Willamette Heritage Center at The Mill
Forging the Future
2010-2013 Strategic Plan
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Willamette Heritage Center at The Mill
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Adapting and Measuring Results

This 2010-2013 Willamette Heritage Center at The Mill (WHC) strategic plan was developed through discussions, considerations, community engagement, research and analysis leading to decisions made by WHC Board and staff. Background data and research is included in extended version of the Strategic Plan. This plan will guide the work of WHC as it moves into the future.

Each quarter, staff will review progress on key measures. During these quarterly review sessions, action plans and calendars will be revised. New assumptions and recommended adjustments will be presented to and discussed with the Board.

Each July, staff will begin annual planning and budgeting, reviewing the first two quarters’ results and reconsidering this strategic plan. During this annual review, the strategic plan’s objectives and strategies will be adapted to changing conditions and reflect the past year’s progress.

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Amy Vandegrift, Director of Library, Archives and Collections

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Cheryl Clark, Publicist
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Kylie Pine, Curatorial Assistant
Kathleen Schulte, Education Coordinator

Strategic planning with support of The Canoe Group, Inc: David Frackelton, Michael Kosmala & Marta Mellinger
September, 2010

Last year when Amy Vandegrift, director of Marion County Historical Society, and I started talking about possibly merging our two heritage organizations, we did not particularly know where our efforts would go, but we knew that the possibilities were tremendous. We firmly believed that a united organization would create a stronger cultural institution that could better serve the community. After thorough study, the Boards of both museums unanimously endorsed the idea. On January 1, 2010 we joined, and the Willamette Heritage Center at The Mill (WHC) was born.

We had many goals, desires, concerns and dreams, but we lacked a “road map”, a focused plan that would help the WHC achieve its potential. The Oregon Community Foundation provided a planning grant enabling us to engage The Canoe Group in facilitating the development of a strategic plan. Like any worthwhile project, a significant part of the value has been in the process. Much has been learned about who we are, what we could become, what our stakeholders envision, and what the community needs. After nine months of hard work by board members, staff, volunteers and interested community members, I am proud to present the WHC 2010-2013 Strategic Plan.

We believe our plan can help guide the Center’s growth as it becomes the major historical museum for the Mid-Willamette Valley. As you will find, this Strategic Plan presents WHC’s new mission, values, goals, vision and objectives as well as an exciting new interpretive plan. One of the Plan’s most important features, however, is the promise we make to the community: The Willamette Heritage Center intends to be the Salem-area cultural institution that encourages younger generations to learn about our heritage.

From education comes knowledge, from knowledge comes interest, from interest comes appreciation, from appreciation comes affection, from affection comes involvement, from involvement comes ownership, and from ownership comes a desire to preserve. The intention of the new WHC, expressed throughout this new strategic plan, is to preserve and interpret the past for many generations to come.

Thank you for your interest and support.

Peter MacMillan Booth, Ph.D.
Executive Director: Willamette Heritage Center
Willamette Heritage Center Mission, Purposes, Vision & Promises

**Mission:** “To inspire, connect and encourage understanding, the WHC engages community to preserve and share our heritage.”

**Purpose:** Willamette Heritage Center collects, cares for, interprets, showcases, and promotes understanding of and education about the history of the Willamette Valley region, including Marion County and the greater Salem area. The Center is anchored by the historic early settlement buildings, the Thomas Kay Woolen Mill and its archival and library holdings.

Willamette Heritage Center Values
- Education
- Preservation
- Scholarship and integrity
- Inclusion and engagement
- Commitment and tenacity
- Enjoyment and inspiration

Willamette Heritage Center Vision

**What will WHC look like in 10 years?**
- WHC will be a major regional history museum and a leading destination for heritage tourism in the mid-Valley region
- WHC will pursue and achieve best practices in museum management as recommended by the American Association of Museum.
- WHC aspires to be Salem’s first AAM accredited museum.
- WHC will be a significant caretaker of local archives and collections, developing partnerships with area organizations that value this service
- WHC will be the place local residents want to bring their guests...*first*
To achieve the vision, WHC will:

