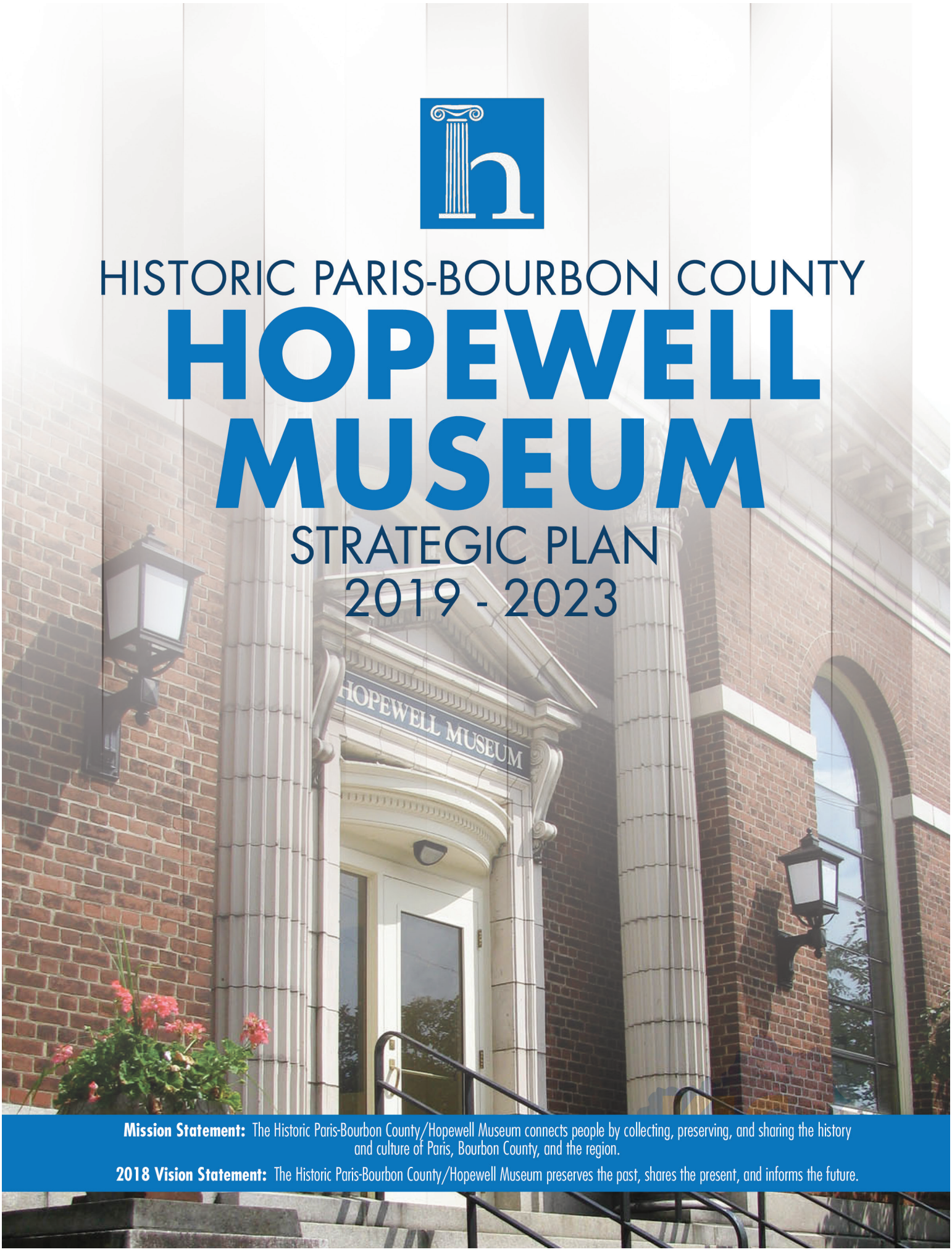
HISTORIC PARIS-BOURBON COUNTY
HOPEWELL MUSEUM
STRATEGIC PLAN
2019 - 2023



Mission Statement: The Historic Paris-Bourbon County/Hopewell Museum connects people by collecting, preserving, and sharing the history and culture of Paris, Bourbon County, and the region.

2018 Vision Statement: The Historic Paris-Bourbon County/Hopewell Museum preserves the past, shares the present, and informs the future.

Historic Paris-Bourbon County/ Hopewell Museum

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HISTORIC PARIS-BOURBON COUNTY

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Introduction

In 2018, the Board of Directors of the Historic Paris-Bourbon County/Hopewell Museum undertook a three-pronged approach to address the future of the organization. First, members of the board worked on an organizational analysis which was in part paid for with a grant from the Kentucky Local History Trust Fund. With the grant, the museum enrolled in the Standards and Excellence Programs for History Organizations (StEPS), a self-evaluation process developed by the American Association for State and Local History (AASLH).

This initial analysis led to the second effort, a voluntary peer-review initiative, known as the Museum Assessment Program (MAP). This service is supported by a cooperative agreement among the Institute of Museum and Library Services (IMLS) and the American Alliance of Museums (AAM). An Organizational Assessment Review was conducted by Deborah A. Smith, a consultant for the American Alliance of Museums.

During this organizational review, the museum board indicated a desire to address three specific areas: improving risk management, stabilizing finances, and refining the mission statement.

To honor the previous work of the board of directors, the 2013 Strategic Plan and 2016 evaluation of that plan, also guided this strategic planning process.

The third step taken by the museum board of directors was to develop the framework of this strategic plan. The board and staff worked closely with the Kentucky League of Cities Community Development Services (KLC CDS) to organize and complete the plan. As facilitators, KLC CDS assisted the board with further discussions, inviting input from members, volunteers and the community at large. Further, the input provided from stakeholders and residents led to extensive feedback which was used to inform the establishment of goals and strategies which have been incorporated in this final strategic plan.

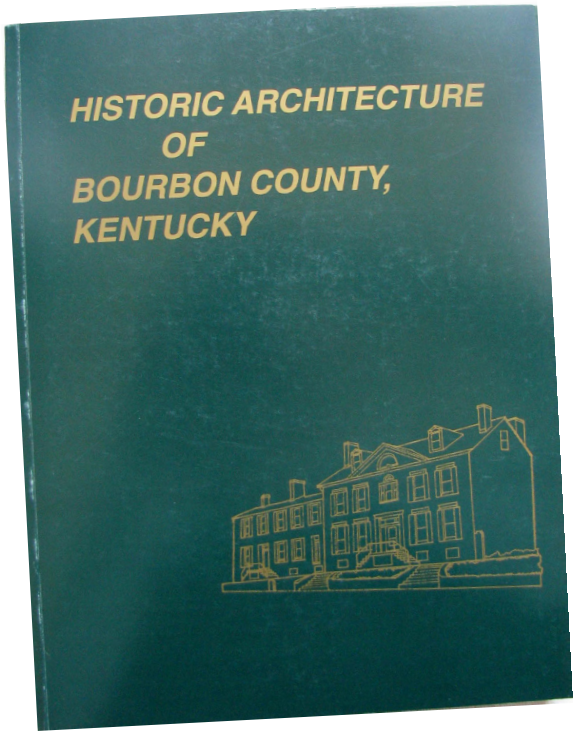
The desired outcomes of the planning process included the following:

- ✓ Refresh the mission and vision statements;
- ✓ Analyze the budget alongside the mission and priorities (spending versus values, track donations);
- ✓ Discuss current operations (facility, technology, collections) and assess personnel needs (customer service);
- ✓ Identify potential opportunities and priorities (staff diversity; public relations within community regarding preservation; becoming a resource and a better community partner);
- ✓ Consider what may be on the horizon over the next few years (expand tourism draw, connect to horse museum or other tourism offerings; serve as resource for preservation of historic structures within the community); and
- ✓ Determine next steps to grow the organization from being viable to sustainable (see previous statements).

