Orange County Historical Society

Strategic Plan

2022-2027

Strategic Plan Task Force

Original: 18 January 2022

Latest Revision: 26 March 2022

Table of Contents

Vision Statement

The Orange County Historical Society aspires to be an active, well-run, central source of accurate and readily accessible local history for researchers and the general public.

Virginia Governor Spotswood   **James and Dolley Madison**

Mission Statement

The Orange County Historical Society is a research, archival, and educational organization dedicated to the discovery, preservation, and dissemination of the history of the people, places, organizations, and events of Orange County and the surrounding area.
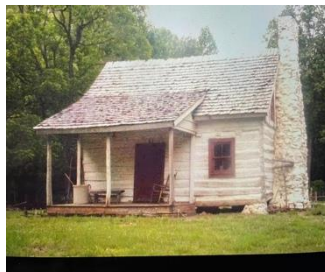
Gilmore Cabin on freeman George Gilmore's farm adjacent to Montpelier Plantation

Preamble: 5-Year Strategic Plan Executive Summary

Established in 1965, the OCHS has undergone several periods of transformation to continue accomplishing its mission.   With changes in technology, space limitations, resource pressures and increasing constraints on volunteer time, the February 2021 Board of Directors (BOD) meeting appointed a 5-Year Strategic Planning Task Force (Task Force) to recommend a plan for moving us forward through this next period of transformation. Central to that discussion was a focus on whether our 43-year-old building adequately addresses future space needs.

President Ray Ezell appointed Bill Speiden as Chair of the Task Force with Clara Colby, Mike Saxton, Bernice Walker, Frank Walker, and Joe Wayner as members.   Beginning in March 2021, the group met 28 times, and completed its work in January of 2022. The chairman routinely invited board members, committee chairs, staff, and interested members to attend and participate. A number offered valuable feedback ensuring that the final document reflects input from a broad constituency of stakeholders.

The Task Force first reviewed and refined the Society's Mission Statement and created a Vision Statement. Subsequently approved by the BOD, both offered guidance for the committee's work.

The goals presented are not prioritized nor are completion dates assigned since the Task Force recognized the need for each group responsible for an area to finalize its own work plan. However, some areas did emerge as clear urgent needs providing opportunities for "early wins".   They are noted with "ASAP" under their action timelines.   Two areas were identified as urgent in that they enable other areas.   The first, technology, is fundamental to much of our work and has been pulled together from throughout the plan into one separate technology set of goals.   The second area is the need for volunteers, who must also have the technology support necessary to succeed.

In addition, the Task Force would like to focus the BOD's attention on Collections where all four goals are considered urgent priorities affecting space planning with an opportunity to break a long-standing logjam.   This in turn necessarily also involves Buildings & Grounds because once the Collections goals above are addressed, there will be significant new space requirements. Past efforts to address some of these Collections issues have failed due to a lack of funding, so Finance is another key area where fundraising is part of the solution.

Finally, it is important to note that this plan is a statement of intent by the BOD. In it the BOD explains its goals for the Society's future and suggests actions to implement said goals. It provides guidance to the BOD, the staff, and members as they shape the Society's future. Utilized as a resource, it should not bind, prohibit, or limit the BOD in performing its duties.   A 5-year-strategic plan is never set in stone and should be thought of as a fluid document to help focus the Society on its Vision and Mission statements.

My thanks to the committee for all their thoughtful inputs making this plan a reality.

Respectfully submitted,

Bill Speiden, Chair
5- Year Strategic Planning Task Force

History of Revisions

26 March 2022:

1. Board of Directors at Strategic planning retreat moved Technology Goal 12 Action 1 to "Redesign website" to Outreach Goal 2 Action 1.
2. For the purposes of prioritization, Collections Goal 1 to make available already scanned resources is considered a part of Goal 3 but will not be rolled into it within this existing document.