- Explain the past to those who are making decisions today
- Facilitate our communities’ telling, retelling and reflection on our stories
- Be a vital part of the community’s intergenerational and intercultural fabric
- Reach out to a broadly representative cross-section of peoples across the Willamette Valley
- Be a leader in the heritage community, energizing communities to further promote the value of heritage
- Develop an extensive portfolio of active and fruitful partnerships that help tell our community’s complete history
- Keep history relevant, capturing history as history is “being made”
- Preserve, interpret and champion the unique and historically significant buildings and collections in our care

WHC Promises

- **ENJOYMENT:** “We always have a great time when we go.”
- **VARIETY:** “There’s always something new to see or do.”
- **AUTHENTICITY:** “The people there are knowledgeable, and share well researched facts in a compelling way.”
- **TRADITION:** “WHC preserves and carries forward what matters.
- **CARE:** “WHC is welcoming, accessible, well-cared for and friendly.”
- **CONNECTIONS:** “WHC enlarges and enriches an understanding of life.”
Willamette Heritage Center Strategic Goals

1. **Increased community involvement** by partnering with individuals and organizations, increasing education, visitation and participation.

2. **Increased visitor enjoyment and expanded repeat visitation:** Create a more visitor-centered environment in all aspects of operations.

3. **Well-preserved and maintained** WHC’s historic treasures while assuring responsible access.

4. **Diverse funding sources and larger annual budget revenues** while maintaining accountability of expenses.
**WHC Strategic Objectives and Change Initiatives**

To pursue the four WHC Strategic Goals, the organization will focus energies on the following seven 2010-2013 strategic objectives (change initiatives). Supporting each strategic objective is a summary of key strategies WHC will pursue. The outline action plans are presented in greater detail in the expanded Strategic Plan explanation.

**Strategic Objective 1: Strengthening the WHC’s Human and Community Capacity**

Build additional structure and new agreements to strengthen the cooperative and complementary team of staff, Board, volunteers, partner organizations and the entire WHC and heritage stakeholder communities.

**Key strategies:**

- WHC will build effective connectivity and community between staff, Board, donors, members and volunteers.
- WHC will invest resources to strengthen management practices, planning, decision-making and idea-assessment processes that encourage continuous improvement and adaptation of plans. New job descriptions and reporting structures will clarify responsibility and authority, and will identify roles for Board, staff, contractors and key volunteer positions.
- WHC will develop consistent annual and long range planning and budgeting and improve fiscal management to provide increased financial tracking to measure, assess and learn from results.
- WHC will build mutually beneficial, permanent alliances and programming relationships organizations and groups such as the City of Salem, Willamette University, Grand Ronde Confederated Tribes, *Statesman Journal*, and Salem-Keizer schools.
- For all involved in making WHC “work” (Board, staff, volunteers, partners and partner organizations), staff will clarify roles and responsibilities, accountability, supervision and management.
- WHC will invest in strengthening volunteer engagement with heritage including training, teambuilding and gratitude. The volunteer “program” at WHC will become a model for the community, joining all sections of the WHC organization to build close personal relationships as each volunteer “finds his/her place at WHC”.

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Strategic Objective 2: Strengthen WHC’s Visibility in the Community
Gain widespread visibility through strong and vital branding by the end of 2012.

Key strategies:
- As the Interpretive Plan connects to community needs, the new brand will be generated from a new analysis of the benefits the community can derive from WHC and the promises the organization makes to the community.
- WHC will deliver the new brand messaging through strategically planned marketing campaigns for membership, member communications, and for all primary events and programs.
- Target markets will be identified to focus marketing messages and strategies on specific community needs/desires. Marketing and communications planning will be a well-planned, well-integrated and well-implemented WHC activity.
- WHC will invest resources to expand use of social media, information technology, e-marketing and website, encouraging its supporters to help “spread the word”.
- Program budgets will include marketing, and will connect to the marketing expenses to achieve revenue and attendance goals.
- WHC will both measure and learn from results.
Strategic Objective 3: Enhance WHC’s Business Plan
Continually increase earned revenue through entrepreneurial annual events and other business activities.

