



MEDFORD HISTORICAL SOCIETY & MUSEUM

10 Governors Avenue, Medford, MA 02155



Postcard of 10 Governors Avenue ca. 1930

Strategic Plan 2014 – 2016

Community-building through a shared sense of Medford's history.

Mission: To collect, preserve, and promote Medford's history, offering educational lectures and programs to the general public.

Approved by the Board of Directors, December 9, 2013

The Medford Historical Society, a 501-c3 non-profit, was founded in 1896 to “to collect, preserve, and promote Medford’s history.” The Society is a volunteer organization governed by a Board of Directors elected annually by the membership, currently numbering close to 200. Its headquarters at 10 Governors Avenue was constructed in 1916, and houses both research and museum collections. To recognize its large holding of historical artifacts and objects, and its exhibits of Medford history, we recently added “Museum” to its name. As of December 2013, we are called the Medford Historical Society & Museum (MHSM).

MHSM has seen years of prosperity and extraordinary accomplishments, as well as lean times. Although there have been ebbs and flows in its membership numbers, finances, program attendance, progress in cataloguing and making accessible its collections, our debt of gratitude to those who brought us to this place is inestimable. Today we are blessed with a skilled and hard-working cadre of volunteers and have a great deal for which to be proud. The needs of our collections and buildings, however, exceed available person-power and funds.

Recognizing the critical need for increased funding and an expanded pool of workers to appropriately care for our valuable collections and share them with the public, the Board of Directors embarked on a Strategic Planning process early in 2013. The Board commissioned a committee of five members to survey the membership and identify the strengths and weaknesses of the organization. The committee met regularly to collect and evaluate data, write, rewrite, prioritize and move toward action. This report represents the product of that six-month project.

The Strategic Plan was approved unanimously by the Board of Directors at the December, 2013 meeting. Several taskforce groups are now underway, having drafted three-year Goals and Action Items for Year 1. The Strategic Planning committee intends to continue to meet, to encourage and coordinate these taskforces, helping to ensure that recommended actions are implemented.

“Strengths” to celebrate include:

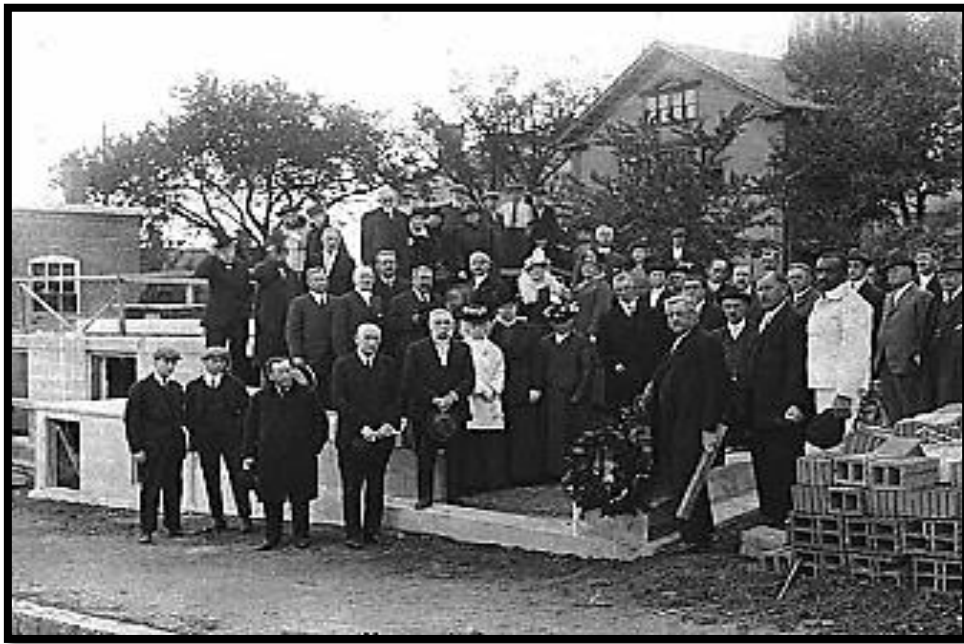
- publishing a well-received quarterly newsletter offering new insights into Medford history
- making significant progress on cataloguing our general and Civil War collections
- producing a major “Faces of the Civil War” exhibit and numerous smaller exhibits
- renovating the main exhibit hall
- engaging a part-time office manager/cataloguer made possible by several successful fundraisers and annual appeals
- strengthening of the society’s physical, procedural, and fiscal position, as well as spirit, following a leadership transition a decade ago

