



2024-2026 Strategic Plan

Approved by the Board of Directors on April 11, 2024
Prepared by Kim Andrews

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I. Executive Summary

On November 3, 1949, the Main Lines Times reported the first meeting of the Lower Merion Historical Society (LMHS). Ninety community residents—about three times more than expected—showed up; most had to stand throughout the meeting.

Over the following 70+ years, the Society has gathered and preserved thousands of books, maps, photographs, and artifacts that tell the stories of our people and communities. Scores of neighbors have donated their possessions, time, and money to this cause. Hundreds of volunteers have provided educational programs to the public. Thousands of students, residents, and scholars have worked with the Society’s extensive resources, in person and online. The Lower Merion Historical Society is a vital force in preserving and sharing the rich heritage of Lower Merion and Narberth.

In 2022, after a challenging several years, the previous Board of Directors coordinated their resignation en masse and appointed an entirely new slate of directors who have been working to reconstitute and rebuild the nearly-dormant organization. Since that time, this new Board of Directors has established a baseline to begin accomplishing the important mission of the organization, rewriting the Bylaws, reopening the collections to researchers, presenting engaging programming, catching up on vital financial practice, and hiring a part-time staff member, all with an understanding that LMHS must augment its traditional history by intentionally gathering and highlighting the stories of women, African American, Jewish, and other underrepresented community groups and individuals.

This 2 1/2 Year Strategic Plan focuses on integrating best practices and inclusion into all aspects of the Lower Merion Historical Society. The purpose of this plan is to establish a strong foundation of prudent governance, basic fundraising, and inclusive programming during the rebuilding process and to prepare for our next, more ambitious strategic plan which will be developed and ready to implement for 2027 and beyond.

II. Mission

The Lower Merion Historical Society is an organization dedicated to “Preserving Our Past for the Future.” This is accomplished by stewardship of local history,

education of the community, preservation of historic resources, and outreach to promote awareness of the cultural heritage of the Township of Lower Merion and the Borough of Narberth.

III. Standards and Ethics Statement

The Lower Merion Historical Society is a member in good standing of the American Association for State and Local History (AASLH), and as such, the Board of the Lower Merion Historical Society (LMHS) commits to making AASLH's industry ethics and practice standards its own.

AASLH is a national membership organization of individuals, agencies, and organizations acting in the public trust, engaged in the practice of history, and representing a variety of disciplines and professions. The Association expects its members to abide by the ethical and performance standards adopted by all appropriate discipline-based and professional organizations. LMHS commits to the ethical statements and related professional standards and best practices provided for the guidance of all members of AASLH.

IV. Goals, Objectives, and Initiatives

Goal 1: Financial - To achieve financial sustainability and growth by implementing strategic budgeting, developing new policies, and optimizing resource allocation, ensuring the long-term financial health of the Lower Merion Historical Society.

Objective 1.1: Establish financial policies to ensure prudent financial management.

Initiative 1.1.1: Draft, approve, and implement a Finance Policy.

Initiative 1.1.2: Draft and implement a Reserve Fund Policy.

Initiative 1.1.3: Draft and implement an Investment Policy.

Initiative 1.1.4: Annually review and update financial policies as needed.

Objective 1.2: Robust budgeting and expense approval process is in place.

Initiative 1.2.1: Annual budgets are approved at year-end for the upcoming year and monitored in monthly finance reports.

Initiative 1.2.2: Streamline the expense approval process with GAAP approved checks and balances.

Goal 2: Facilities/Collections - To enhance and preserve our facilities and collections by implementing best practices in conservation, maintenance, and accessibility, fostering a dynamic, inclusive, and engaging environment for historical exploration and education.

Objective 2.1: Best practices are implemented in staffing and collections management.

Initiative 2.1.1: Optimize collections management practices.

Initiative 2.1.2: Secure and activate intellectual property.

Initiative 2.1.3: Resolve pending loan issues, both incoming and outgoing.

Objective 2.2: Collections preservation and access is ensured.

Initiative 2.2.1: Optimize physical space and storage capacity.

Initiative 2.2.2: Ensure appropriate and effective insurance coverage to protect the society and the collections.

Objective 2.3: Prioritize acquiring, processing, and conducting research with collections from underrepresented Lower Merion and Narberth residents.

Initiative 2.3.1: Acquire and/or explore existing collections that focus on Black LM and Narberth residents.

Initiative 2.3.2: Acquire and/or explore existing collections that focus on Asian American Pacific Islander (AAPI) LM and Narberth residents.

Initiative 2.3.3: Acquire and/or explore existing collections that focus on Jewish LM and Narberth residents.

Initiative 2.3.4: Acquire and/or explore existing collections that focus on women LM and Narberth residents.

Initiative 2.3.5: Continue to seek to acquire and/or identify existing archival materials and collections that illuminate additional underrepresented communities in Lower Merion and Narberth.

Objective 2.4: Cynwyd Station is incorporated into the society's mission.

Initiative 2.4.1: Highlight Cynwyd Station tenant business and LMHS's preservation and oversight.

Initiative 2.4.1: Develop long-term plan for Cynwyd Station.

Goal 3: Program - To develop innovative and inclusive programming that fosters a deeper understanding and appreciation of Lower Merion's and Narberth's history, culture, and heritage, engaging diverse audiences and enriching the community's cultural landscape.

Objective 3.1: Diverse programming is continued and builds institutional relationships.

Initiative 3.1.1: Leverage existing milestones and celebrations to generate programming.