As recommended in the 2018 MAP, this plan includes the same benchmarking matrix and timeline used in the 2016 evaluation of the 2013 plan.

Museum Background

Historic Paris-Bourbon County (HPBC) is a membership organization, established when Articles of Incorporation were filed on May 19, 1978. The organization is dedicated to education and advocacy for historic preservation in the region. The HPBC initially met in members' homes. During the formative years of HPBC, members worked on the publication of *Historic Architecture of Bourbon County, Kentucky*, published in 1985 and a seminal record of early Bourbon County architecture. HPBC also promoted historic preservation education and advocacy through house tours, lectures, historical events and workshops.



Later, the HPBC took on the responsibility of managing their own facility, a historic property in downtown Paris, the former Post Office. This building was a gift from the City of Paris and the impetus for opening the Hopewell Museum.

Founded in 1994 as a committee of Historic Paris-Bourbon County, Inc., the Hopewell Museum is housed in a Beaux Arts-style building which was added to the National Register of Historic Places in 1989. A grant from Save America's Treasures helped fund a $750,000 renovation project in 2003-2004.

In 2007, the boards of HPBC and Hopewell Museum combined their operations to better serve the geographic region of Bourbon County and its neighboring Kentucky counties along with traveling visitors. Today, the Historic Paris-Bourbon County/ Hopewell Museum is the primary organization for historic preservation, education and advocacy within the community.[1]

[1] This summary is an edited version taken from the 2018 MAP, with information provided from the online profile posted by the Blue Grass Community Foundation at www.GoodGiving.net site.

Executive Summary

The 2019 Strategic Plan for the Historic Paris-Bourbon County/Hopewell Museum is the result of a collaborative effort between the HPBC/Hopewell Museum board of directors and the Kentucky League of Cities (KLC). The five-year update builds upon the 2013 strategic plan and a Museum Assessment Program planning effort to examine the organization's condition and structure ways that it can position itself to best meet the needs of the Paris-Bourbon County region.

The process used by KLC was divided into four phases: preparation, information gathering, content development and layout and design.

1. In the preparation stage, KLC met with the board of directors and the executive director, conducted their own assessment of current conditions, and analyzed previous planning and implementation activities.

2. During the information gathering phase, KLC conducted a community listening session and an online survey to solicit public input. KLC also facilitated a board of director's retreat to work on mission and vision statements and evaluate the organization's goals, values, and structure.

3. Responses from the information gathering phase were incorporated into the initial framework of the strategic plan.

4. Working alongside the executive director and the board of directors, the final strategic plan was developed.

During the construction of the strategic plan, it became evident that the museum is in a position of relative strength. Overall, the organization's events, exhibits, and other programming are well received and attended by the public and it benefits from a committed and passionate group of volunteers and staff.

However, HPBC/Hopewell Museum primary concerns are how it will continue to build its relevance as an important community resource for years to come. A common concern heard during the planning process was how HPBC/Hopewell Museum can encourage the participation of a more diverse and youthful group of volunteers and visitors. Moreover, it is critical for HPBC/Hopewell Museum to continually evaluate its operations (including its exhibits and events) and identify ways in which it can best reaffirm its importance through new marketing initiatives, community partnerships, and an enterprising board of directors.

Values, Mission and Vision Statements

The details of this strategic plan offer a roadmap for the organization to capitalize on its successes, reestablish its priorities, and maintain its position as a preeminent community organization that captures the best that Paris and Bourbon County has to offer.

HPBC/Hopewell Museum Values

- Dedicated to the mission
- The museum building
- Professional staff and leadership
- Active engagement and collaboration of partnerships that benefit the community
- Advocate for the preservation of buildings, sites, and documents
- Active engagement that benefits the community

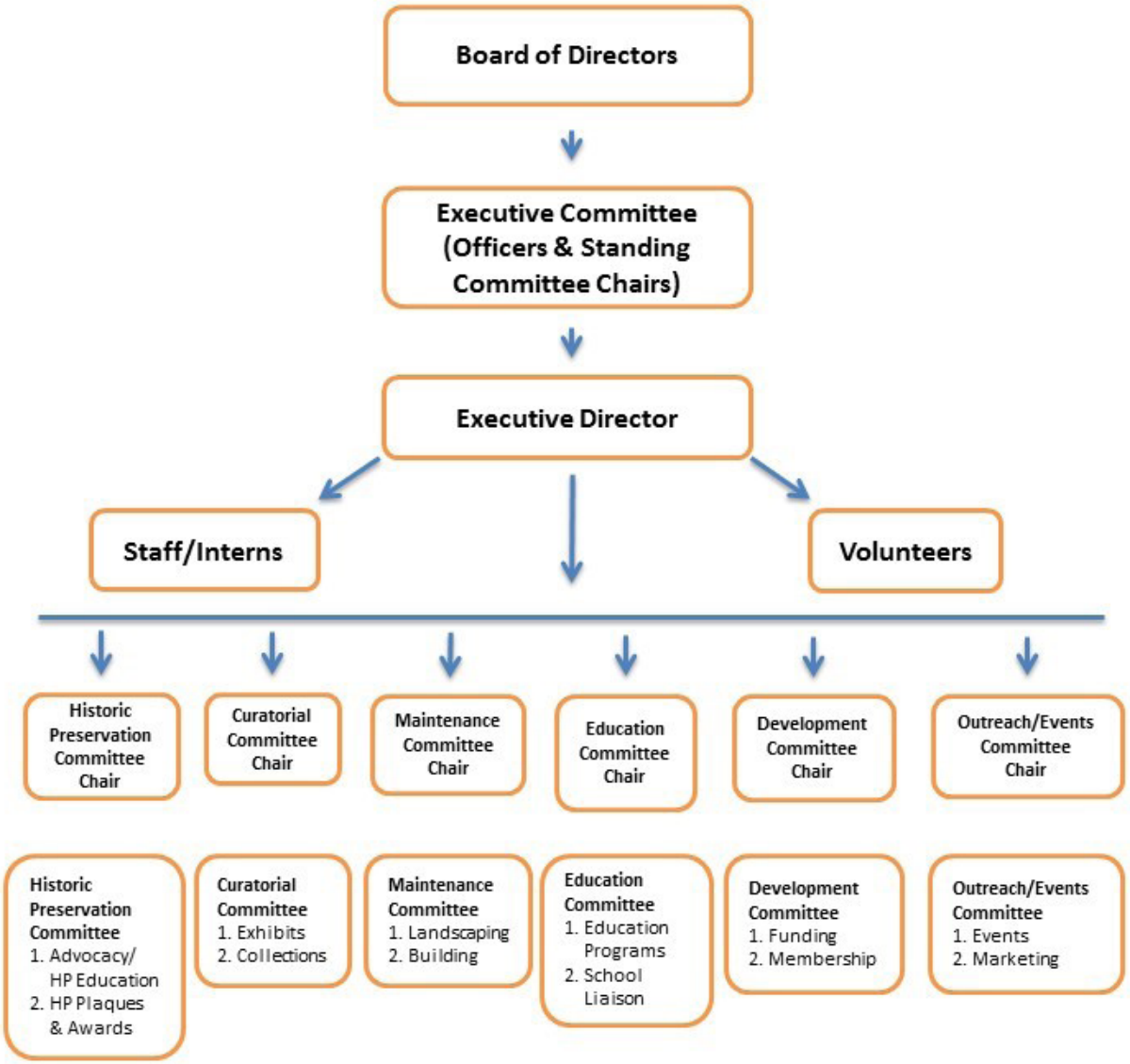
2019 Mission Statement

The Historic Paris-Bourbon County/Hopewell Museum connects people by collecting, preserving, and sharing the history and culture of Paris, Bourbon County, and the region.