MHSM owns two historic buildings, both of which have deferred-maintenance needs. We have rooms full of fascinating but vulnerable artifacts and papers, many which remain uncatalogued, some in precarious states of preservation. Much more could be done to reach out to the larger community, school children, online history sites, and potential new members and volunteers.

In this Strategic Plan, we will:

- outline the current status (***Description and Strengths***),
- identify ***Challenges***,
- set ***Goals***, and
- propose ***Action Plans*** to accomplish those goals, for the following areas within our organization:

1. Buildings:	page 4
a. MHSM Headquarters at 10 Governors Avenue	page 4
b. Peter Tufts House, 350 Riverside Avenue	page 5
2. Collections	page 7
3. MHSM Presence in the Community:	page 10
a. Programs	page 10
b. Communications and Outreach	page 11
c. Education Outreach	page 12
4. Organizational Structure	page 13
5. Finances	page 16
6. Conclusion	page 17



Laying the cornerstone for the Medford Historical Society building at 10 Governors Avenue in 1916

1. Buildings

a. The 10 Governors Avenue Facility

Description and Strengths

MHSM owns the headquarters building at 10 Governors Avenue, Medford, MA 02155. The building, dating from 1916, is in good structural condition and provides space for storage (750 sq. ft.) in the basement, curatorial workspace (600 sq. ft.) on the upper floor, and a large area on the main floor (750 sq. ft) for medium sized meetings and museum displays. There is also an entrance vestibule large enough for additional displays, a restroom, and a utility room suitable for staging light refreshments at events. While not perfect, the size and layout of the building reasonably match our current needs: it is a serviceable facility for housing Museum collections, affords space to hold small classes for children and open houses for the community, and workspace for the volunteers as well as visitors during open hours. On occasion, the space is also lent out to other local organization for meeting space, for a donation to MHSM. In 2011, the lighting and ceiling in the main hall were replaced and new fixtures were installed in the entrance hall and curatorial room along with additional electrical outlets.

Challenges

The main hall is now in satisfactory condition, but many other interior surfaces remain in need of refinishing. The building received a heating system upgrade in November 2013. An additional upgrade to the air conditioning would also be appropriate for museum space whose collection contains many valuable, fragile artifacts.

GOAL:

Maintain and improve the Governors Avenue facility in a fiscally responsible way, for use in supporting MHSM's general mission of service of the community.

ACTION PLAN:

- a. Recruit a "House Committee" to oversee upgrades and maintenance;
- b. Create a prioritized list of projects for volunteers, and another list of small maintenance and improvements requiring professional services;
- c. Seek funding through grants and donations to upgrade the air conditioning to a more efficient system appropriate to a museum; and
- d. Insure that the MHSM budget continues to include sufficient funds for utility services and small repair maintenance projects.

Point Person: John Anderson (President); "House Committee" Chairperson.



The Peter Tufts House date ca. 1678 in a photo from about 1894

b. The Peter Tufts House**Description and Strengths**

The Peter Tufts House at 350 Riverside Avenue (old Ship Street), is an historic brick building listed on the National Register of Historic Places. Sources suggest it is the oldest brick house in America, built ca.1678. In addition, it is associated with the Tufts and Lawrence families who have been involved in Medford history for centuries.