Initiative 3.3.2: Foster relationships and cross-programming with African American churches, synagogues, and other religious communities historically underrepresented in our collections.

Initiative 3.3.3: Prioritize cross-programming with other organizations to minimize LMHS staff resource requirements.

Objective 3.2: Public engagement is increased.

Initiative 3.2.2: Create and implement an annual program calendar to ensure evenly distributed programming throughout the year.

Initiative 3.2.3: Document program planning, engagement and participation.

Initiative 3.2.4: Develop partnerships with local organizations.

Goal 4: Communications/Outreach - To expand our reach and impact through effective communication strategies and community outreach initiatives, amplifying our mission and engaging with stakeholders to cultivate meaningful connections and partnerships.

Objective 4.1: Stakeholders are actively engaged in the society's work.

Initiative 4.1.1: Understand stakeholder segments and how to best communicate with them.

Initiative 4.1.2: Develop direct communications to cultivate potential donors and members.

Initiative 4.1.3: Develop a comprehensive volunteer program.

Initiative 4.1.4: Formalize cross-promotion with partner organizations.

Objective 4.2: Communication strategies are developed and implemented.

Initiative 4.2.1: Leverage existing milestones and celebrations to generate communications messaging.

Initiative 4.2.2: Improve the organization's online presence, ensuring diverse stories are represented on the website and social media.

Initiative 4.2.3: Expand the e-newsletter list with a targeted effort to include a diverse audience.

Initiative 4.2.4: Develop goals and plan for expanding social media reach.

Goal 5: Membership/Advancement - To cultivate a vibrant and supportive membership community and diversify our fundraising efforts, fostering strong donor relationships, and sustainable revenue streams to support our mission and initiatives.

Objective 5.1: Develop and implement a formal membership program with updated financial support levels and clear benefits.

Initiative 5.1.1: Update and implement membership levels.

Initiative 5.1.2: Develop and implement members-only experiences and benefits.

Initiative 5.1.3: Develop and implement membership acquisition and retention plan.

Objective 5.2: Raise funds as needed for operations and for identified collections, preservation, and programmatic needs.

Initiative 5.2.1: Implement low impact donation requests throughout existing communications.

Initiative 5.2.2: Develop annual fundraising calendar.

Initiative 5.2.3: Conduct program, event, and project specific fundraising as needed.

Initiative 5.2.4: Develop a corporate sponsorship program with financial support levels and clear benefits.

Objective 5.3: Develop fundraising partnerships with LM and Narberth heritage organizations.

Initiative 5.3.1: Explore reciprocal board service.

Initiative 5.3.2: Explore strategic realignment, formal programming and/or marketing partnerships, and/or mergers.

Goal 6: Governance - To strengthen governance practices and board effectiveness by promoting transparency, accountability, and diversity, ensuring sound decision-making processes and alignment with our organizational standards and ethics.

Objective 6.1: Board and committee participation is robust and diverse.

Initiative 6.1.1: Add non-board members to committees to cultivate diversity in leadership.

Initiative 6.1.2: Develop and implement a board nomination process.

Initiative 6.1.3: Develop a new board member onboarding process.

Initiative 6.1.3: Develop diversity, equity, and inclusion metrics for programming, governance, and outreach.

Initiative 6.1.4: Implement succession planning.

Objective 6.2: Updated policies support organizational best practices.

Initiative 6.2.1: Evaluate and recommend changes to the committee and board structures.

Initiative 6.2.2: Update existing policies and draft new ones, as needed.

Objective 6.3: Strategic Plan is regularly updated and guides LMHS's work.

Initiative 6.3.1: Implement a regular review of the strategic plan's progress.

Initiative 6.3.2: Completed 2027+ strategic plan ready for implementation.

V. Monitoring and Evaluation

A. Monitoring

Board Meeting Performance Reviews

The board will conduct a review of the strategic implementation plan dashboard at every meeting to assess progress and project milestones. These regular reviews enable us to identify trends, address challenges, and make timely adjustments to our strategies.

B. Evaluation

Annual Strategy Assessment

The board will conduct an annual comprehensive assessment of strategy implementation effectiveness. It will evaluate the alignment of achieved outcomes with planned goals and identify areas for improvement.

Adaptive Planning

The board will adjust the strategic implementation plan based on new conditions, feedback from stakeholders, and the outcomes of the annual strategy assessment. This adaptive approach ensures that our strategies remain relevant and effective.

VI. Conclusion

The Lower Merion Historical Society's 2 1/2 Year Strategic Plan represents a commitment to preserving our rich heritage while embracing inclusivity, innovation, and sustainability. Through this plan, we aim to fortify our financial foundation, enhance our facilities and collections, develop engaging programs, expand our outreach efforts, cultivate a broad and supportive membership community, and strengthen governance practices, preparing for the next strategic plan, which will be developed and ready for implementation for 2027 and beyond.

By integrating best practices and inclusion into all aspects of our operations, we will ensure that the LMHS continues to serve as a vital force in preserving and sharing the history of Lower Merion and Narberth, fostering a dynamic and resilient organization for generations to come.

V. Appendix

2023-24 Board of Directors

Officers

Kate Jiggins - President	Craig Whitney - Treasurer
Erin Betley - Vice President	Linda Tasker - Secretary
Ted Goldsborough - President Emeritus	

Members

Kim Andrews	Dennis Montagna
Chad Henneberry	Scott Reynolds
Elizabeth Laurent	Jamie Singer
	Brad Upp

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