2019 Vision Statement

The Historic Paris-Bourbon County/Hopewell Museum preserves the past, shares the present, and informs the future.

HPBC/Hopewell Museum Organization Chart 2018



Good Governance – the Weil Matrix

In the February 2018 Organizational Assessment Summary Final Report, Deborah A. Smith, Ph.D. provided the following information regarding good governance. A portion of her recommendation is shared here.

Governance means making choices, an exercise requiring recognition that every choice involves trade-offs and risks, as well as recognizing the motivations for the choice. Good governance also means the composition of the governing authority meets the needs of the museum in fulfilling its mission and implementing its strategic plan. Equitable representation of the community (age, gender, race/ethnicity, income, education, networks, and skills) is only part of the picture. Achieving a good composition also requires self-awareness.

Measuring success matters, first because museums must not waste public resources, and second because success will generate greater support. However, museum scholar Stephen Weil believed that, "To try to measure a museum's outcomes in the same way as those, for example, of a health or human service agency is to get truly deep into apples and oranges…the impact may be subtle, diffuse, intermixed with the impact of other organizations, and not always immediate."

In one of his last published articles (2005), he devised a matrix of evaluation metrics that still offers good guidance more than a decade later:

Purpose (Mission)	Resources (Staff, space, money, good will)
Effectiveness (Achievement of purpose)	Efficiency (How museum goes about it)

The upper horizontal dimensions are the primary concerns for the governing authority; the horizontal lower dimensions are staff responsibilities. The left side vertical dimensions are the ends (qualitative outcomes); the right side is the means (quantitative outputs). Weil embellished this matrix by placing programs (broadly defined as all operational areas) squarely at the intersection of all four dimensions. Programs are either directly aimed at the public to achieve its purpose, or supportive. Thus, since all museum operations must consider each dimension, the full matrix is needed to appraise their success.

Source: A Success/Failure Matrix for Museums. Stephen E. Weil (2005). *Museum News* 84 (1): 36-40

Organizational Goals

In 2013, the HPBC/Hopewell Museum established over-arching goals for the organization. On May 29, 2018, the board updated the organization goals at a board retreat. In addition to the previous five goals, two additional goals were added as number six and seven shown in the chart below.

Also included in the chart are the responsible committees (including the board of directors) for each organizational goal. While the responsible committees are not exclusively responsible for their assigned goal(s), this relationship has been determined by the current set of objectives that each have developed during the planning process, and therefore is subject to change as progress is made.

Organizational Goals

	2019 ORGANIZATIONAL GOAL	RESPONSIBLE COMMITTEE(S)	BENCHMARKS
1	Create, enhance and diversify programs/ activities so as to build the membership and the recognition of HPBC/Hopewell Museum.	• Board of Directors • Curatorial • Education • Community Outreach	Maintain member and attendance levels. By year three, increase both by 5%.
2	Continue to be a strong advocate for historic preservation in the county and the region.	• Board of Directors • Historic Preservation	Track and record preservation and education efforts.
3	Maintain the functional capability of current and future facilities as an example of historic preservation for the community and the region.	• Board of Directors • Maintenance	Complete Disaster/ Emergency Plan. Address Hopewell building needs.
4	Strengthen the operational and financial capacity of the organization to be sustainable over time.	• Board of Directors • Development	Increase endowment to $200,000.
5	Strengthen the board structure, diversity and processes to more efficiently and effectively accomplish the mission and strategic goals of HPBC/Hopewell Museum.	• Board of Directors	Complete board matrix and fill gaps.
6	Provide regularly scheduled training for board members, docents, volunteers and staff.	• Board of Directors	Identify specific training and make available.
7	Work toward aligning operations and practices, especially curatorial management, with professional museum standards, i.e. AAM and AASLH.	• Board of Directors	Track and report public research inquires. Earn bronze and silver StEPS Certificates.

Board of Directors Purpose, Responsibilities, Goals and Objectives

The following goals and strategies are divided into the existing committee structure of the museum, overseen by the board of directors, the executive board of directors and the executive director equally.

Organizational: Executive Board and Director (includes Administration and Finance)

I. Historic Preservation Committee
II. Curatorial/Collections Committee
III. Development Committee
IV. Education Committee
V. Event/Community Outreach Committee
VI. Maintenance Committee

Each Committee's Responsibilities:

- Designated committee member takes minutes and provides them to the committee chair. The chair provides a report every month to the executive committee, and quarterly to the full board of directors.
- Committee members are not authorized to expend any funds without appropriate approval based on financial policies as stated in the general policies and procedures.
- Cooperate with other committees where responsibilities overlap.

Board of Directors Purpose

The Historic Paris-Bourbon County Hopewell Museum bylaws establish the manner in which the board operates.

Board of Directors Responsibilities

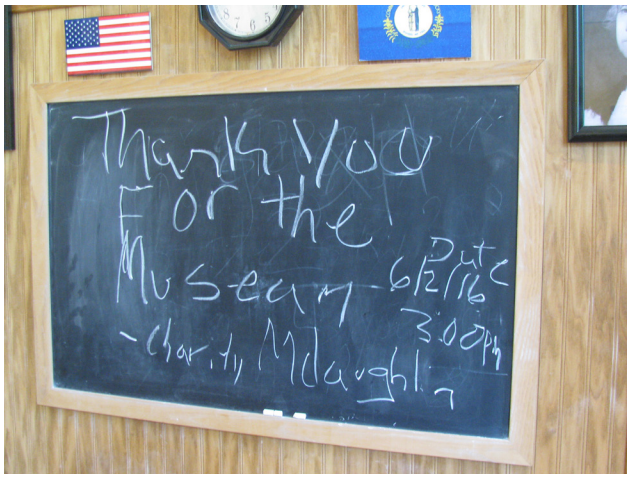
- Determine which of the proposed goals and objectives will be accomplished in the year to come.
- Identify who should assist and build partnerships as needed.
- Develop a step-by-step implementation plan.
- Determine budgetary needs per objective.

