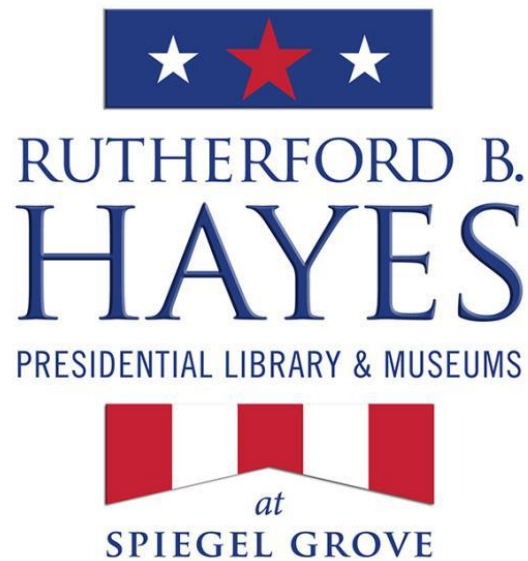


Strategic Plan of the
Rutherford B. Hayes Presidential Library & Museums



A New Path Forward
August 2017

Introduction

The Hayes Presidential Library & Museums experienced dramatic, transformational change as a result of the last strategic plan, *Building for the Next 100 Years*, which was adopted in 2013 and saw us through our centennial celebration in 2016. The central feature of that plan was our 100th Anniversary and an intention to set the organization on a route to modernization.

During the process of developing this Strategic Plan, a recurring theme was our identity. With so much new about our organization, this plan helps define who we are. We want to infuse our operations with a uniqueness that becomes a hallmark, attesting to the creativity and distinctiveness of our approach to everything we do, from the way we greet visitors to the way we maintain our property and engage the public with programming.

A key feature in this plan is the reorganization of staff to form an entirely new division: Curatorial and Education. Here, we revolutionize the way people learn about Rutherford and Lucy Hayes by helping them apply skills demonstrated by the president and first lady, such as conflict resolution, to modern situations. Our goal is to teach good history while helping people develop tools for addressing real life problems such as racism, bullying and drug addiction. We also want to create an educated American citizenry who understands how government functions and the role they can play in it.

Having established a new identity and substantially updated our infrastructure, the Hayes Presidential Library & Museums has put itself on a new path forward, ensuring that we are a dynamic and evolving organization, responsive to the needs of the public we serve and prepared to take our place on a national stage.

Acknowledgements

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HPLM Board of Trustees members: Jennifer McFarland Barrett, Sean Decatur, Mark Wagoner, Jim Daubel, Richard Smith, Tom Kern, Ted Prasse, Burke Hayes, Tom Hoffert

HPLM Building and Grounds committee members: Rich Geyman, Ralph Billow, Jim Fails

HPLM Staff: Meghan Wonderly, Mary Lou Halbeisen, Tom Smith, John Ransom, Dan Baker, Dustin McLochlin, Becky Hill, Kristina Smith, Kathy Boukissen, Joan Eckermann, John Bell, Gil Gonzalez, Mary Lou Rendon, Lisa Stuart, Jacque Baker, Christie Weininger, Elizabeth Davenport, Nan Card, Julie Mayle, Gil Gonzalez, Judie Frank, Jean Blechschmidt, Barb Moellman, John Bell, Dan Baker, Randy Bostater

Mission of the Rutherford B. Hayes Presidential Library & Museums

The Rutherford B. Hayes Presidential Library & Museums illuminates the lives, legacy and era of President and First Lady Hayes, interprets the American Presidency, preserves Spiegel Grove and relates the importance of each to modern America.

Value Statements for the Rutherford B. Hayes Presidential Library & Museums

Seek, invest in, and retain staff, administration, and governing board members who are committed to sustaining the Hayes Presidential Library & Museums using the highest professional standards of **leadership, integrity, and accountability.**

Ensure **authenticity** in presenting the material that the Hayes Presidential Library & Museums collects and the stories it tells.

Provide an environment that fosters **staff creativity** by providing the **freedom and tools to innovate.**

Ensure that the buildings, grounds, collections, and staff are **accessible** to all people who want to enjoy and learn from the richness of the Hayes Presidential Library & Museums.

Maintain and **preserve the historical integrity** of the Hayes Presidential Library & Museums buildings, grounds, and collections.

Inspire people to ask questions and **be curious** about what they see and learn within the context of history and nature.