Challenges

The House is currently in transition; a long time tenant/caretaker moved out in August 2013, and it is time to reconsider the best use for the house. The house is structurally sound, but mechanical systems including plumbing, wiring, and heating are all out dated. The kitchen and bath are mid-twentieth century and need repair or replacement, depending on the future use of the building. The MHSM Board has agreed that they lack the skills, time, and money to properly upgrade, maintain, and manage the property, so research has begun to determine “best use” of the house and what will be needed to re-purpose the building in terms of expertise and funds. If MHSM cannot provide the resources to provide appropriate stewardship, then we would seek a new owner to assume that responsibility. Assessment of necessary preservation work must also be completed if the house is to be maintained by MHSM.

1. **Finances:** Necessary repairs will likely cost \$100,000 to \$200,000. Therefore, a volunteer committee is needed to organize major fundraising.
2. **Project Management.** A volunteer or paid project manager is needed.
3. **Property Management.** If MHSM retains the property, a manager (professional or volunteer) will be needed.

GOAL:

Re-purpose the Peter Tufts House to better serve the community while being financially sustainable. Options are being researched as of December 2013. Ultimate goals are:

- to appropriately preserve this house in perpetuity for the benefit of Medford and the larger historic-conservation community, AND
- to provide an income-stream to sustain MHSM’s stewardship.

While there is no plan at present to develop a museum or study property, we are keeping that option open.

ACTION PLAN:

MHSM has recruited a committee of volunteers to make recommendations to the Board and manage the transition of the property to its new use. Beth Hayes, a local Realtor and regular MHSM Volunteer, is chairing the committee and supervising the collection of estimates, thus assembling the larger picture of the building’s essential needs. We also believe an historic structural assessment needs to be done before any substantial work begins.

Point People: Beth Hayes (Volunteer); John Anderson (President)

Peter Tufts House exhibit case in the main hall.



2. Collections

Description and Strengths:

MHSM possesses a unique collection of manuscripts, books, artifacts, and furniture specific to Medford between the 17th to 20th centuries. It also holds a nationally significant collection of Civil War photographs and other Civil War artifacts and memorabilia.

a. Research Collection Highlights

- City records
- Documents, scrapbooks, letters and other manuscript items
- Genealogical records and resources
- House history records and resources
- Various maps of Medford, from the 17th century to the present
- Medford history books and articles
- Photographs of Medford citizens, places and events
- Postcards
- Documents and records of Medford clubs, organizations and businesses
- Full series and multiple copies of the MHS *Historical Register* a quarterly bulletin published between 1898-1943
- Archives of MHSM and its activities

b. Museum Collection Highlights

- An extensive Civil War collection, including portraits and other photos, as well as other military artifacts
- Various historical paintings and portraits
- Furniture
- Medford Rum artifacts
- Native American artifacts and tools
- Textiles
- Historical books and documents
- Objects from daily life
- Objects owned by or related to significant historical persons (e.g. John Brown's hair, Lydia Maria Child's cradle)



Challenges:

1. Additional volunteers and, ideally, paid professional staff, are needed to accomplish a long list of recommended cataloging, conservation, and exhibit/display tasks. Funds are needed for same.
2. Hours the collections are available to the public are restricted to Sundays, noon-4 pm. More volunteers or staff are needed to expand coverage.

GOALS:

Strengthen collection management; expand exhibits and related programs showcasing the history of Medford, by focusing on the following areas:

- a. **Inventory:** Move the process forward by identifying and planning targeted collection projects, to understand what we have, and determine conservation needs.
- b. **Cataloging:** Use PastPerfect Museum Software to document the entire collection and eventually provide online access to the catalog.
- c. **Preservation:** Identify items and collections that are in need of preservation treatment and pursue funding for the treatment.
- d. **Staff:** Pursue annual **internships**, grant funded **professionals**, and **volunteers** to carry out targeted collection projects.
- e. **Exhibits.** Create exhibits on a regular basis to promote the history of Medford and highlight the Society's collections, both within and outside the MHSM facility.
- f. **Civil War Photograph Collection:** Continue efforts to find funding for **digitization**.
- g. **Collection Development:** Create and implement a Collection Policy with procedures and forms for donations, accessions, de-accessions, loans, image requests, and other collection issues.
- h. **Funding:** Work with Fundraising Taskforce to find opportunities for outside support.