Strategic Plan Goal Prioritization

2022-2023 Period

Board Retreat 26 March 2022

Rank	Goal	Weighting
1	Outreach Goal 2: To increase outreach to members and the community.	30
2	Membership Goal 2: To increase member participation	23
3	Finance Goal 1: To increase income from current sources.	18
4	Bldgs & Grounds: Goal 1: To provide adequate space to support the needs of staff, collections, and researchers while fulfilling the educational goals of the Historical Society.	12
5	Outreach Goal 1: To increase the reach of our programs by equipping the auditorium for simulcast and archiving live presentations.	11
6A tie	Board & Staff Goal 1: To ensure operational excellence and continuity to maintain the Historical Society's grounds, building, collections, and equipment.	9
6B tie	Collections Goal 4: To develop and apply processing, conservation and protection procedures compliant with the collection management policy.	9
8	Collections Goal 3: To facilitate public access by organizing, inventorying and digitizing suitable collections. This now includes Goal 1 to make available to researchers the already scanned local history vertical files by means of an on-site public access computer.	8

Weighting based on assigning points on a 5 point scale correlating with top 5 choices of each board member and adding up the total.

Board and Staff Administration

Goal 1: To ensure operational excellence and continuity to maintain the Historical Society's grounds, building, collections, and equipment.

Action	Completion Date	Comments
1. Improve communication with members regarding the activities of the society.	TBD by BOD	Briefly summarize current efforts at programs and meetings.
2. Examine ways to increase efficiency for staff.		More focus on process and procedures that optimally integrate volunteer and staff efforts as a team to accomplish the variety of tasks needed.
3. Explore possibility of hiring an executive director.		Start by writing a job description
4. Review committee structure, function and recruitment to address current needs.		
5. Develop guides and maintenance schedules for mechanical and IT systems.		Mechanical (HVAC, plumbing, electrical, security) and IT.. Coordinate where appropriate with Buildings and Grounds,
6. Develop key area procedure guides.		Examples include treasurer, front office, etc.
7. Update security system to incorporate video monitoring based on current best practices.		Coordinate as needed with Building and Grounds.
8. Develop and implement a standard IT office equipment and software upgrade plan.		Consider open source software options
9. Review and/or adopt any policies that represent good governance for boards.		While some policies are currently handled at the committee level, a clarification per non-profit good governance standards should be made as to which policies also need formal board review. Examples may include record retention, collections, endowment and gifts, fiscal and investment policy and/or others. Board Source would be a good reference for best practices.
10. Recruit Volunteer Coordinator		Duties and compensation TBD by Board
11. Develop internship program		Duties and compensation TBD by Board for high school and/or college internships.

Note – not rank ordered

Buildings and Grounds

Goal 1: To provide adequate space to support the needs of staff, collections, and researchers while fulfilling the educational goals of the Historical Society.

Action	Completion Date	Comments

1. Create a task force whose assignment would be to:
  a. Plan for space needs while balancing the requirements for protection and preservation with full accessibility. The order of priority should be:
    i. Protection from loss, damage and destruction
    ii. Preservation
    iii. Accessibility
  b. Identify temporary solutions for some of the current space problems.
  c. Redesign the interior space for long-term, permanent solutions.
	ASAP
	
	Short Term Solutions 3Q22
	
	Long Term Design 2Q23
		- The intent is for the short term temporary plan to redesign within the existing footprint at minimal cost while the long term design should not be limited by either short term redesign or the existing building footprint.
		
		- Both short term and long term planning efforts are anticipated to run in parallel as they reflect an iterative process where one affects the other
		
		- The long term design, among other things, should address staff work space, researcher work space (including multiple Public Access Computers), space for reference books, documents, maps, sale items, an auditorium, kitchenette/refreshment storage, bathrooms, janitor supply, IT and an office for a future executive director.

2. Visit similar organizations to see how they have used their space.	4Q22	We can learn from others. The Task Force in particular should visit other organizations accompanied by any interested volunteers or staff.

Goal 2: To develop and implement landscaping plan that utilizes space more efficiently as a mission asset rather than simply something to maintain.

Action	Completion Date	Comments
1. Work with the Master Gardeners to design, fund and install an updated landscape plan.	By 2Q22	The current heritage garden proposal from the Master Gardeners program will largely fulfill this. If the long term building design does not utilize more of the existing landscape, then consideration should be given to creating an outdoor area for educational programs when weather permits.