Strengthen **connections** among staff, the board of trustees, volunteers, visitors, and other audiences so all feel part of the Hayes Presidential Library & Museums **community.**

Vision for Rutherford B. Hayes Presidential Library & Museums

The Hayes Presidential Library & Museums will evolve in ways that provide distinctive public programs while it monitors, adopts and helps drive national standards in the museum field.

Hayes Strategic Plan 2017

A. Curatorial and Education:

Education: Through the lens of Rutherford B. Hayes and his presidency and his wife Lucy Hayes and her causes, create a dynamic and distinctive array of educational programs, events, and exhibits that provide experiences and provoke discovery that is meaningful in modern America

1. Create a structure that builds educational programming
 - a. Hire a curator that drives a new Curatorial and Education Department that consists of the events coordinator, the new associate curator of artifacts, education coordinator, part-time house guides, and volunteer docents [Christie—June 2017]
 - b. Create a system by which the Curatorial and Education Department functions and house guides see themselves as educators and perform educational tasks outside the Hayes Home [Dustin—Sept 2017]
 - c. The manuscripts department (curator of manuscripts and associate curator of manuscripts) will remain an independent department but will collaborate closely with the new curatorial and education department [Christie—June 2017]
 - d. Budget an increase for professional development including conferences and journal subscriptions (i.e. White House History, Ohio History and Civil War Journals, Organization of American Historians, etc.) [Christie—March 2018]
2. Create a system of planning, reporting, and outcome based performance evaluation for programs and events
 - a. Monitor social media comments from visitors such as on Trip Advisor and Facebook; collect and document comments as deemed appropriate [Kristina—Ongoing]
 - b. Set objectives for tours, events and exhibits; design survey instruments for attendees to determine if we are meeting our objectives [Dustin—Ongoing]
3. Re-examine modern interpretations of the 1876 presidential election and Hayes' presidency
 - a. Form an advisory committee consisting of historians to discuss issues and ways to bring them into the public arena, focusing specifically on the "Compromise of 1877" and Hayes "ushering in the era of Jim Crow" [Dustin—Dec 2017]
 - i. Identify questions to be addressed at meetings of the advisory committee
 - ii. Act on recommendations for ways to present findings
 - b. Research the historiography of the Hayes presidency and how it has changed over the years [Dustin—Sept 2020]
 - i. Materials at the Hayes Library
 - ii. Materials at other institutions
 - c. Write and present papers about the Hayes presidency at history conferences around the United States [Dustin—Sept 2020]
 - i. Conduct research of original documents at the Hayes Library and elsewhere
 - d. Publish articles about the Hayes presidency [Dustin—Sept 2020]
 - e. Change existing core exhibits and create rotating exhibits as appropriate when new information is found [Kevin—Ongoing]

- f. Update existing programs and events and implement new programming as information is found [Joan, Kevin, and Education Coordinator—Ongoing]
- 4. Become known as a center for political knowledge and affairs
 - a. Develop political education programs for high school students and public sectors [Education Coordinator—Sept 2020]
 - i. Create a program on the Electoral College
 - ii. Create a program for individuals reaching the age to vote
 - iii. Create programs that encourage people to vote
 - iv. Set up live feed in the museum of important political events
 - v. Develop basic programs on how the United States federal government functions
 - b. Host naturalization ceremonies [Christie—Sept 2020]
 - c. Host meetings of League of Women Voters and/or similar entities [Christie—Sept 2020]
 - d. Develop a Speakers Bureau and related brochure [Education Coordinator—July 2018]
 - e. Take an active role in other relevant historical organizations such as SHGAPE [Dustin, Kevin, and Christie—Ongoing]
 - f. Post relevant works of other historians to website [Dustin and Nan—Ongoing]
 - g. American Presidents Film and Literary Festival [Everyone—Ongoing]
 - h. Develop “Trapped” HPLM [Joan and Education Coordinator—June 2018]
- 5. Create programs that examine Rutherford and Lucy’s thoughts about the world and service in order to provoke conversations about and solutions to contemporary issues [Education Coordinator and Joan—Sept 2020]
 - a. Hayes Administration Policies
 - i. Free public education for all
 - ii. Social Movements
 - a. Civil Rights/Racism
 - b. American Indian Rights
 - c. Women’s Rights
 - iii. Service to country
 - iv. Mental Illness
 - v. Support temperance, but opposed prohibition
 - vi. Prison reform
 - vii. Immigration
 - viii. Industrial Revolution and Labor
 - ix. Trends in Intellectualism
 - x. Bringing the country together—unity—conflict resolution
 - xi. Gilded Age politics/corruption/political parties (time sensitivity)
 - xii. Veterans affairs
 - xiii. Civil Service Reform
 - b. Develop specialty tours of the Hayes Home such as servant and art tours

Collections: Ensure that collections support the mission of the Hayes Presidential Library & Museums. Increase public access to collections for research and educational purposes.