Board of Directors Objectives

OBJECTIVES	TIME FRAME	STRATEGIES	ACTION OR RESOURCES NEEDED	WHO INITIATES
Add personnel according to the projected/desired future growth of the museum.	1 Year	• Identify funding to address the unmet staffing needs of the museum. • Update the current personnel policy to include points related to diversity in hiring practices. • Consider additional staffing needs. Explore options such as AmeriCorps and a paid internship position each year.	Determine what staff positions are needed in addition to the director. Finalize job descriptions. Determine start dates, advertise, interview and hire.	Executive Board and Director Development and Finance
Establish short- and long-term desirable outcomes (ends/means) and define measures of success (benchmarks). Financial sustainability should be a focus of the board.	Ongoing Year-to-Year	• Establish a board matrix to delineate board positions and strengthen effectiveness. For example, identify positions by needed skill sets such as fund-raising, marketing, historian, preservation, maintenance, organizational, finance and special events. • Incorporate the Weil Matrix in the decision making and evaluation discussions. • Articulate the issues that motivated the original founders, the issues that led to the subsequent creation of the museum, and the current understanding of this relationship. • Provide specific guidelines to the nominating committee to match needs of board member vacancies to the skills of potential candidates. • Consider potential creative partnerships as they relate to preservation, history, health, identity and others as noted elsewhere in this strategic plan.	Address issues that motivated creation of the museum and use this discussion as a starting point to finalize a board matrix with existing board. Determine skills missing from the current board that will address gaps in operations. Provide guidelines to the nominating committee based upon the findings of board matrix. Seek specific partnerships to expand the reach and capacity of the museum.	Executive Board and Director President

OBJECTIVES	TIME FRAME	STRATEGIES	ACTION OR RESOURCES NEEDED	WHO INITIATES
Develop regularly scheduled training for board members, docents, volunteers and staff.	Annually and at special times for the new board members	• Orientation training should be made available for the director as well as all new employees and volunteers. • Staff training should be made available and include fundraising, QuickBooks, technology, marketing and other areas of professional development. • Train board members and remind them of the importance of their board responsibilities. This may include topics such as: - Ensuring good customer service-addressing interpersonal and board relationships - Enforce the board attendance policy, specifically the necessity of a quorum - Implement a formal board self-evaluation to include committee participation - Update Statement of Agreement to include committee service - Leadership development, training and mentoring - Training on museum standards, best practices and ethics • Develop a self-evaluation or pre-exit interview to conduct with board members and perhaps with long-serving volunteers and docents, prior to their departure from service. • Enable staff and board members to attend conferences focused on developing and improving museum operations.	In advance of hiring, determine what skills are needed in each position. Be specific as to what skills are expected and if needed, identify the type of training that will be made available if needed. Determine who will do the orientation training and be ready to start as soon as new hires are in place. Determine what skills board members are in need of and seek opportunities to offer training. Complete the self-evaluation or pre-exit interview for board members, volunteers and docents. Continually seek potential conference opportunities that will enhance skills of staff and board.	Executive Board and Director Executive Director, President and Vice-President

OBJECTIVES	TIME FRAME	STRATEGIES	ACTION OR RESOURCES NEEDED	WHO INITIATES
Develop volunteer and docent recruitment and management plan.	1 Year	• Develop policies. • Develop and maintain database. • Provide volunteer training in a manual format and include general policies as well as specific training for each committee. • Provide docent training via videos with volunteer portal. Include specific training for docents in customer service. • Provide an annual docent appreciation event.	Finalize policies, adopt and retain for future reference. Determine the ad hoc committees needed. Determine who will organize and lead the annual docent appreciation event.	Executive Board and Director Executive Director to Lead
Professionalize the organization: go from viable to sustainable.	Ongoing	• Continue to use the StEPS workbook for ongoing self-evaluation. • Continue increased presence in outlying communities.	Determine who will lead efforts for ongoing evaluation. Determine leadership and actions necessary to increase relations in outlying communities.	Executive Board Executive Director and President



Historic Preservation

Historic Preservation Committee Purpose

The Historic Preservation Committee is responsible for advocating for the importance of historic preservation as a component of cultural and economic capital and heritage tourism. This may be accomplished by serving as a resource and providing information to community partners and historic property owners on smart renovation techniques and adaptive reuse of historic properties.

Historic Preservation Committee Responsibilities

- Advocate for the historic preservation of buildings, structures, and sites in the community.
  - Assist with the development of planning and legal measures to protect historical resources and for creating local historic districts. Work to increase public support for these measures and assist development of governing boards for those districts.
- Educate property owners with the maintenance, restoration, rehabilitation, reconstruction, development, and certification of historic buildings, structures, and sites.
- Identify public and private funding sources applicable to preservation projects.
- Administer the HPBC/Hopewell Museum historic preservation recognition program, including the plaque program and determining the Mary Spears Van Meter Award.
- Publicize those buildings, structures, sites and/or new national register nominations that should be designated as historic districts or landmarks within their respective zoning jurisdictions.
- Proactively maintain a register of historic places in the community.
- Participate in Section 106 projects as relevant by attending public meetings, submitting official written comments, and assisting mitigation efforts.
- Assist partners in researching, securing funds, and the submission of historic markers.
- Make recommendations to the executive committee or board in accordance with established financial policies about expenditure of Sally Quillin Preservation Fund.

Historic Preservation Committee Objectives

OBJECTIVES	TIME FRAME	STRATEGIES	ACTION OR RESOURCES NEEDED	WHO INITIATES
Continue serving as advocates of historic preservation by establishing specific goals.	Year 1	• Develop policy for administering preservation funds to other entities.	Committee meeting and recommend to board	Historic Preservation Committee
	Year 2	• Public relations plan to educate the public.	Committee meeting; designated volunteer	
	Year 5	• Signage in downtown/web app/ tours/old pictures.	Explore costs	
	Year 4	• Investigate possibility of developing in-person guided walking tour(s) on a regular basis.	Tour subcommittee; explore costs and volunteer feasibility; use self-guided tour brochure as a basis	
	Year 2	• Ongoing list of resources and contractors provided by HPBC/ Hopewell Museum including criteria for being listed; update annually.	Volunteer to maintain; contact Kentucky Heritage Council	
	Year 3-4	• Plaque listing and survey.	Paid intern/volunteers	
	Year 5	• Create a supplement to update the Green Book and include historic buildings that are missing from the book.	Ad hoc subcommittee and paid interns	
	Year 1	• Develop procedures when historic structures are in peril (marketing).	Committee meeting	
	Year 1	• Organize files on historic structures and registers; work with Curatorial Committee to include in vertical file that will be accessible to the public.	Volunteer, filing cabinets	

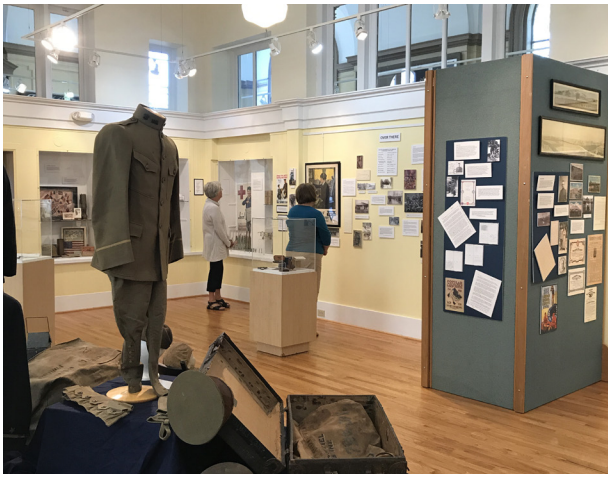
Curatorial Committee

Curatorial Committee Purpose

This committee is responsible for collecting, cataloging, safekeeping, arranging and conserving manuscripts, newspapers, objects and all historical source material of the museum. The committee shall also be responsible for planning, researching, curating, and fabricating exhibits including in-house and travelling pop-up exhibits.

Curatorial Committee Responsibilities

- Recommend acquisitions to the executive board and deaccession to the full board and implement accordingly.
- Process incoming and outgoing artifact loans.
- Target potential sources and donors and assist Development Committee in raising funds for specific collection/exhibit needs.
- Oversee collections care and security in accordance with prevailing standards as articulated by the American Alliance of Museums.
- Make recommendations to the board regarding future needs of collections and storage.
- Function as a reference resource for researchers when appropriate and reasonable.
- Plan, research, curate and fabricate exhibits including in-house and pop-up exhibits.
- Manage travelling exhibits from outside institutions and work with guest curators for special exhibits.



