### Strategic Plan Format and Definition of Terms

- **Mission Statement:** The overall function of the Society.
- **Vision Statement:** The desired future state of the Society and what it intends to be.
- **Value Statements:** The guiding principles and expectations which guide decision making enabling the Society to achieve its mission and address its vision.
- **Strategic Goals:** Broadly stated organizational goals that provide direction to support the Society’s mission, vision and values.
- **Strategic Objectives:** Concise statements describing what the Society must do well in order to execute a strategic goal.
- **Strategic Tactics:** Specific actions the Society will undertake to accomplish a strategic Objective.
- **StEPS:** The Standards and Excellence Program for history organizations was developed by the American Association for State and Local History (AASLH).

### Strategic Plan

#### Introduction

The McHenry County Historical Society Board of Directors adopted this strategic plan on June 24, 2019. It will be presented to Society members at the annual meeting on Aug. 19, 2019. The purpose of this document is to help direct the work of the McHenry County Historical Society, as it strives to fulfill its mission, and to ensure future decisions are made with the best interests of the Society in mind. Critical issues affecting the future of the Society were identified through data collection and led to the development of three strategic Pillars. Core goals were created to meet the Society’s mission and vision. This strategic plan spans the three-year period from July 2019 through June 2022. It, and tactics for achieving our objectives, will be reviewed annually – in accordance with the StEPS self-assessment program.

### Critical Issues

1. The economy, changes in charitable donation rules and competition for financial support
2. The diverse needs of potential audiences
3. Building and maintaining membership
4. Meeting space and location requirements
5. Facility maintenance, repairs and improvements

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**OUR MISSION**

We engage and educate current and future generations by preserving and sharing McHenry County history.

**OUR VISION**

The McHenry County Historical Society & Museum endeavors to be a hub for collection, preservation and educational outreach reflecting McHenry County’s history.

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**OUR VALUES**

- Integrity
- Innovation
- Inclusion
- Relevancy
- Outreach
- Leadership
- Sustainability
- Stewardship
- Knowledge
- Collaboration
- Accessibility
The 2019-2022 strategic plan of McHenry County Historical Society has been adopted by our Board of Directors to ensure the continued improvement of Society operations and to enhance the fiscal condition needed to fulfill the Society’s vision of serving as a hub for local history, preservation and educational outreach. The plan organizes the efforts of the Society around three strategic pillars: Facilities, Fundraising/Development, and Outreach. Each pillar impacts and interacts with the others. The interdependency of the three pillars is evidenced by the eight strategic goals.

**Strategic Goals & Objectives 2019-22**

**Facilities Goal:** Develop a thorough understanding of the strengths and weaknesses of each of the Society’s buildings. Align physical space requirements with projected needs and with the direction we chart for this organization.

**Objectives**

1) Complete an in-depth analysis of existing facilities - including the history, location, capability, uses, and condition.
2) Develop policies and execute an action plan that supports the ongoing improvement, accessibility and sustainable practices of our museum, collections, exhibits, sites and landscapes.

**Fundraising/Development Goal:** Grow current revenue streams and identify new revenue sources to support the continued growth and development of the Society.

**Objectives**

3) Complete a thorough analysis of current correlation between donor and members.
4) Examine our membership program and identify opportunities for growth.
5) Introduce a development committee to establish approaches to philanthropic giving, campaign appeals, grant seeking, and donor relationship management.

**Outreach Goal:** Engage people of all ages, ethnicities and backgrounds in the rich history of McHenry County.

**Objectives**

6) Based upon analysis of the interests and needs of the Society’s various audience groups, enhance our program offerings to widen our appeal.
7) Create and implement a structured volunteer management program to enhance the recruitment, training, and engagement of volunteers.
8) Develop cooperative relationships and community partnerships to expand awareness and access.
Staff

Kurt Begalka, Administrator
Nancy Roozée, Office Manager
Kira Stell, Curator
Michelle Hujer, Volunteer and Outreach Coordinator

Board of Directors

Mary Ott, President
Mary Ellen Heelan, Vice-President
Molly Walsh, Treasurer
Arlyn Booth, Secretary
Kathy Bergan-Schmidt
Judy Beth-Hervert
Rob Cisneros
Maggie Crane
Bob Frenz
Catherine Jones
Henry Kenyon
Lonni Oldham
Paula Rieghns
Dan Ring
Don Rose
Dan Shea
Bob Wagner