6. Develop systems that ensure that the artifacts, manuscripts and library collections are accessible to all visitors
 - a. Make specific collections accessible to programs
 - i. Create a program to display collections on a rotating basis i.e. “artifact of the month” [Kevin—Jan 2018]
 - ii. Identify artifacts that are stable enough to take off site [Kevin—Ongoing]
 - iii. Expand outreach programs i.e. Life Scholars Program, Membership 411, local history artifact roundtable, digital walking tour, interactive map showcasing historical landmarks around Fremont [Nan and Kevin—Sept 2020]
 - iv. Develop STEM programs on topics such as roller coasters, ice harvesting, flight, and the disputed election of 1876 [Nan and Education Coordinator—Sept 2020]
 - a. Develop on site and travelling versions of these programs
 - b. Create an endowed fund for artifacts and manuscripts so items could be purchased as they become available [Christie and Kathy—July 2019]
 - i. Find a legacy gift to start the endowment
 - c. Identify pieces that could be reproduced or created for various uses
 - i. Reproduce collections for hands-on use in exhibits [Kevin—Ongoing]
 - ii. Reproduce collections for hands-on use in education programs [Kevin and Education Coordinator—Ongoing]
 - iii. Reproduce collections that could be sold in the museum store [Kevin and Lisa—Ongoing]
 1. Iconic pieces in our collection
 2. Pieces that tie into rotating exhibits
 - iv. Create souvenir photo books to sell in the museum store [Gil—Aug 2018]
 - v. Publish centennial tour books to sell in the museum store [Nan and Gil—Aug 2018]
 1. Sandusky River boat cruise
 2. Historic sites in Fremont (Bus tour)
 3. Lake Erie Jet Express Tour
 - d. Seek a grant and digitize the Hayes family albums photograph collections [Kathy and Gil—Jan 2019]
 - e. Work with Marketing Department to gain greater exposure to the Hayes Presidential Library & Museums and consequently its collections (See Public Relations goal)
 - i. Develop videos to post to website and social media using our manuscript collection; consider monthly [Nan and Kristina—Jan 2018 and Ongoing]

- ii. Facebook live sessions highlighting an artifact [Kevin and Kristina—March 2018 and Ongoing]
 - iii. “Did You Know” column in the *Statesman* [Kevin and Julie—Oct 2017]
 - iv. Work with Digital Public Library of America to post digital copies of 5,000 photographs from Lake Erie’s Yesterdays [Nan and Julie—July 2018]
 - v. Create a brochure highlighting the Frohman collections for distribution to libraries, historical societies and museums [Nan and Kristina—July 2018]
 - f. Have an art historian consultant review and evaluate artwork in the collections for the purpose of programming [Kevin—Jan 2019]
 - i. Understanding the “art” of the artwork
- 7. Ensure that the collections staff has the expertise and the tools needed to care for and make collections available
 - a. Hire and train new staff as existing staff gets ready to leave [Christie and Tom—Ongoing]
 - i. Focus specifically on manuscript, library and photography staff
- 8. Expand outside relationships with collections issues experts [Kevin and Julie—Ongoing]
- 9. Give collections a greater voice by enhancing the Collections Committee
 - a. Create a Curatorial and Education Committee; Give it a standing similar to the Development and Buildings and Grounds Committee [Christie—Aug 2017]
 - i. The current Collections committee would become a sub-committee of the Curatorial and Education committee
 - b. Identify community members and colleagues from area museums to join staff as part of the committee [Christie and Dustin—Jan 2018 and Ongoing]
- 10. Ensure that collections are well preserved and secure
 - a. Develop a prioritized list of materials in need of conservation and identify funding sources [Kevin, Nan, and Kathy—Jan 2019]
 - b. Find solutions for current collections storage space problems (running out of space) [Kevin and Nan—July 2019]
 - i. Reassess newspaper and other collections
 - c. Update the collections section of the disaster plan [Kevin—Dec 2017]
- 11. Continue to provide genealogical databases, programs and resources for researchers [Becky—Ongoing]
- 12. Continue to provide local history programs and resources [Nan and Education Coordinator—Ongoing]
- 13. Continue to meet the highest standards of collections management as set by industry professional groups such as the American Association of Museums [Kevin and Nan—Ongoing]