Curatorial Committee Objectives

OBJECTIVES	TIME FRAME	STRATEGIES	ACTION OR RESOURCES NEEDED	WHO INITIATES
Review and revise collections policy	Year 1	Review and revise to include: • A specific scope of collections and acquisition policy in accordance with the mission statement • Ethical considerations • Criteria for artifact disposals • Information about the organization's insurance policy • Separate collections policy and procedures into two documents • Add language on ability to care for collections as part of the rationale for acceptance	Committee/ ad hoc meetings	Curatorial Committee
Make collections or primary and secondary sources available to the public in accordance with museum standards.	Year 1 Year 2 Year 4 Year 2 Year 5 Year 1-4	• Create procedures and a form for access to collections • Add form to the website • Upgrade Past Perfect to online version • Track and report research inquires • Add more in-depth cataloging pertinent to the mission and intended interpretive uses. • Continue to complete a full inventory of collections. Consider if the current collection can support future exhibits and other interpretive goals.	Committee meeting Explore cost Create form for docents/staff use Laptop computer, archival/curatorial supplies	Curatorial Committee

OBJECTIVES	TIME FRAME	STRATEGIES	ACTION OR RESOURCES NEEDED	WHO INITIATES
Protect the building and collections in storage and on exhibit.	Year 1-5	• Rethink the allocation of the organization's scarce space.	Consider deaccessioning, uniform boxing, discarding unnecessary label panels	Curatorial Committee
	Year 1	• Work with Maintenance Committee to create a disaster and emergency response plan, particularly regarding museum collections.	Ad Hoc Committee, disaster response supplies (cabinet, etc.)	
Diversify exhibits to devote more attention to different learning styles.	Year 1-3	• Redesign History Hall.	Capital campaign and/or grants with Development Committee Technology using touch screen maps and auditory points with oral histories	Curatorial Committee
Develop pop-up travelling exhibits to be displayed around the county in accordance with museum best practices.	Year 5	• Explore opportunities for empty displays storefronts, at festivals/ community events, schools, etc.	Group of volunteers to organize, install, and deinstall; supplies	Curatorial Committee

Development Committee

Development Committee Purpose

The Development Committee works collaboratively with the HPBC/Hopewell Museum Board of Directors to provide leadership in planning and implementing the vision of the organization by identifying and securing the necessary financial resources.

Development Committee Responsibilities

- Manage Preservation Circle, including identifying potential PC members and recognizing current members.
- Manage and update donor information.
- Work with Marketing Subcommittee to develop messaging that explains the value of being a member of HPBC/Hopewell Museum.
- Contact prospective members in person, by phone or email to invite them to join HPBC/ Hopewell Museum and identify/cultivate current members to increase giving levels.
- Solicit feedback from members/donors.
- Contact delinquent members prior to cancellation and encourage them to renew.
- Greet and introduce new members and prospective members at events. Sit with them if possible and help them network.
- Assist staff with annual fund drive.
- Assist staff in thanking/recognizing donors and sponsors.
- Help identify and solicit sponsors and major donors.
- Help ad hoc committee with capital campaigns.

Development Committee Objectives

OBJECTIVES	TIME FRAME	STRATEGIES	ACTION OR RESOURCES NEEDED	WHO INITIATES
Develop financial resources based on annual institutional budget, staff/committee budgets, special project budgets, and long-term financial goals or capital campaigns.	Year 1 Year 2 Ongoing Year 1	• With the treasurer, seek assistance from a financial planner to help the board address concerns related to low interest on investments, future capital needs, and how to grow the endowment for long-term sustainability. • Review the Vault Store and devise strategies for increasing revenues. • Continue to review and build up emergency fund. • Work with the Marketing Subcommittee and Executive Committee to evaluate admissions price or donations only before updating new marketing materials (i.e. rack card).	Volunteer Ad Hoc Committee	Development Committee
Cultivate major donors and members for increases in giving. Include follow up, thanks and recognition, and on- going relationship building.	Ongoing Year 2 Ongoing/ Year 3 for Targeting Year 2 Year 3 Year 2 Year 1	• Continue to update and use donor database. • Evaluate feasibility of donor management software. • Plan and cultivate donor relations, particularly targeting top tier members, major gifts, and those who may be candidates for increased membership levels. • Include artifact donors in overall donor cultivation strategies. • Target marketing materials to assist with donor cultivation in partnership with Marketing Subcommittee. • Solicit feedback from members and donors and develop procedure for reporting feedback. • Create a procedure for contacting delinquent members prior to cancellation and encourage them to renew.		Development Committee

OBJECTIVES	TIME FRAME	STRATEGIES	ACTION OR RESOURCES NEEDED	WHO INITIATES
Review and revise policy for bequests.	Year 1	• Propose policy updates to board; consider including percentage amount that should be automatically put into the endowment fund unless restricted by the donor.	Committee meeting	Development Committee
Develop an implementation plan for the Preservation Circle.	Year 2	• Develop plan that includes identifying potential members and providing recognition for current PC members.		Development Committee
Continue and increase target fundraising for special funds.	Ongoing	• Particularly target Joy Vaughn Venters Memorial Children's Art Education Fund and Sally Quillin Historic Preservation Fund or other restricted funds. • Volunteers in respective committees to help target specific donors or special events (i.e. partner with local businesses for hosting a fundraiser) for particular projects (historic markers/rehab contributions, children/teens art gallery space, etc.) while Development Committee ensures fundraising efforts do not compete with other initiatives (capital campaigns, etc.).		Each Committee

Education Committee

Education Committee Purpose

The Education Committee is to implement educational programming for a diverse group of learners of all ages.

Education Committee Responsibilities

- Identify similar organizations in the community and investigate what types of programming and services they are providing. Seek partnerships where relevant.
- Review the current community and HPBC/ Hopewell Museum calendar and devise an annual calendar with a specific focus of how to integrate a youth element.
- Develop guidelines for a sustainable youth programing.
- In collaboration with teachers/school administration, create workshops for field trips. Provide consistent outreach to schools. Work with Marketing Subcommittee to market field trips.
- Work with Curatorial Committee to plan lectures/programs to accompany exhibits, as well as other educational programs offered throughout the year.

Education Committee Objectives

OBJECTIVES	TIME FRAME	STRATEGIES	ACTION OR RESOURCES NEEDED	WHO INITIATES
Develop a plan and specific curricula to host the 5th and 8th grade of students in Bourbon County each year at the museum.	Year 2	• Work w/school leadership to develop annual visitation schedule.	Volunteers to contact - teacher advisors; souvenir for visit.	Education Committee
Increase education outreach outside museum walls, particularly in schools.	Year 2 Year 1; Ongoing	• Develop classroom kits for distribution. • Van Meter History Award competition for middle and high school students using NHD rules.	Seek grants or other funds to develop curriculum and content. Subcommittee to market and judge.	Education Committee
Serve a diverse audience.	Year 3-5 Year 1-5	• Reach out to senior citizens groups. Explore ideas: "The Museum Outside," Café Americano; oral history initiatives in partnership with the library/schools.	Contact Bourbon Heights and Senior Citizens Center; explore needs – regular trips to the museum, outreach. Volunteer to develop program. Volunteer to lead programs; oral history equipment and volunteer training. Could have program to train youth.	Education Committee

Community Outreach

Community Outreach Committee Purpose

Raise awareness about the organization, including its exhibit openings, education programs, and hospitality during events, by marketing to new and current audiences.

