling units, began repairing a portion of the roof, and completed a facility Master Plan Report by the architectural firm Ewing Cole.

On the balance sheet, \$2 million was added to the board restricted fund for the care and conservation of the collection, and HSP was granted a \$2.5 million capital grant from the Commonwealth of Pennsylvania. Membership stabilized after simplifying the categories and launching a new young friends program. The most financially successful Founder’s Award

dinner to-date was held in 2010, and Mayor Michael Nutter unveiled an historic marker out the front of the building. Despite a fall in investment income and declining sources of grant support due to the economy, HSP ended the fy2010 fiscal year with no debt.

## **Phase II ~2011 – 2014**

While the achievements mentioned above are marvelous, the fact that more than half of the goals of a four-year strategic plan have been reached in the first year shows that HSP needs to develop more robust objectives. HSP's Board has decided to become more ambitious, more deliberate, and specifically ensure that HSP's infrastructure – physical and intellectual – is properly configured over the next three years. A priority has been placed on solving budgetary issues and making HSP's programs and collections relevant and available to our four target audiences.

Listed below are ongoing, expanded, or new objectives for 2011-14. Below are what HSP considers to be the three most strategically important issues to be addressed:

1. Capital needs. Specifically, (a) raising the funds and finishing the renovation of 1300 Locust for the near term, with an emphasis on increased collections storage, care, and access; and (b) confronting HSP's need for expansion in the longer term
2. Financial Stability. Specifically, (a) increasing earned revenue (b) growing the endowment, or (c) developing a combination of the two.
3. Create an identity for HSP's Programs and Services. Specifically, by (a) increasing HSP's visibility and accessibility on the web by posting digitized documents online, (b) actively delivering content through traditional and social media, (b) reinforcing ethnic and immigrant programming under the Balch name, (c) positioning HSP as *the* leading center for genealogy in the mid-Atlantic region, and (d) continuing to support other history and heritage organizations.

## **MISSION**

*We inspire individuals and organizations to create a better future through historical understanding.*

## **VISION**

**We envision a world where everyone understands the past, engages in the present, and works together to create a better tomorrow.**

## **VALUES**

- **Collaborative** - in working with many individuals and organizations to realize HSP's vision
- **Inclusive** - in embracing multiple cultures and viewpoints

- **Accessible** - in making HSP's collection easily available to individuals and organizations
- **Innovative** - in considering new ways to collect, care for, share, and interpret HSP's collections

## **GOALS**

HSP has identified six **strategic goals** over the next four years:

1. Ensure that 100% of HSP's collections are documented, protected, and made available for study.
2. Expand our four audience groups (educators, family and community historians, researchers, and other organizations) in both reach and range by ensuring that the collections are easily accessible through on-site services, technology, publications, membership, and community programs.
3. Increase our support to the history and heritage organizations of Pennsylvania.
4. Develop, fund, and implement a capital improvement plan that takes into account HSP's needs up to the next 25 years. (amended goal 2011)
5. Stabilize HSP's financial position. (amended goal 2011)
6. Develop our staff and board to realize HSP's potential to become a leader in the history and heritage community.

## **OBJECTIVES** *(placed in order of importance under each heading)*

### **Collections**

---

- 1.1 Covert the remaining catalogue cards into online records.
- 1.2 Convert the microfilm into digital records.
- 1.3 Expand the Digital Center of Americana (DCA).
- 1.4 Develop a tiered plan of preservation & conservation for all of HSP's collections
- 1.5 Increase search capability of the Online Public Access Catalogue (OPAC) through authority work, database cleanup, new OPAC server, Voyager system upgrade, and customization.

- 1.6 Compile accurate location information for library materials by shelf-reading all open stack areas, and creating an upgraded location guide, newspaper file, comprehensive microfilm guide and backlog report.
- 1.7 Put basic descriptions for all our archival holdings and in-depth descriptions for 60% of our archival holdings online.
- 1.8 Create a new online digital collection that provides direct access to 10,000 digital facsimiles and 47,000 graphics.

### *Programs & Services*

---

- 2.1 Improve services for researchers and visitors onsite.
- 2.2 Build a robust and interactive Website and develop and implement a social network program that makes it easy for individuals and organizations to more easily access our collections.
- 2.3 Actively deliver content to traditional and social media.
- 2.4 Develop a distance learning program linked to HSP's other media that will reach schools and libraries.
- 2.5 Develop HSP as THE leading center for genealogy in the Mid-Atlantic region.
- 2.6 Develop a culture of assessment benchmarking, and evaluation to improve service.
- 2.7 Continue to produce *Legacies* Magazine.
- 2.8 Continue to publish four editions of the Pennsylvania Magazine of History and Biography (PMHB) a year.
- 2.9 Maintain and expand HSP's fellowship program.
- 2.10 Improve the teaching of American history in Pennsylvania's schools by working closely with regional and state educators and aligned groups to advocate for history education and to provide the materials needed for curriculum development.
- 2.11 Develop an educator's portal on HSP's new Website that utilizes new media to create accurate, engaging, and standards-based materials to disseminate HSP's collection.
- 2.12 Plan and implement online digital document transcription projects.
- 2.13 Brand all programs relating to ethnic and immigrant history under the Balch Institute of Ethnic Studies name.

- 2.14 Make a commitment to National History Day programming.
- 2.15 Develop both online, onsite, and in print, professional development opportunities for educators.
- 2.16 Reposition [www.philaplace.org](http://www.philaplace.org) as a shared platform managed and funded through a consortium of partner organizations.
- 3.1 Further support the history and heritage community by developing the History Affiliates program.

### *Infrastructure*

---

- 4.1 Complete the estimated \$5 million short-term renovation of 1300 Locust Street.
- 4.2 Solve HSP's long-term space requirements by considering a number of expansion options.
- 5.1. Develop a financial model that provides HSP with a stable income base and 10% of total budget surplus.
- 5.2 Undertake a capital and endowment campaign.
- 6.1 Ensure HSP is a fair, safe, professional and stimulating place to work.
- 6.2 Implement HSP's records management policy and expand it to include electronic records.