Collections

Goal 1: To make available to researchers the already scanned local history vertical files by means of an on-site public access computer.

Action	Completion Date	Comments
1. Appoint a task force or subject matter expert to identify the technology solutions needed so the already-scanned local history files can be accessed by computer.	ASAP	Quick win to figure this issue out. 90% of these are the Family Files but some other files have also been scanned.
2. Present the Board with a list and cost associated with this goal.	TBD Task Force	This should include at least 2 on-site public access computers (PACs)
3. Explore funding options to pay for this goal.	TBD Task Force	If action 1 completed soon, this could be part of 2022 fund drive/member renewal
4. Archive local history TIFF files in a permanently protected manner and migrate to new technology as needed.	TBD Task Force	They should be stored in 3 different locations one of which should be in the cloud.
5. Convert archival local history TIFF files into more accessible PDF notebooks available for public use	TBD Task Force	Large single page TIFF files made for archival purposes can also be converted into more accessible PDF for easier access.
6. Digitize family history file documents accepted since completion of original scanning project.	TBD Task Force	There is a cumulative stack of documents received over the last five years since the completion of the scanning project that have not been scanned nor integrated into the existing files. Moving forward, this needs to be handled on an ongoing basis.

Goal 2: To update the library collection.

Action	Completion Date	Comments
1. Re-establish a library committee to develop and manage library collection policy and procedures	ASAP	The library collection consists of all resources that in their original form were published or unpublished books or booklets.
2. Define core library collections	TBD by Library Committee (LC)	Examples might align with Mission to include Orange County People (Genealogy, Native American, African American, etc.), Orange County Places (Towns, Hamlets, Houses, Churches, Dams, etc..), Orange County Events, Orange County Businesses & Organizations. TBD.
3. Update library inventory to reflect reorganized sub collections.		
4. Reorganize current library collection per new collection areas	TBD by LC	This can begin before library committee is fully functional with early volunteers. Our library has become disorganized and out of date where we need to avoid analysis paralysis and get on with the work.
5. Recommend how to apply CMP to library collection	TBD by LC	Most materials in the library collection do not have the intrinsic value warranting CMP level of management. However, some books are very valuable rare items in need of complete CMP protection.
6. Dispose of books no longer needed	TBD by LC	Consider all options appropriate for books
7. Update finding aids	TBD by LC	The current finding aids found on the main conference table - cemetery notebooks, Clerk's office record records, etc.

Goal 3: To facilitate public access by organizing, inventorying and digitizing suitable collections.

Action	Completion Date	Comments
1. Appoint a task force to facilitate this goal.	ASAP	Recommend inclusion of Collections Committee member.
2. Publish existing inventory lists on the website with a hardcopy notebook finding aid onsite for researchers.	ASAP	Comment - Added per our discussion that this can be an immediate win. They exists today but are used exclusively by staff rather than being made available to the public.
3. Select and acquire software and hardware that is the most appropriate for the Orange County Historical Society.	TBD by Task Force	Excel is currently being used for inventory records where they exist. The OCHS bought Past Perfect which is also used by the JM Museum some years ago but has not used it. While these are currently owned, do not be constrained by past decisions.
4. Identify the sub collections within the permanent collection and reorganize as needed.	TBD by Task Force	Examples might include, microfilm, library, artifacts, maps, family files, newspapers, Orange County Clerk's Office Records.
5. Update current inventory lists and create inventory lists for sub-groups for which lists are not currently available. This includes creating a more detailed catalog for select sub-collections where appropriate.	TBD by Task Force	This does not mean separate lists as we would encourage one inventory list to maintain or it gets too complex. Sub collections can be handled by an additional field in the inventory so it is easy to select a subgroup as needed. By catalog we mean a searchable keyword list or descriptions that are finding aids to content. We believe an actual index of our collections is far beyond the scope of our current volunteer efforts at this time.