Community Outreach Committee Responsibilities

- Committee members will contribute ideas and suggestions for special events, hospitality and relationship building training programs, including topics and potential speakers.
- Create ways to add value to the programs and special events in order to have good attendance and generate funds.
- Assist with on-site registration when possible and serve as a moderator for programs and workshops.
- Evaluate events and follow-up with attendees to ascertain which programs and services should be stopped/started/continued.
- Incorporate young professionals as committee members to assist in program and event development.
- Develop new alternatives for generating program revenue.
- Plan and implement events that raise money, create awareness, and potential new members/supporters of the organization.
- Serve as the organization's hospitality team (i.e. greeters, refreshments/meals, set-up and clean-up).

Community Outreach Committee Objectives

OBJECTIVES	TIME FRAME	STRATEGIES	ACTION OR RESOURCES NEEDED	WHO INITIATES
Conduct target audience evaluations – learn more about community interests related to museum operations, programs and services.	Ongoing Ongoing Year 2	• Use evaluation surveys to generate feedback after each event or program. • Seek millennial involvement with new committee members. • Consider allowing open website feedback and interviewing museum/program event visitors, particularly at Santa and Photography Camp Exhibit Opening.	Designated volunteers to gather feedback and analyze.	Community Outreach Committee

Marketing Subcommittee

Subcommittee Purpose

This committee has the responsibility of creating and disseminating HPBC/Hopewell Museum marketing materials to internal and external audiences.

Subcommittee Responsibilities

- Work with staff to engage the community by developing key messages, content, and branding for all audiences through various communications channels and web presences including, electronic/social media (e.g. Facebook, Twitter, Instagram, LinkedIn, etc.), newsletter, personal contact, website, telephone and printed materials.
- Build on current successes to develop creative messages that will promote the HPBC/Hopewell Museum and:
  - express value to current members;
  - encourage nonmembers to join the organization; and
  - demonstrate the value of HPBC/Hopewell Museum as an important voice of the community
- Maintain and build relationships with key partners and members of the media in conjunction with board and staff efforts.
- Work with standing committees as needed to draft messages for engaging potential HPBC/Hopewell Museum members, partners, or sponsors.
- Identify key speaking and engagement opportunities for staff and board leadership to help market and brand the HPBC/Hopewell Museum through community event participation (such as tables at festivals, a speaker's bureau where volunteers can offer to speak at community groups on a variety of topics relevant to the HPBC/Hopewell Museum).
- Vault Store: marketing materials for sale/give away.

Marketing Subcommittee Objectives

OBJECTIVES	TIME FRAME	STRATEGIES	ACTION OR RESOURCES NEEDED	WHO INITIATES
Organize a subcommittee to work on a marketing plan to increase membership and broaden the organization's audience base.	Year 1	• Increase social media efforts and implement ideas provided in the MAP on pages 8 and 9.		Community Outreach Committee
	Year 1	• Evaluate and update as needed the website, logo wear, advertising, articles, and marketing materials (rack card in particular).	Quotes/funds as needed	
	Year 2-5	• Actively promote a stronger presence with tourism.	Meet with tourism director and board	
	Year 3	• Add bilingual language on membership forms and in public relations materials.	Need volunteer who is bilingual	
	Ongoing	• Continue serving as advocates of historic preservation through ongoing public relations.		
	Year 1	• As appropriate, refine the organization's history and make it clearly available through the website and other multi-media formats.	Intern or volunteer	
	Year 2	• Determine the need for additional signage at the museum.	Funds; contact FarisGraphix or other source for quote	
	Year 1	• Work on a marketing plan to increase membership and broaden the organization's audience base.	Committee meetings	

Maintenance Committee
(Facilities, Technology and Landholdings)

Maintenance Committee Purpose

This committee is responsible for the ongoing maintenance and operational needs of the facility, such as technology.

Maintenance Committee Responsibilities

- Plan for and identify funding needs for the properties owned by the HPBC/Hopewell Museum, including Hopewell Museum and Hopewell Spring.
- Address maintenance issues as soon as possible.
- Maintain a master list of needed facility improvements and routine tasks year to year.
- Develop and keep up-to-date an emergency and disaster plan that provides for the safety and security of personnel, visitors, collections, technology and facilities.
- Maintain landscaping and other routine maintenance.

Maintenance Committee Objectives

OBJECTIVES	TIME FRAME	STRATEGIES	ACTION OR RESOURCES NEEDED	WHO INITIATES
Develop a technology plan to address anticipated needs that should be implemented over time. Consider the possibility of additional personnel and how that may impact the need for more technology (i.e. computers, printers and phones).	Year 1	• Update the telephone system to add an additional line. Provide the ability to leave messages as well as hold and transfer calls.	Quote from ATT for adding additional line and access feasibility.	Maintenance Committee
	Year 1	• New laptop and printer for curatorial office.	Funding	
	Year 1-2	• New laptop for accounting and Quickbooks upgrade.	Funding	
	Year 3 or less	• Replace director's office Sharp copy/printer/scanner.	Funding	
	Year 1	• Budget for video equipment for the surveillance of museum property. Include costs of using and maintaining the equipment as well as editing costs.	Explore options of different levels of security (# of cameras, etc.) and access cost.	

OBJECTIVES	TIME FRAME	STRATEGIES	ACTION OR RESOURCES NEEDED	WHO INITIATES
Continue to maintain and improve upon the museum building as it is HPBC/Hopewell Museum's most important artifact and example of historic preservation in the community.	Year 4-5	• Plan and budget for roof restoration.	Capital campaign feasibility	Maintenance Committee
	Year 1	• Update and computerize master maintenance schedule and list of needed facility improvements including space for storage needs.	Maintenance chair and director	
		• Obtain estimates and establish a priority funding list to execute over time. This may include but not be limited to:	Funding	
	Year1-2	- Water issues in curatorial storage, which may include reset and recrib of the front steps.		
	Year 1	- Seal and stripe parking lot		
	Year 3-5	- Community room floor (perhaps a tile floor)		
	Year 5	- Space for collections - Other storage	Evaluate feasibility of more storage	
	Year 1	• Stop using under-roof space for any kind of storage.	Plan where it should be stored	
	Year 1	• Need a designated volunteer to maintain landscaping (flower bed and mowing).	Volunteer recruitment	
Develop an in-depth emergency plan that provides for the safety and security of personnel, visitors, collections, technology and facilities.	Year 1	• Establish Ad Hoc Committee to include Maintenance and Curatorial Committees to develop a comprehensive disaster plan. Obtain a disaster kit.	Consult attorney and local emergency professionals (and invite them to serve on the committee)	Maintenance Committee
		• Be sure to address access issues when electricity or equipment (elevators) aren't working.	Need emergency generator and funds to purchase	
		• Schedule a walk-through with first responders.	Work with Outreach Committee	
		• Study the possibility of implementing a buddy system policy whenever the building is open. This may include adding or changing job descriptions of a second docent to act as a gallery monitor.	Work with Executive Committee and director for staffing	

Closing Statement

The HPBC/Hopewell Museum Board of Directors adopted the 2018 Strategic Plan by resolution on 18 day of October 2018.

Allison F. Cox

Allison F. Cox, President of Board

10-18-18

Dated

Appendix
Community Listening Session

On June 4, 2018 KLC staff conducted a community listening session at the Paris-Bourbon County Public Library. The purpose of the meeting was to obtain comments from the public on how HPBC/Hopewell Museum is performing and what areas it might consider for improvement.