ACTION PLAN:**a. Cataloging and Access to collections:**

- i. Complete a collection manual including policies, procedures, and forms.
- ii. Work towards getting the PastPerfect catalog online.
- iii. Create a disaster plan using the D-Plan service from the NEDCC.
- iv. Complete transcription of the Lydia Maria Child manuscript and seek advice from a rare book expert on the best future for the item.
- v. Investigate the implications and requirements for participation in the Digital Commonwealth program.
- vi. Make research sources available online through the Society website.

b. Projects for volunteers and interns, to include:

- i. Complete an inventory of the entire collection and holdings.
- ii. Contact the Bureau of Indian Affairs and have the Native American skeletons properly interred.
- c. **Target large-scale projects for summer interns and encourage application for the internships which would commence in summer 2014.** Continue this practice annually.
- d. **Preservation:** Create a preservation procedure manual for staff and volunteers.

e. **Exhibits:**

- i. Create an exhibit plan and schedule for updating cases on a regular basis.
- ii. Discuss creating exhibits through collaboration with other organizations, for example, Wayland High School's event based on Lydia Maria Child's *Frugal Housewife*.
- iii. Create online exhibits through the new website.

f. Some proposed exhibits include: Chevalier objects, Peter Escott's "Children in the Civil War" collection, World War I memorabilia and the art of George Loring Brown.

Continue our connection with the Tufts Museum Studies program and invite student interns to design exhibits; invite MHSM members to work with students.

g. **Civil War Photographs:** Continue investigating the digitization, funding and partnership opportunities for the preservation of this collection.

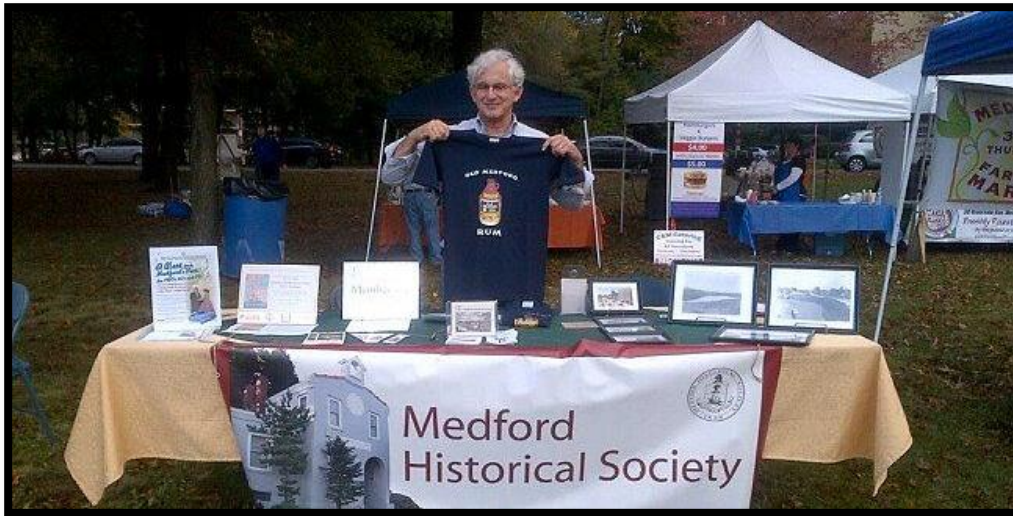
h. **Funding:**

1. Apply for a Preservation Survey Grant; create an action plan based on the survey recommendations.
2. In conjunction with the Fundraising Taskforce, investigate other grant and funding options, such as the Massachusetts Foundation for the Humanities, for targeted projects.



Point People: Barbara Kerr, Director of Collections. Collections Leadership (Barbara Kerr, Allison Andrews, Kyna Hamill) to work out specifics to achieve goals, with the help of a newly expanded volunteer crew.

Of the People: Faces of the Civil War exhibit opening, 2009



John Anderson, President, at the Mystic River Celebration, 2011

3. MHSM Presence in the Community

The Program Committee plans and implements the following:

- Public programs within MHSM and in collaboration with other local groups;
- Information tables at community events;
- Fundraising events;
- Education Programs for Youth.