6. Review existing backlog of acquisitions for potential acceptance and either accession and inventory or dispose of per CMP policy.	TBD by Task Force	This is a critical logjam to break consisting of "new stuff" that has accumulated for a number of years that has never been "processed" beyond a Deed of Gift.
7. Make a policy decision about the level of internet accessibility of digital archives.	TBD by Task Force	Consider protection of private information, what should be behind the member wall and other financial aspects of internet accessibility.
8. Digitize suitable materials most susceptible to loss or degradation	TBD by Task Force	
9. Create scanned public access version while removing any remaining non-library originals from public access in the permanent collection.	TBD by Task Force	Secure services of a qualified IT person as needed. The method of access (onsite vs internet) will be governed by the policy decision regarding internet access.
10. Re-evaluate items in existing collections.	TBD by Task Force	This is intended to determine if items still meet the criteria for inclusion in our collections or whether they should be removed by appropriate means.

Goal 4: To develop and apply processing, conservation and protection procedures compliant with the collection management policy.

Action	Completion Date	Comments
1. Appoint a task force to facilitate with this goal.	ASAP	
2. Finish the collections management policy if not previously approved.	ASAP	
3. Consult professionals in museum/library science for best practices to minimize handling of non-book materials by researchers.	TBD by Task Force	This can run parallel with other procedure development
4. Dedicate space and identify equipment needs for collections processing	TBD by Task Force	
5. Develop a plan for storage of materials to protect them from loss, damage or destruction.	TBD by Task Force	Under purview of Collections Committee This is to consider storage environment and physical security from theft to include but not limited to: • Investing in archival storage materials • Reorganizing research and staff areas • Installing camera(s)

6.   Develop or revise forms required per CMP
    a.   Donation Form/Deed of Gift Form
    b.   Temporary Deposit Receipt Form
    c.   Deaccession Form
    d.   Loan Agreement Form
	TBD by Task Force	

7. Develop specific procedure to review acquisitions for possible accessioning per alignment with principles of CMP.	TBD by Task Force	The procedure needs to minimize dependency on staff historian.
8. Process new materials according to procedures developed when inventorying the permanent collection, adding them to the applicable sub-category and screening out unwanted materials.	TBD by Task Force	This is distinct from the backlog of unprocessed materials we currently have that need more immediate attention.
9. Develop procedures that the staff will follow for use of materials onsite by researchers.	TBD by Task Force	Example: Should they hold the researcher's driver's license until all materials are returned to staff?

10. Train staff and volunteers; including the development of instructional manuals, as needed per the CMP requirements.	TBD by Task Force	Excellent recent example – Jayne developed the instructions for the new microfilm reader.

Education

Goal 1:   To increase support of Orange County social studies teachers, in both public and private settings, utilizing Orange County history as a paradigm of the nation's history.

Action	Completion Date	Comments
1. Offer free membership for current Orange County social studies teachers	On going	Inform and potentially involve teachers in Historical Society programs, library and archives as opportunity presents itself.
2. Provide curriculum-aligned OC history resource development support		Continuation of initial effort to have volunteers respond to requests for resource or research support. Resources that are developed upon request are then added to the resource library.
3. Provide curriculum-aligned OC history educator's resource library		Continuation of current web based resources along with possibly printing a compendium or index of educator resources. Additionally, hands-on teacher-student kits with artifacts could be developed potentially in collaboration with the James Madison Museum.
4. Determine if there is a way to monitor web use of educator resources.		In order to better prioritize resource development we need feedback on current use.
5. Provide more intensive resource and volunteer guest speaker support to historical special interest units upon teacher request.		Walking tours, bus tours, classroom guest speaker. Examples might include a unit on Native Americans, genealogy, Germanna, Civil War, or a variety of topics we could collaborate with the Orange County African American Historical Society on.
6. Promote benefits of teacher memberships		Re-engage secondary and elementary directors of education, distribute a benefits reminder item that is useful to teachers (bookmark, an Orange Co history book with benefits in front cover, etc.). It is especially important to time communications with teachers to occur at a time convenient for their schedule, i.e., the summer or designated days of staff development set by the school system.
7. Develop continuing education activities certified for CE credit in Orange County history.		Examples include conducting a summer workshop for social studies teachers, creating a scavenger hunt, reinstate OC history bus tour, offer overview of OC history to new hires.