Community Listening Session

Meeting Notes

Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis

- **Strengths** – What are all of the positive attributes of the HPBC/Hopewell Museum
  - Children's programming: photography, local school involvement, Free Fun Hour (Saturday program), Santa Community Party
  - Promotes and preserves local history
  - Museum building (especially for a city this size)
  - Historic preservation education
  - Revolving exhibits
  - Accessibility (including those with disabilities)
  - Venue for local artists
  - Art Walks
  - Community partnerships/collaborative efforts (ex. library, YMCA, etc.)
  - Museum provides a venue for community meetings and events
  - Museum serves as a community landmark that is an example of historic preservation
  - HPBC/Hopewell Museum programs provide the community an opportunity to connect

- **Weaknesses** – Describe the weaknesses of the HPBC/Hopewell Museum
  - Need for greater participation from younger adults (20-40 y/o)
  - Need to find ways to better connect with young adults and promote programs targeting their participation
  - No centralized calendar for all community events
  - Demographics of community hurts participation
  - Lack of awareness of HPBC/Hopewell Museum by potential visitors from outside the community

- **Opportunities** – Envision the things that are possible
  - 5th and 8th grade school field trips to the museum
  - Have a better presence on Main Street
  - Connect with the agritourism industry (ex. programs/events about the history of bourbon, tobacco, horses, etc.)
  - Multi-event collaborations
  - Promote awareness of places/things to do in Paris-Bourbon County for outside visitors
  - Diversify board and get millennials involved with committees
  - Capitalize on the programs that best drive community interests
  - Special programming for children with disabilities and those that are homeschooled
  - Playhouse driving tour for children
  - Live music events at the museum (good way to connect with a younger audience)
  - Theatre/performing arts events
  - Simple, yet engaging events
  - Networking with local businesses/hosting events at different locations
  - Rotating program venues (especially those that connect with young professionals)

Community Listening Session

- **Threats** – What could cause the HPBC/ Hopewell Museum to fail?
  - Imbalanced demographics of the community/Inability of HPBC/Hopewell Museum to connect with the younger generation
  - City and county defunding
  - Inability to maintain building over time
  - Dwindling attendance levels over time
  - Lack of diversity of new programming that would attract new audiences
  - Main Street not able to connect participants to the museum/HPBC/Hopewell Museum programs
  - Lack of community support

In your opinion:

- What are the most important things that need to be done over the next three years?
  - Grow endowment of HPBC/Hopewell Museum
  - Grow membership
  - Grow children's art education programs
  - Connect with new residents
  - Increase awareness of HPBC/Hopewell Museum through new/improved marketing strategies
  - Maintain building
  - Collaboration and partnerships with community organizations, businesses, churches, etc.
- Which of these are the priorities?
  - Increase awareness of HPBC/Hopewell Museumthrough marketing strategies

Community Engagement

- What would motivate you to be more active with the HPBC/Hopewell Museum?
  - Opportunities that allow talents to be shared (ex. music)
  - Being asked directly to participate
  - Programs on different days of the week
  - What are you as a citizen willing to do to help sustain the organization?
  - Share talents
  - Invite friends to HPBC/Hopewell Museum events (including sharing/commenting on social media posts)
  - Join museum/participate in events

Communications

- How do you want to be communicated with?
  - Local newspaper
  - Email
  - Texts
  - Written invitation
  - Social media
  - In person

Appendix
Public Survey

In order to obtain further input from the community, a public survey was hosted online from May 15th and June 10th. In total, 61 people responded to the survey. Most respondents were complimentary of the organization's quality and diversity of exhibits, events, and programs, its commitment and work on historic preservation, and its ability to educate and connect with the community.

The majority of respondents also commented that the organization's biggest challenges were raising community awareness for its activities and events and finding ways to strengthen its program offerings, build its membership, and engage a more diverse audience.

1) What do I value about the Historic Paris-Bourbon County/Hopewell Museum?

- I love that our community has a place that helps to document our great county's history and puts it on display
- The exhibits are interesting and usually do a very good job of connecting back to the community
- The way the museum connects with the community
- That it continues to be used as an educational tool for our local school systems

2) What does the Historic Paris-Bourbon County/Hopewell Museum do well?

- They do a good job of making their exhibits and programs interesting and relevant to community members
- Offers a wide variety of events and activities for all ages
- Gives the community, especially the kids in school, a better understanding of our local history as well as some exposure to fine arts

3) Are there any programs or services that the Historic Paris-Bourbon County/Hopewell Museum is not offering that they should?

- Expand the diversity of exhibits and events
- More programs for young people
- Better promotion of activities

4) Are there any program or services that the Historic Paris-Bourbon County/Hopewell Museum provides that should be expanded?

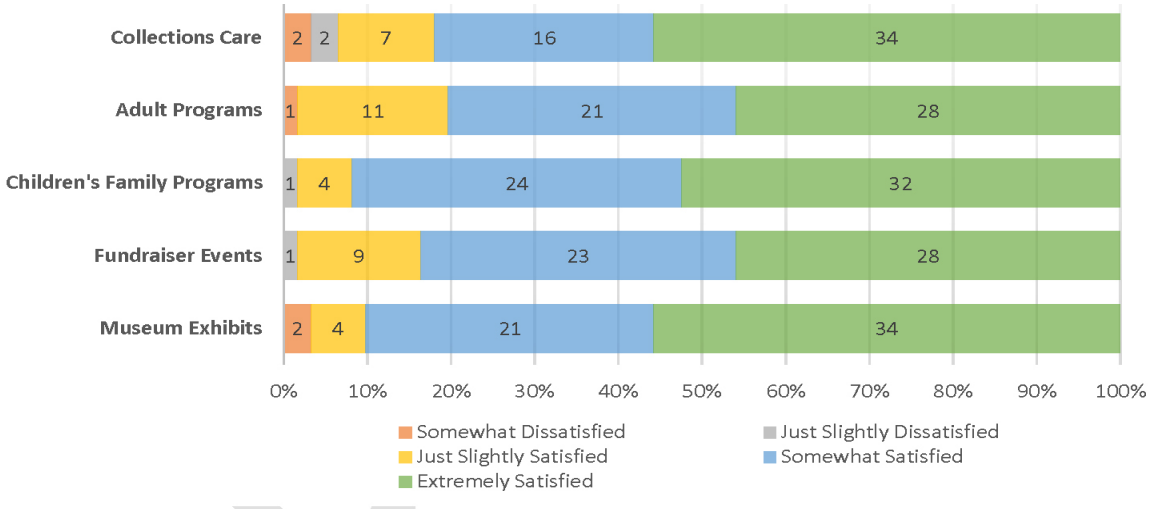
- Programs for children
- A better diversity of exhibits

Public Survey

5) Are there any programs or services that the Historic Paris-Bourbon County/Hopewell Museum is offering that I think should be stopped?

- Generic exhibits that don't further an understanding and/or appreciation of the heritage of Bourbon County and Central Kentucky.
- Anything out dated

6) How satisfied are you with the following:



7) The most common complaint I hear about the Historic Paris-Bourbon County/ Hopewell Museum is?

- More people don't know about wonderful things that are going on at the museum
- The exhibits don't change very often
- Hours of operation
- It is elitist. But I think surly that is getting eradicated.

8) I believe we could remedy this problem by___.

- More efforts to advertise around town, and increasing the social media presence. Interacting with the community and posting more frequently on platforms like Instagram or Facebook could increase interest.
- Expanding the scope of speakers and exhibits.