1. Programs

Description and Strengths

MHSM offers a wide variety of regularly scheduled free programs of historic and social interest for adults and all-age audiences, as well as educational activities for school children. These programs attract significant interest and participation.

Challenges:

The primary need is increased volunteer support, both in the planning and in the implementation of programs. We need to improve ways of delegating production of events (e.g. publicity) and utilizing and retaining new volunteers.

GOAL:

Promote Medford's history through innovative and inviting programming.



Kyna Hamill and Mike Ryan giving a lecture on the Middlesex Fells, 2013

ACTION PLAN:

- Recruit a new Program Committee chair and new members;
- Determine how to distribute the responsibilities for the events to equalize workload;
- Outline a 2-year plan of public programs, seeking new program ideas to provide more visibility to MHSM. Consider, for example: a film series at Chevalier Hall, well-known authors and lecturers, links with Civil War Sesquicentennial, 100th anniversary (2014) of the start of the Great War (WWI), 100th anniversary (2016) of the MHSM building;
- Work closely with the Publicity/Outreach/Communication specialist to design an on-going publicity plan for MHSM programs;
- Continue to cultivate good working relationships and joint programming with partner community organizations such as the Library, Arts Council, CACHE, and other local historical groups;
- Staff tables at community events, with help from high school recruits, other MHSM volunteers, and perhaps Tufts students. (Opportunity to recruit volunteers/interns from Tufts; work with Volunteer Coordinator.)

Point Person: Kyna Hamill

2. Communication and Outreach.

Description and Strengths

MHSM publishes a quarterly newsletter of professional quality, of interest to members and non-members alike, featuring articles related to Medford's history and topics of current interest. In 2013 we also began sending a monthly information e-mail to members and created a Facebook page. Regular updates inform the public who are not necessarily members about activities and historic facts about Medford. Our website which has served us well for many years is currently undergoing a major upgrade. Visit us at www.medfordhistorical.org.

GOAL:

Expand MHSM publicity and communications in order to increase awareness of MHSM within the community, to promote Medford History, and to increase membership and volunteerism within the Society. Communicate enthusiastically why *it's fun and rewarding* to volunteer here – an opportunity to work with historically significant artifacts, collaborate with others who share your interest, make a difference in your community by preserving unique objects and stories, alongside remarkably nice folks!

ACTION PLAN:

- Continue to utilize the current outreach efforts while seeking to expand and improve our publicity efforts through new communication opportunities, both on line and hard-copy;
- Create a **publicity plan** including web, social media, email, print, flyers, and press releases;
- Undertake a major update and expansion of the **website**, to highlight the organization and events, providing links to basic Medford history sources, provide video content, etc.



- d. Establish an on-line presence for MHSM through the use of **social media** as part of the Society's on-going outreach efforts;
- e. **On-line Resources.** Give more consideration to the development of on-line reference materials/resources, both of our own collections (e.g. digitized photos, online catalog) and links to other historical resources.
- f. Seek funding to develop a City of Medford Historical **video** and a MHSM video.
- g. Formulate procedures, policies and workflow to address research, photo, and other **inquiries** handled by the Society to assure queries are answered in a timely manner.
- h. Strengthen and expand **Partnerships** with related community organizations such as the Medford Public Library, The Royall House and Slave Quarters, M-BELT (Medford-Brooks Estate Land Trust), the Medford Arts Council, CACHE (Medford Coalition for Arts, Culture, and a Healthy Economy), the Mystic Art Gallery, the Friends of the Middlesex Fells, and the Medford Bicycle Advisory Commission.
- i. **Newsletters.** The current structure yields an excellent product, but procedures should be made systematic and transparent for new volunteers to become involved.
- j. Improve **brochures** and other informational flyers.
- k. Distribute Newsletters and other publications at public events.
- l. Promote MHSM through signage, for example an informational kiosk, or a colorful outdoor hanging **banner** for the Governors Avenue building.

Point Person:

Various, including Kyna Hamill and Allison Andrews.