8.	Recruit a current social studies teacher to serve on the committee.		Note that "social studies" teachers is considered the more inclusive term that includes solely dedicated "history" teachers along with others who include history as part of "social studies".
9.	Leverage education support of public schools in other Historical Society grant development efforts.		Many of these activities can either directly or indirectly benefit grant development.

Goal 2: To increase student engagement with the history of Orange County.

Action	Completion Date	Comments
1. Provide community service opportunities		Examples include website work, digitizing records, scanning projects, creating a scavenger hunt or driving tour for others, hands on engagement in activities like the Little Petersburg Fisherman's Lodge cemetery cleanup. Approach honor societies to promote opportunity.
2. Create a summer internship		Extension of community service opportunity. Is there a possibility for using this as a tool for teachers who would award independent study credit?
3. Create activities that increase interest in Orange County History		Examples include Geocache trail, creation of virtual field tours of OC sites, conducting oral history interviews with older family members or citizens (perhaps in conjunction with local churches), offer walking tours and/or bus tours
4. Explore conducting student interest survey		Is there a mechanism to survey student interest regarding what they would like to learn (houses, people, schools, bridges, waterways, war activities, civil rights)
5. Explore potential creation of a scholarship and/or award program for students with an active interest in history.		As funds permit. Note that the Fluvanna County Historical Society has provided a small scholarship (Jesse Hunt Award - currently $500) for many years.

Finance

Goal 1: To increase income from current sources.

Action	Completion Date	Comments
1. Increase grants from Town and County		President delegate person to approach town and county contacts.
2. Expand grant writing to other sources		Ex: Foundations, companies Consider grant writers. Note Louisa Co Hist Society recently received a $40k technology grant.

3.   Increase income from endowment
   a.   Continue to invest in high yielding stocks, preferably with growth potential
   b.   Do not keep more than 6 months budgeted expenses in non-yielding equities.
   c.   Maintain the diversity of investments
		b. At 2% or less interest we are losing value due to inflation alone

4. Develop a monetary gift acceptance policy.		We need to consider whether offered gifts are consistent with our vision and mission statement.
5. Develop estate planning program.		Consists of both lifetime charitable giving and estate bequests. Advertise via newsletter, Orange Oracle and local media. Include the "How" in articles.

6.   Increase income from annual fund drives.
   a.   Refine donor database.
   b.   Review procedure for acknowledging   donors.
   c.   Send out dues letter in Sept rather than Oct to allow time for follow up.
		Donor relations also include attention to past donors.
		
		This applies to the previous "generic" fundraising efforts as well as the new "specific project" effort passed by the BOD in Oct 2021.

7. Consider establishing a fee schedule for services.		Also make distinctions between members and non-member services
8. Increase sales of publications		One possibility would be to establish a monthly/bi-monthly "book of the month" and "CD of the month" column in local media with title, subject, short description of content. A good project for member and/or BOD volunteers.
9. Consider having fundraising events.		Ideas include annual book sale to reduce bookstore overstock, conference, silent auctions, etc..

Goal 2: To raise sufficient funds to construct and/or remodel needed space as determined by Buildings and Grounds Task Force.

Action	Completion Date	Comments
1. Design a Capital Fund Drive		

Goal 3: To secure additional funding for staff.

Action	Completion Date	Comments
1. Secure sufficient funding to cover staff pay increases and additional staff as needed	Annual	

Goal 4: To develop an annual budget.

Action	Completion Date	Comments
1. Finance committee to develop an annual budget and present it to the BOD for approval.-	Annual	

Membership

Goal 1: To increase membership.