Key strategies: New and focused business plans will be developed where there is significant opportunity. Each specific plan will outline the investment of resources, and will project the resulting increase in earned or unearned income for a particular product or program offering. Primary opportunities for business planning and revenue development are listed below.

1. Increased “home away from home” repeat rental customers: Government and business meeting rentals; family event rentals, annual school event rentals
2. Expand weeks, numbers and professionalize summer camp(s)
3. Archival services for organizations
4. Develop research and organizational WHC memberships (for research support/services)
5. Create Seasonal Family Festivals,
6. Increase membership and major donor campaigns with incremental income growth year-by-year
7. New adult education programs offerings
8. Heritage services for individuals and families
9. Heritage Outreach services, including long-range development of WHC History Tours
10. The Textile Learning Center
Strategic Objective 4: Strengthen Membership Services and Development

Substantially increase the funds raised annually through development: memberships, grants, fundraising events, annual campaign/major donors, corporate/business sponsorships.

Key strategies: The customers-first attitude towards serving members and donors will be WHC’s highest priority. Members and donor services will be central to all future development activities. The annual development and membership calendar will be completely integrated with the programs and exhibits calendar. Increased fundraising income will be generated through these priority activities:

1. WHC will repackage its membership program based upon a re-examination of “what different types of people wants and needs.”
2. A realistic grants calendar will be developed to help with the WHC’s Interpretive Plan. Any capital grants will be driven by the WHC Site Plan.
3. A new Board group, the Strategic Advisory Group, will work year-round (with goals, targets and a plan) to secure a broad base of major donors. This group will with of non-Board stakeholder-leaders recruited for their commitment to the new WHC vision.
4. The Strategic Advisory Group will help the WHC with strategic guidance on developing closer community partnerships.
5. A consistent, insistent and quietly visible year-round planned giving campaign will communicate simple, user-friendly ways your current, members, donors and key stakeholders can share their resources to support WHC’s new future.
6. WHC will restructure its business sponsorship opportunities focusing mutual marketing and community relations benefits.
7. The WHC fundraising events (Spring Heritage Awards and Fall Event fundraiser) will be further developed and integrated with the year-round development calendar to improve membership and donor participation.

WHC will aim to be a “must join” organization, especially for educated area families with young children.
Strategic Objective 5: Improve Visitor Services
Identify priorities, measure results and continuously improve to insure visitors have a positive experience that they value.

Key strategies: WHC will do less, not more programming, and will seek to improve impact of the calendar of highly visible, regular annual events that become even more attractive as “family and community rituals”. The entire WHC calendar of exhibits and program development will be projected five years’ out, with far-earlier program commitments that allow time for grant writing, sponsorship development, integration and partnership-building. Goals, tracking, measures and marketing will focus on these areas of service/programs for the public:

- **Community Use:** for rentals, leases, events, meetings, photography sessions, nonprofit fundraisers, etc.
- **Community Visits:** to feed the ducks, visit the grounds, shop, gather information or eat.
- **Family Festivals:** seasonal events that could expand in scope over time as it is determined what works and what draws.
- **Exhibit Visits:** Permanent and Changing exhibitions.
- **Onsite Adult Programs and Education:** including *History Visits* to attend programs, to attend classes, workshops or conferences; and *Textiles Visits* to weave, knit, spin, attend guild meetings, demonstrations, events, sales, weave or take classes. *Heritage Services:* Using/employing archives, collections and archival expertise to serve community, family, individual and organizational needs. *Identified services will be fee-based, and some provided as member benefits.*
- **Off-site Heritage Outreach & History Tours:** Continuing and expanding these activities and offerings where increased revenue results.
- **School Services** both on and off-site, including services provided to K-12 and college students and their teachers.
- **Onsite Youth “Camp” programs:** including youth camps, family programs in summer, group programs for Scouts/etc.; weekend and after school offerings
- **WHC Fundraising Events:** including Heritage Club, membership and annual events.
Strategic Objective 6: Enhances and Expanding the WHC Exhibitions
Develop and implement a centrally themed WHC Interpretive Plan.