3. Education Outreach

Description and Strengths

For several years, MHSM has hosted third-graders from the Medford Public Schools, offering an entertaining and informative introduction to some historic artifacts, as part of their "Local History" curriculum. A retired teacher who volunteers at MHSM has presented the programs, arranged by our Staff member and assisted by volunteers. Grants from the "Pyramid" foundation have supported this program. Additional grant support is being sought to create training modules for teachers. For the past three years, we have judged Civil War essays written by 8th graders at St. Joseph's school, a program in memory of our late president John Lonergan. And we have been peripherally but enthusiastically involved in several other community youth projects, such as the "Over the River" mural at the Andrews School.



Peter Escott with School kids

Challenges

We offer these programs at no charge, but incur costs to do so. It would be wonderful to do more such programs, had we additional volunteers and funds.

GOAL:

To solidify the current program, and expand it to other youth groups, recognizing that this is at the core of our mission.

Action Plan:

- a. Train additional volunteers to lead presentations for students. (A training video was made in 2012.)
- b. Continue to develop thematic programs.
- c. Continue the project currently underway to develop an online teacher reference tool and activity book for students. Give consideration to leading a professional development program.
- d. Network with teachers and administration.
- e. Pursue grants (e.g. Cultural Council)

Point Person: Allison Andrews

4. Organizational Structure

Description and Strengths:

The organization is run by its members, a dedicated group of volunteers, and our one quarter-time Office Manager/Cataloguer. Members elect officers to the Board of Directors annually at an open Annual Meeting. MHSM committee chairs are appointed from the membership by the Board. Committee membership is open to all interested members.

Challenges:

A broader base of members, volunteers, and leadership is crucial to maintain current initiatives, attend to deferred maintenance of buildings and collections, and expand our vision and scope for the future. Training and succession planning for leadership on the Board, and ongoing strategy for recruitment of new members, are necessary to maximize satisfaction, clarity, and effectiveness of volunteers/leaders, and avoid confusion, wasted effort, and burn-out.

a. MHSM Membership

GOAL:

Expand efforts to become an exemplary organization that people will want to join because it is a welcoming, interesting, fun, and effective organization. Develop initiatives that would engage new members including participating in exhibits, writing for the newsletter, planning programs and creating content for the website.

ACTION PLAN:

Recruit a Membership Outreach Coordinator, who will work with the Membership Manager to organize a committee to accomplish the following:

- a. Develop a membership recruitment plan, drawing on the contacts and energies of MHSM members and friends, and also seeking advice from partner organizations and online small-museum websites about techniques for expanding the membership base;

- b. Utilize the drop-in, web inquiries, newsletter and all events to recommend membership;
- c. Produce an inviting membership brochure;
- d. Design special new-member open houses or other events;
- e. Ensure that the routine processes which comprise the Membership Manager's job description (deposits, recording of memberships, acknowledgement letters, preparation of mailing labels, membership reports for board, etc) are attended to promptly.

Point Person: Membership Manager (Mike Oliver); Membership Outreach Coordinator TBD



Volunteers: Cambia Davis, Kaliegh Smith and Peter Escott
dismantling the Civil War cases, summer 2013

b. Volunteer and Board Development.

GOAL:

Assure continuity of the organization by identifying and supporting member participation; recruiting, training, and supporting new volunteers.

ACTION PLAN:

- a. Designate a Volunteer Coordinator responsible for encouraging members and local students to volunteer for projects and events, taking advantage of special interests, knowledge and talents. Coordinator and/or committee members will:
 - i. Work with other committee chairs to identify volunteer needs; write up "job descriptions".
 - ii. Coordinate with the Membership Manager to glean names from the membership renewal and new member drives to identify new volunteers;
 - iii. Create an intake form and database recording the potential volunteer's areas of interest and skills;
 - iv. Match the volunteer with an appropriate supervisor, and ensure that training is adequate;

- v. Offer training/guidelines for interns/volunteers and intern/volunteer supervisors; there may be specific requirements for interns (vs volunteers);
 - vi. Track the work accomplished;
 - vii. Acknowledge volunteer contributions with gatherings and in writing, including writing job or school recommendations if asked;
 - viii. Hold periodic meetings for volunteers.
- b. Present a course for members and others introducing the MHSM collections and offerings to encourage membership, expand volunteer base, and provide training;
 - c. Make use of the school community service requirement to recruit young volunteers plus any other groups like Girl/Boy Scouts; Tufts and other schools for interns;
 - d. Develop a training and succession process for key Board positions: President, Vice President, Treasurer, Program Chair, and other key committee chairs.