Action	Completion Date	Comments
1. Conduct periodic member survey to align Board priorities with member interests.		1/3rd of members should be surveyed annually
2. Establish consistent definition of "active membership".		As recently as 2Q21, anyone paying dues within the last 5 years was considered a member. It currently stands at 2 years with intent to make it current for the 2022 membership campaign.
3. Offer new membership support level options including a return to Lifetime Membership option.	4Q21	
4. Apply new definition of active membership to a member renewal campaign targeting lapsed memberships.	1Q22	
5. Assess membership record needs to determine if Excel provides enough flexibility versus an actual web based membership software package.		Current system is 100% staff dependent rather than members maintaining basic record. We currently have limited ability to capture history, volunteer efforts or interests over time. A web based package would allow new members to signup, update and pay dues.
6. Assess opportunities and synergies of a potential joint membership model with collaborative local historical membership groups or organizations.		Examples: OCAAHS, JMM, Historic Gordonsville, GW Carver, CW Roundtable, OC Metal Detectors, Germanna, VA Gen Soc, DAR chapter, etc.
7. Develop accurate snapshot membership statistics and goals report that clearly and succinctly communicate status to Board.		Board will benefit by snapshot of where membership and retention rates stand over time relative to goals. Using a color coded (red, yellow, green) dashboard approach, set goals to monitor.
8. Develop member benefits package and succinct message to communicate benefits		A "brochure" might only exist on the web with the only print items being reminder items more likely to be kept like post card mailers, bookmarks, calendars, etc.. Reminder items would include summary value statement (branding/positioning) and link to more detailed member benefits "brochure" page.

9. Recruit new members through dissemination and advertising of member benefits through various distribution channels.		Distribution channels may include BOD, staff, members, social media, traditional media, events, real estate agents, Chamber of Commerce packet, etc.
10. Build public awareness of OCHIS via effective utilization of social media and reporting in local media to advance membership goals.	Now	Use sales of bookstore items and event announcements as additional opportunities for engagement.
11. Consider special events as an additional means of public awareness	As interest materializes	Research and/or special interest seminars (care of old houses, genealogy, Civil War, etc.). Consider collaborating on events with other groups like the museum, OCAAHS, or Arts Center. Note the museum already has its plant sale, antique id and the Arts Center has art exhibits, programs and hands on art classes
12. Continue free teacher membership		Repeated in Education goals

Goal 2: To increase member participation.

Action	Completion Date	Comments
1. Secure a volunteer coordinator and/or update existing job descriptions to include coordinating volunteers.	ASAP	
2. Develop volunteer recognition program.	1Q23	
3. Develop special interest groups that align with key reasons people join.		Ex: Family History, Civil War, History Book Club, Historic Sites, etc.
4. Combine events with other groups having mutual interests		Other local historical societies, museums, garden clubs, Art Center, etc.
5. Increase non-board member participation in all committees		

Outreach

Goal 1: To increase the reach of our programs by equipping the auditorium for simulcast and archiving live presentations.

Action	Completion Date	Comments
1. Determine AV needs in order to equip auditorium for simulcast and archiving of programs.	ASAP	
2. Determine type and design of program backdrop	Nov – Dec 2021	Ideas include OC logo screened on wall hanging
3. Create project plan that can be used for fundraising appeal	Jan-Feb 2022	
4. Raise funds	April	
5. Install auditorium AV upgrades as needed and fundraising efforts allow		

Goal 2: To increase outreach to members and the community.

Action	Completion Date	Comments
1. Redesign website		In coordination with committees
2. Increase engagement on Facebook and other social media		

Programs

Goal 1: To provide interesting and informative programs.

Action	Completion Date	Comments
1. Recruit and engage an active Program Committee.		Ideally 3-5 people with a board member liaison. The chair for committees does not have to be a board member.
2. Continue monthly programs while expanding their accessibility.		Current plans to move towards a blended "in person and remote" simulcast along with archiving for later viewing will significantly expand accessibility.
3. Develop new program types.		Examples might include special interest topics, seminars or even hands on workshops. In the past examples were "How Old is Your House", "Dating Your Furniture", "DHR Historic Districts" and "What Do We Do With Grandma's Stuff?". Other examples may be "Caring for Your Family Collections" or many aspects of genealogy. Use existing resources to streamline development like SlideShare resources on protecting your family history found at https://www.slideshare.net/LKachurek/protecting-your-familys-history.
4. Use programs as an opportunity to update members on current activities of the society.		
5. Consider collaborative programs with other organizations with overlapping interests.		This has been done in the past with Germanna, OCAAHS, and Madison County Historical Society. Consider Friends of the Wilderness Battlefield, Greene County Historical Society and others with overlapping interests. Do not limit organizations to strictly historical ones as a particular topic like "Historical Landscaping" might interest local garden clubs for example.