9) In my opinion, the three most important things the Historic Paris-Bourbon County/ Hopewell Museum must focus-in the next two to three years are:

- Exhibits/Events/Programs
- Membership
- Awareness

Appendix
Board of Directors Evaluation

Option 1: Board of Directors – Self-Evaluation Form

Board Member: _____

1. How do you assess your contribution to this organization?

   (You might want to include such things as: attendance at board meetings, participation, promotion and fundraising, committee work, or any other areas on which you would like to comment.)

2. Do you feel that your financial contributions to the organization are at a level which is "personally significant" for you? Why or why not?

3. How has our organization invested in your growth as a board member?

4. What would you like to contribute to or involve yourself in, if you were to serve another term?

5. How would you like our organization to invest in and facilitate your personal development as a board member?

6. What changes would you suggest, as a board member, in the operation and involvement of the board?

Board of Directors Evaluation

Option 2: Board of Directors – Self-Evaluation Form

Consideration		Strongly Agree	Agree	Unsure	Disagree	Strongly Disagree
1.	Board has a full and common understanding of the roles and responsibilities of the board.					
2.	Board members understand the organization's mission, vision, and services/programs.					
3.	Structural pattern (board, officers, committees, executives and staff) is clear, delineated in bylaws, and followed by board.					
4.	There are an adequate number of well-functioning board committees and other work groups.					
5.	Board members actively participate in strategic planning and ongoing strategic thinking.					
6.	The board has adopted, and uses, explicit measures of progress toward identified outcomes.					
7.	Board attends to policy-related decisions which effectively guide operational activities of staff.					
8.	Board receives regular reports on finances/budgets, service/program performance and other important matters.					

Board of Directors Evaluation

Option 2: Board of Directors – Self-Evaluation Form

Consideration		Strongly Agree	Agree	Unsure	Disagree	Strongly Disagree
9.	Board helps set fundraising goals and is actively involved in some aspect of fundraising.					
10.	All board members make a personal financial contribution to the organization.					
11.	Board effectively represents the organization to the community.					
12.	Board meetings facilitate, focus and progress on important organizational matters with reporting kept to a minimum.					
13.	Board meetings are adequate in length and held at the right time of the day.					
14.	The board reviews the compensation of the executive director based on industry standards.					
15.	Board has approved comprehensive personnel policies which have been reviewed by a qualified professional.					
16.	All necessary skills, stakeholders and diversity are represented on the board.					

Board of Directors Evaluation

Option 2: Board of Directors – Self-Evaluation Form

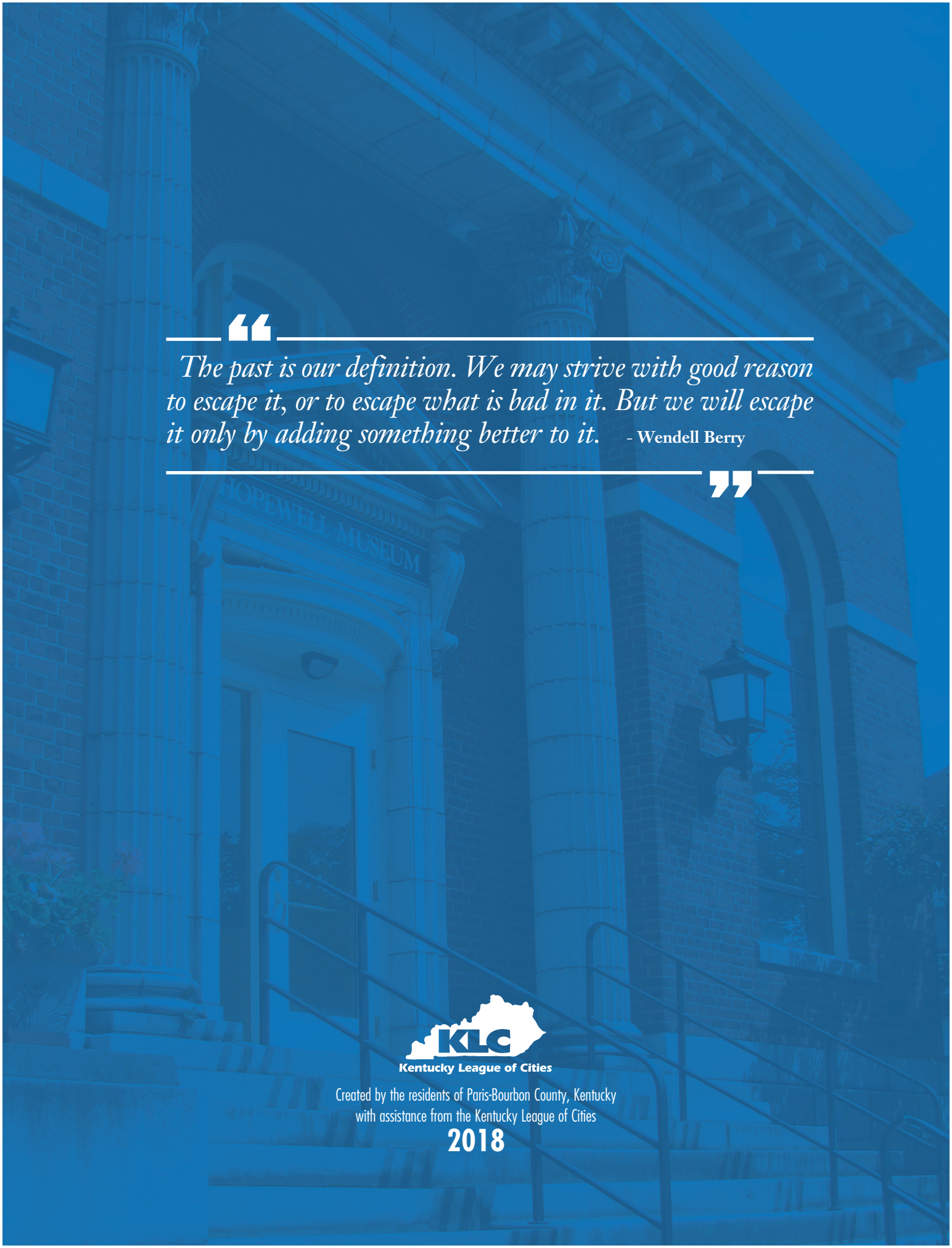
Consideration		Strongly Agree	Agree	Unsure	Disagree	Strongly Disagree
17.	Board culture encourages and welcomes open discussion, even when members disagree.					
18.	Board is attentive to building leadership capacity on both board and staff.					
19.	Board regularly assesses itself as a whole and also board member participation individually.					
20.	Board has a packet of materials for new board members and an orientation process for them.					
21.	Board has a board agreement, a whistleblower policy and a conflict of interest policy that all board members must sign and follow.					
22.	Strategic process is in place for developing the board.					
23.	The board regularly monitors financial performance and projections.					
24.	Board members are sufficiently knowledgeable to ask meaningful questions about finances and financial management.					

Board of Directors Evaluation

Option 2: Board of Directors – Self-Evaluation Form

Consideration		Strongly Agree	Agree	Unsure	Disagree	Strongly Disagree
25.	The board reviews the audit report and has an opportunity to ask questions of the auditor at an exit conference.					
26.	The board reviews the 990 before filing.					
27.	Board discussions focus on the organization's future, not its past.					
28.	Each member of the board feels involved and interested in the board's work.					

Credit: Center for Nonprofit Leadership at Adelphi University School of Social Work



The past is our definition. We may strive with good reason to escape it, or to escape what is bad in it. But we will escape it only by adding something better to it. - **Wendell Berry**

Kentucky League of Cities

Created by the residents of Paris-Bourbon County, Kentucky
with assistance from the Kentucky League of Cities

2018