Point Person:

1. Volunteer Coordinator: Barbara Kerr, as of December 2013.
2. Office Manager, Allison Andrews, has been preparing job descriptions for all roles at MHSM, working with President John Anderson and Vice-President Kyna Hamill.

c. Administration and Staffing.

GOAL:

Utilize volunteers and paid staff effectively and appropriately in the work of the MHSM.

ACTION PLAN:

- d. Work toward a full-time, paid staff position to serve as Administrator of the MHSM, as funding for programs and projects allow;
- e. Create a job description for all paid and responsible volunteer positions;
- f. Develop policies and procedures for Board approval on as many administrative matters as can be identified;
- g. Seek and utilize interns from local educational institutions to work on targeted projects as well as their own interest areas;
- h. Pay close attention to the assignment of responsibilities and recordkeeping of hours worked by paid staff to assure compliance with wage and hour laws;
- i. Maintain a prioritized list of “targeted projects” that are manageable and doable by the staff and volunteers assigned.

Point Person:

1. Personnel Consultant: Susan Fedo
2. Job descriptions and project lists: Allison Andrews, Kyna Hamill, Barbara Kerr



Allison Andrews, Office Manager

5. Finances

Description/Strengths:

The Financial operation consists of two main areas:

- **Financial Management:** Budgeting, monitoring and paying expenses; processing income; investing savings; filing tax and other fiduciary forms; ensuring accuracy and integrity of accounting records and procedures.
- **Fundraising:** Finding the money to allow MHSM to operate, in the form of grants, special events, major donations, new income streams.

MHSM is debt-free, and has thus far managed to meet its most basic financial obligations (utilities, insurance, office, program, publications). Our income of about \$15,000 roughly balances out against our current program level.

Challenges:

1. At present, only one volunteer Treasurer handles all aspects of Financial Management, while a vice-Treasurer handles the memberships. A larger team must be developed to share the work, check for errors, and provide internal audit capabilities.
2. Our current budget covers only a fraction of what we ought to be spending to properly care for our buildings and collections, catalogue and digitize as appropriate, and pay for staff.

GOALS:

1. Continue to fulfill the various aspects of financial management to ensure the continuation of MHSM.
2. Attract sufficient talent to the finance committee to accomplish these goals (i.e. recruit new members with fresh expertise) working as two teams:
 - a. **Financial Management:** Working with the Treasurer, take responsibility for the Society's financial management and other financial activities such as:
 - Investigate opportunities to secure an income stream (e.g. rentals, photo rights) ;
 - Explore investment and endowment-building strategies;
 - Establish financial/bookkeeping/accounting policies and procedures
 - Prepare and monitor annual budget;
 - Oversight of wage & hour regulations for any paid staff or consultant;
 - Maintenance of the books, filing of tax returns, and preparation of financial statements according to sound accounting principles.
 - b. **Fundraising:** Establish and implement annual fund-raising goals and plans, including a long-range plan for building an endowment

ACTION PLAN:

Gather a committee to work towards the above goals.

Point Person: Ruth Roper, Treasurer

Conclusion:

While our Strategic Plan committee started with the idea of a three-year plan, as we developed goals and objectives, we concluded that action steps/recommendations for Year One would be more helpful at this point. Detailed action plans will be drawn up by the taskforce committees who will use the Plan to establish priorities and work out timetables. Committee chairs will report to the full Board at our regular monthly meetings and we will assess progress during July and August 2014. We view the Strategic Plan as a starting point, a document that provides direction, one that will be refined and enhanced as MSHM moves ahead.



Members who received historic house markers, 2006