Goal 2: Increase member and public awareness of programs.

Action	Completion Date	Comments
1. Work towards developing longer range program calendar.		Ideally a year in advance publicized at the Annual Meeting and through other communication channels. This should ideally include three picnics per year due to their popularity.
2. Adopt a registration model for virtual programs.		Programs can still be free but this allows the society to add potential new members to its email distribution lists and expand advertising.
3. Advertise public programs consistently		Submit public program plans to "Events" section in local printed and social media.

Publications

Goal 1: To inform the public through publications of the history of Orange County and the surrounding area.

Action	Completion Date	Comments
1. Review all policies and protocols associated with our Publications program.	2022	A variety of written and unwritten policies exist regarding how publications are approved and how sales of same are conducted. These should be reviewed, updated, codified, and approved by the BOD.
2. Continue to publish the newsletter semi-annually.	Semi-Annually	
3. Determine appropriate distribution list for the newsletter.	TBD	Currently sent to members, reciprocal Historical Societies, and selected additional recipients.
4. Continue to publish the *Orange Oracle*.	Occasional	Free to members who provide a valid email address and other interested parties. Continue to maintain the distinction between members and non-member emails in our records. Use *Orange Oracle* to expand the email list for new member campaigns.
5. Continue to publish and/or reprint books, CDs, DVDs, pamphlets, oral histories and other media as opportunities present themselves.	Material offered or solicited for publication handled as it is presented, on a case by case basis.	As new, acceptable material arrives and meets with established policies, the determination to publish or republish is made first by the Committee and if approved, is presented to the BOD for their action. Cost of publication should determine the retail price. Royalties to authors should not be encouraged, but should not disqualify a potential publication.
6. Establish succession plan for editors by adding additional members to committee.		
7. Review and improve the display of publications with the goal to increase distribution.		
8. Conduct inventory of retail publications.	Annually	Required for tax purposes. Consider labor saving options of reporting based on sales with less frequent physical counting.

9. Reduce the inventory of overstocked items.		Establish a goal of how many years of inventory based on sales we will maintain and reduce as needed to that level. Example: We have many decades of the Fanny Hume Diary in stock. Consider options like giving it out as a membership premium or with the next program involving Civil War history.
10. Increase distribution through special sales events and increasing off-site points of sale.		Consider starting an annual Christmas book sale and/or coordinating sales events twice a year with the newsletter. Currently the Art Center has a few of our books as a sales outlet where we only get paid when they sell a copy. Several other off-site locations purchase for resale (e.g., Montpelier, National Park Service).

Goal 2: To design long range publication projects.

Action	Completion Date	Comments
1. Identify gaps in published research topics that might appeal to potential authors.		Examples: History of the Fire Department, Rescue Squad, Sheriff's Office, Orange Town Police, Gordonsville Town Police, Utilities, compiled veteran's stories Paul Carter has written, etc.. The forward of *Remembering* is a starting point listing the additional need for histories of "churches, communities, educational systems, financial institutions ---- the list goes on and on." The idea to stimulate people with potential topics that fill research gaps. Our current "opportunistic" model where authors bring things to us remains the most common pathway. This "proactive" model builds on that by filling remaining research gaps we identify.
2. Solicit publication submissions from authors who will work under existing editorial review procedures.		Assure that potential authors understand they must adhere to the Society's editorial policy before proceeding with any agreement to publish.
3. Compile resultant publications for the Orange County tricentennial.	Before 2034	Consider a supplemental like *More Remembering* to *Remembering: A History of Orange County Virginia* or something that stands on its own. Also review existing publications like occasional papers for any that might fill gaps in a supplement. The main point is to prepare in advance for the 2034 tricentennial.
4. Consider pros and cons of publications, sales and inventory storage alternatives that impact the space requirements for the building, staff time, and revenue.		The Orange County Historical Society's "brand" is quality. That needs to be maintained.