A new, cohesive, centrally-themed WHC Site Interpretation Plan revises the institutions’ approaches to changing exhibitions, permanent exhibits in all three historic houses, the church, the mill building, the welcome/orientation center, and the grounds, as well as impacting the furnishing, machinery and object and story selection. The new Plan has been designed to be both useful and flexible, as ideas about how best to interpret the stories presented at the Center will continue to evolve.

Key strategies: The Interpretive Plan will:
1. Define and connect WHC’s intentions to community needs.
2. Create heritage themes that interconnect. Create a well-developed plan that ties history of the site to major historical themes and common human experiences.
3. Demonstrate why history is important as it explores the growth of the mid-Willamette Valley’s diverse communities and industries.
4. Focus and guide a strong new collections policy, and WHC’s exhibits, programs and community offerings.
5. Allow the WHC’s buildings to work harder by recommitting selected spaces to expand and connect themed, inter-related and expanded permanent exhibits, while at the same time encourages the reassessing and optimizing of access, display and storage of existing collections, archives and artifacts.
6. Emphasize the unique strengths of the Center’s history, collections and physical assets.
7. Expand public access and audience input regarding interpretation and presentation. Use visitor evaluations of newly developed interpretation to inform future programs.

- New themes of People, Families, and Community will interconnect in a new WHC Interpretative Plan. The exhibitions developed in conjunction with the Interpretive Plan will define and connect WHC’s intentions to community needs.
Strategic Objective 7: Maximize the Best Use of the WHC Campus

Develop and implement a Master Site plan.

A master site plan will be developed to improve access and use of existing buildings and grounds.

Key strategies:

- A WHC Master Site plan will respond to the new Interpretive Plan, and will integrate multiple, interlocking WHC priorities in a simple, adaptable, user-friendly map that helps stakeholders envision the future.
- Preservation of historic structures will remain an essential priority.
- Improved, climate controlled storage for archives and collections will be addressed, and the Site Plan will identify how WHC intends to display high-value artifacts currently in storage.
- The Master Site plan will map near-future improvements that could include an outdoor family-friends space.
- These near-future improvements will be sited within longer-range WHC expansion scenarios that could possibly include a new Visitor Center to house a new exhibit hall/long house, greeting center and improved classrooms.
WHC Transformation Process
As Willamette Heritage Center continues to settle in post-merger, the organization will intensify its partnership with key stakeholders and the community. It is critical to WHC’s future success that more people become involved more deeply.

Between summer 2010 and winter 2013, implementing this strategic plan will move through four overlapping phases. The first 18 months are mapped with quarterly action plans in the appendices here, and budgeting for FY11 (beginning in January 2011) is now underway. A reformed annual planning and budgeting process (July-November of each year) will include review of accomplishments to date and “re-setting” of action plans for the upcoming fiscal year. Quarterly, staff and Board will review progress against the Plan’s measures of success.

This strategic plan is based upon reasonable scenarios, but the future is unpredictable. Each phase of implementation will require different and new levels of community support, new resources/investment and expanded organization capacities. If resources are not secured, or if the development of new organization capacities lags, the plan will be revised.

Phase One: Launch & Planning
Merger accomplished. Develop the 2010-2013 strategic plan; align Board and staff behind vision, goals and objectives/change initiatives. Establish agreements with staff and Board. Early capacity building is accomplished: computers, data base development, financial systems. Staff integration and new offices are set up.
Phase Two: Transforming WHC Financial Operations & Stimulating Revenue Development

This Strategic Plan has been articulated in 2010-2011 action plans related to each of the following “WHC business centers”. These action plans, developed by staff teams and informing the 2011 budget, are included in the extended version of this Strategic Plan.

- Fundraising and membership
- Marketing & communications
- Master site planning
- Interpretive plan & exhibits
- Libraries-archives-collections
- Volunteers
- Education programs
- Financial management, budgets & planning
- Information technology
- Rentals & leases

Phase Two implementation, guided by the action plans, will: Track and measure progress against goals throughout the year. Develop, pilot and refine new ways to increase revenues/public service: planned giving, exhibit openings, Heritage Club, membership, program marketing, volunteer program expansion, rentals marketing, event services and event marketing.

