



# Massachusetts Historical Society

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## MASSACHUSETTS HISTORICAL SOCIETY STRATEGIC PLAN 2008-2013

### Strategic Plan Summary, August 2010

The Board of Trustees voted to accept the Massachusetts Historical Society Strategic Plan 2008-2013 in March 2008. The Plan includes a refreshed mission statement, articulated vision and core values, and four broad, five-year goals. Over the next five years, the Society will strive to

- advance the stewardship and availability of its unique collections,
- increase the understanding of the relevance of history among its key audiences,
- increase awareness of its unique role and value, and
- build a broad institutional commitment to secure the resources essential to achieve its goals.

In addition to establishing these four broad goals, the Plan includes key objectives and strategies designed to help achieve the aims embodied in the goals. Benchmarks assure that the Society can measure progress towards its goals. The Plan is a “living document,” one that management, senior staff, and members of the Board of Trustees have the opportunity to work with and on over the years. While the goals will remain, many of the articulated strategies will need to be tested and refined to ensure success.

As a result of the continuing economic downturn and changing trends in both the humanities and independent research libraries, the MHS management, senior staff, and members of the Board of Trustees have undertaken an in-depth review of the Plan for the remaining three years, 2011-2013. Once any revisions to the objectives and associated strategies have been finalized, the MHS hopes to add that information to the website for the benefit of our Fellows, Members, donors, and friends.

In the meantime, for more information on the Society’s goals, strategies, and progress, please see the Mission Statement, Vision Statement, and Core Values below as well as the Fiscal Year 2009 Annual Report. For a copy of the original Massachusetts Historical Society Strategic Plan 2008-2013, please contact Director of Development Nicole Leonard at [nleonard@masshist.org](mailto:nleonard@masshist.org).

### Mission Statement

The Massachusetts Historical Society is an independent research library that collects, preserves, makes accessible, and communicates manuscripts and other materials in order to promote the study of the history of Massachusetts and the nation—a mission it has pursued since 1791.

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## **Vision Statement**

The Massachusetts Historical Society is committed to the principle that public knowledge of the nation's past is fundamental to its future. As an independent research library, now in our third century, we remain true to our vision of building a future for our past.

In renewing this commitment for the twenty-first century, we will establish and maintain the highest scholarly and professional standards in all of our activities, and we will pursue national recognition and support for the Society's crucial role in the understanding of American history.

The Society will remain a center for collecting, research, scholarship, and publishing. At its heart, the MHS is a manuscript repository holding extraordinary collections of personal papers, not only of three presidents--John and John Quincy Adams and Thomas Jefferson--but of thousands of individuals and families; these papers document the entire course of American history. We will continue to add to our holdings and acquire new collections. Traditional library activities as well as digital initiatives will underpin the fulfillment of our mission. We will provide the public with an expanded array of programs and materials, offered through a variety of means, to enhance the understanding of our nation's past and its connection to the present day. We will continue to find creative ways to reach the next generation of learners by making positive contributions to the teaching of history.

To realize this vision, the MHS will secure sufficient funding and staffing to support its operations and technology infrastructure and to ensure its long-term financial health. The Society will continue to safeguard its extraordinary collections and improve and protect its historic landmark building. Staff will receive appropriate compensation and opportunities for professional development and will work in an environment that encourages and values collaboration.

We welcome everyone to support our mission, use our resources, take part in our programs, and become a member.

## **Core Values**

The Society is committed to

- fulfilling its mission,
- embodying high intellectual standards in all its endeavors, and maintaining its role as an intellectual leader,
- promoting new scholarship
- encouraging a passion for history,
- offering the content of its unique collections in ways that ensure it is intellectually accessible and broadly and freely available,
- creating programming that engages a broad and intellectually curious audience
- inviting all interested individuals to become members,
- ensuring an institutional culture that reflects respect for staff and its work, and for the Society's history and traditions including its landmark building, and
- ensuring its financial strength.

## **Five-Year Goals and Objectives**

### **Goal 1: Advance the stewardship and availability of the Society's unique collections.**

- Preserve and ensure the security of the collections.
- Continue to make the collections available.
- Continue collecting as governed by the collections policy.
- Expand the impact of the collections to audiences beyond the building.

### **Goal 2: Increase the understanding of the relevance of history among our key audiences.**

- Create broad-based, widely appealing, intellectually strong public programming.
- Encourage and promote new scholarship.
- Use the unique resources and expertise of the MHS to contribute to the improvement of the teaching of American history.
- Plan for limited direct programming for students over the next three to five years.

### **Goal 3: Increase awareness of the Society's unique role and value.**

- Implement a broad marketing effort to make the MHS more widely known and valued.
- Improve the Society's ability to communicate with and develop a national constituency.

### **Goal 4: Build a broad institutional commitment to secure the resources essential to achieve the Society's goals.**

- Leverage the information in the Society's database to inform fundraising efforts.
- Develop and implement a targeted development plan to closely guide the Society's efforts to increase resources.
- Raise the level of engagement of the Board of Trustees, committee members, and staff, and provide them with the ancillary resources and systems to meet targeted development goals.
- Extend the national reach of the Society's fundraising.
- Assess MHS needs and determine if a campaign is necessary. If needed, set a timeframe and begin preparation.
- Create a development office capable of implementing the necessary strategies for sustained growth of revenue and membership.
- Develop and implement a comprehensive plan to improve and expand MHS facilities to achieve the Society's goals.