Research

Goal 1: To conduct research relevant to the mission of the Historical Society.

Action	Completion Date	Comments
1. Plan and execute all ongoing and new research initiatives of the Society.		
2. Continual evaluation of new and existing archival/research holdings of the Society.		Essential
3. Recruit volunteers to pursue areas of priority research need.		
4. Provide research support to Education and Outreach committees		
5. Provide content for bi-annual research Newsletter and Orange Oracle		Use research projects write ups in our various publications.

Goal 2: To expand the research capacity of the Historical Society.

Action	Completion Date	Comments
1. Add general members to this committee		
2. Develop the research skills of additional members.		Through existing programs, special interest groups (SIGs), or dedicated skill development workshops.
3. Offer classes on how to research properties and people in the Clerk's Office to small groups		Provided we have the expertise and time to do so. Maybe charge for this or other classes.
4. Support any collaborative research efforts with outside organizations as appropriate		
5. Offer programs to include small investigative parties to explore sites		
6. Explore the potential for "crowd sourcing" research to engage more members and/or younger demographics.		Similar to citizen science apps, are there opportunities for crowd sourced historical research that in particular might engage younger volunteers? Examples might include historic site inventory projects, identifying unknown photos, etc..

Goal 3: To expand research dissemination.

Action	Completion Date	Comments
1. Explore options to host research seminars and/or conferences.		

Goal 4: Continue to provide research assistance to members of the general public.

Action	Completion Date	Comments
1. Develop policy on level of free research assistance.		Consider different levels for members versus nonmembers.
2. Develop policy on referral to fee-for-service researchers.		

Technology

Goal 1: To develop the level of IT knowledge required to implement and maintain organizational goals.

Action	Completion Date	Comments
1. Recruit IT specialist/webmaster to lead implementation/installation of technology needs.	ASAP	Includes hardware and software. This need is an essential organizational priority.
2. If volunteer IT specialist not found, hire an IT specialist as needed.		
3. Train committees/staff/BOD as needed		
4. Appoint a task force or subject matter expert to identify the technology solutions needed so the already-scanned local history files can be accessed by the public.	TBD Task Force	Collections. Quick win to figure this issue out. 90% of these are the Family Files but some other files have also been scanned.

Goal 2: To have sufficient up to date equipment to facilitate the mission of the Historical Society.

Action	Completion Date	Comments
1. Develop manuals/instruction sheets for tech use by staff, committee members and public, where appropriate.	On going	e.g. use of scanner, search programs etc.. This is currently Action 5 under Administrative goals
2. Replace older equipment/programs as needed and budget allows		This is currently Action 8 under Administrative goals
3. Develop maintenance schedules for mechanical and IT systems.		Admin coordinating as needed with Buildings and Grounds
4. Update security system to incorporate video monitoring based on current best practices.		Admin coordinating as needed with Buildings and Grounds
5. Develop and implement a standard IT office equipment and software upgrade plan.		Admin. Consider more affordable open source software options and staggering replacements.
6. Archive local history TIFF files in a permanently protected manner and migrate to new technology as needed.	TBD by Task Force	Collections. They should be stored in 3 different locations one of which should be in the cloud. The specific technology action might be to identify digital archiving standards to be used for collections preservation.
7. Select and acquire software and hardware which is the most appropriate for the Orange County Historical Society.	TBD by Task Force	
8. Assess membership record needs to determine if Excel provides enough flexibility versus an actual web based membership software package.		Membership. Current system is 100% staff dependent rather than members maintaining basic record. We currently have limited ability to capture history, volunteer efforts or interests over time. A web based package would allow new members to signup, update and pay dues.
9. Determine AV needs in order to equip auditorium for simulcast and archiving of programs.		Areas to consider include Outreach, Programs and Education

Note: Many of the actions above are duplicated under committees noted in comments to reinforce the need to collaborate.