1. Secure seed investments to fund organization growth, including investment from reserves, new multi-year major donor pledges and foundation grants, new corporate sponsorship program. Capital fundraising for new permanent exhibits and to support master planning.
2. Invest in people: WHC will re-envision a new organization structure, and redefine staff responsibilities and assignments to meet new roles described in the strategic plan. Intention will be to:
   a) Incrementally increase staffing levels where doing so will lead to increased revenues;
   b) Use paid contractors in areas of maximum benefit (financial management/system redesign, rental/sales; summer camp project management; outreach services provider;
   c) Employ hands-on consultants to plan, train and expand staff knowledge/capacities in areas of revenue generation: marketing, development, and information technology;
   d) Expand the range of skills, contacts and expertise on the WHC Board;
   e) Recruit non-Board committee members and key leaders from the community who have stepped forward during strategic planning;
   f) Secure exceptional and committed long-term in-kind professionals to guide new activities (master planning, exhibit design, accounting);
g) Develop the best volunteer program in the county, engaging people who love history, love the Mill, and/or love the community in meaningful volunteer jobs that meet their individual passions/needs.

3. Embrace expanded responsibility to interpretation. Begin implementing the new interpretive plan, and develop a master site plan.

4. Define and communicate the new promises WHC is making to the communities it serves. Develop and consistently employ the new WHC brand, strategically planned and implemented marketing campaigns. Plan/launch a new website and new strategies for IT-driven marketing, sales and services.

5. Develop & launch new membership program and year-round integrated campaign.

6. Establish/contract for mutually beneficial strategic alliances with Willamette University, City of Salem, Travel Salem, Statesman Journal, Salem Keizer School District and Grand Ronde Tribes.

**Phase Three: Expanding Impact of Programs and Projects (2011-2013)**

- Redesign Sheep to Shawl and Magic at the Mill as two of four seasonal revenue-generating Family Festivals.
- Develop and expand summer camp programming.
- Developing fundraising events to expand revenues.
- Develop and pilot partnership programs and projects.

New website launched and expanded IT-based marketing techniques piloted. Continuing improvement to membership campaigns and services. Redesign school services. Implement Interpretive Plan with permanent exhibit redevelopment(s) and raise funds for further master plan and site development.

**Phase Four: Longer Term Capital Investment (2012-forward)**

Accomplishing this strategic plan and its objectives/change initiatives to position WHC for a future capital campaign. Fund a new building (visitor center, exhibit space and classrooms) and substantively improve the quality and capacity of WHC exhibit, education and storage facilities.
Willamette Heritage Center: 2010, The Founding Year
Current situation, community input and primary community themes & needs

The Willamette Heritage Center (WHC) was forged from the merger of two respected organizations, the Marion County Historical Society (MCHS) and Mission Mill Museum (MMM). To explore this possibility, representatives from both Boards met throughout the summer and fall of 2009. The members determined that the organizations were quite complementary, both having strong programs, with MMM having award-winning community programs and exhibits and MCHS having significant archival and research library holdings. The two were located on the same site, have partnered for many years and have cooperated towards their overlapping missions in many ways.

Independently, MCHS operated as a respected history museum for sixty years and Mission Mill Museum for forty-six years. The former collected, interpreted and exhibited Marion County history and played a significant role in preserving many historical structures, including those of the Methodist Mission to Oregon and the Thomas Kay Woolen Mill. In these historic buildings, Mission Mill Museum was created to interpret their role in early Salem for the public. Both institutions made significant commitments to include the archival history of the Kalapuya, the Valley's first people.

After careful consideration, both Boards recommended unification, with the understanding that a combined institution, with a newly combined mission, would strengthen the community through expanded programs, exhibitions, research, collection care and operating efficiencies. The Willamette Heritage Center became official on January 1, 2010.

Research Summary
The current state of the new Willamette Heritage Center was examined through multiple surveys, stakeholder interviews and public forums.

The WHC Finance Committee and Advancement Committees undertook an examination of the new organization’s current financial state, including an articulation of reserve, endowment and foundation accounts and an informal audit of accounting and bookkeeping procedures and reports. A summary of primary themes was articulated, analyzed and considered by the Board and staff in developing the value proposition, goals and objectives of this Strategic Plan.