- B. Buildings and Grounds:** Ensure buildings and grounds of the Hayes Presidential Library & Museums are secure, maintained and accessible, cost effective, and the historic charm and beauty of Spiegel Grove is preserved.
1. Make sure that the buildings, grounds, collections, and people are secure
 - a. Update monitored security systems in the museum and library [John—Dec 2017--\$12,000-25,000]
 - b. Purchase monitored security equipment for the Hayes Home and grounds [John—Dec 2018]
 - c. Install electronic door access for strategic places around buildings [John—Dec 2017--\$300-1,000]
 - d. Update the paging system in the museum and library [John – Dec 2017--\$3,000]
 - e. Look into installing a paging system for the Hayes Home [John—Dec 2018]
 - f. Develop a key holder policy [Christie—Jan 2018]

 2. Make sure staff and volunteers are up to date on security and safety needs
 - a. Annually review and update security and safety manual [Tom Smith—Ongoing]
 - b. Using manual, develop system to ensure staff are trained in security and safety procedures [Tom Smith—Aug 2017]
 - c. Identify sources and enroll staff in courses to learn security and safety techniques such as CPR [Tom Smith and John—Ongoing]
 - d. Invite Ohio Bureau of Workers Compensation to conduct safety inspection [Tom—Sept 2018]

 3. Make sure that the buildings and grounds are maintained and preserved
 - a. Annually review, update, and post maintenance plan that can be used to get work done and help establish funding needs and priorities [John—Ongoing]
 - b. Develop an equipment maintenance, upgrade, and replacement schedule [John—Jan 2018]
 - c. Evaluate and prioritize trees for potential removal, trimming, and replacement [John—Ongoing]
 - d. Update Asset Manager tree database [John and Elizabeth—Dec 2018]
 - e. Investigate the possibility of being designated an arboretum
 - i. Apply for Level 1 status on Arb.net [Christie and Elizabeth – December 2018]
 - ii. If achieved, comply with all policies [Christie—July 2018]
 - f. Create a plan to protect the trees from Gypsy Moths
 - i. Contact the Ohio Department of Natural Resources about grants for spraying [Christie – July 2017 DONE]
 - g. Create a “Friends of Spiegel Grove” group that can help with Gypsy Moth treatments and other aspects of maintaining Spiegel Grove [John and Christie – March 2018 and ongoing]
 - h. Implement a recycling program for staff and visitors [B&G Committee Chair, January 2018]

4. Make sure capital needs are addressed and taken care of
 - a. At bi-monthly meeting of Building and Grounds Committee, continue to review, update, and prioritize capital needs [B&G Committee Chair—Ongoing]
 - b. Develop a plan to make the main entrance to the property safer and more easily accessible while preserving the historical elements of the grounds [Christie—Dec 2018]
 - i. This includes repaving the roads and parking lot and if possible enlarge parking space and create a walking lane
 - ii. Also include a new entry way configuration
 - c. Work with the Ohio History Connection to follow and fund “Energility” Energy Audit and recommendations
 - i. Submit proposal—update HVAC controls, replace steam boilers in Hayes Home and upgrade HVAC controls, install new high efficiency chillers, replace hot water boilers, replace steam boiler at museum and library building [Christie—June 2017]
 - ii. Carry out proposal [Christie—[Begin July 2018]
 - d. Make and implement an overall library redesign plan to improve use of space and appearance, technology, and security [Christie and Becky—June 2018]
 - i. Carry out proposal [Christie and Becky—July 2018]

5. Ensure that site technology is up to date
 - a. Contract with an IT provider to conduct overall technology assessment [Mary Lou—Jan 2018]
 - b. When financially feasible upgrade wi-fi capability in the library and museum [Mary Lou—Jan 2018]

- C. **Public Relations/Marketing:** Ensure that national, state, and local audiences are aware of the Hayes Presidential Library & Museums and its programs and that annual visitation numbers increase
 1. Develop an overall operational structure for a Communications Division at the Hayes Presidential Library & Museums
 - a. Create a description purpose for the Communications Division [Kristina—Dec 2017]
 - b. Working with HR develop a strong internship program to build the Division [Kristina and Tom—July 2018]

 2. For marketing and public relations purposes, ensure that national audiences are aware of the Hayes Presidential Library & Museums

- a. Develop stronger connections with local TV network affiliates in Toledo and Cleveland to then connect with national network [Kristina—Sept 2018]
 - b. Focusing on specific areas and angles reach out to production companies that have relationships with television networks like Discovery Channel, History Channel [Kristina—Sept 2020]
 - i. Develop talking points
 - ii. Develop a marketing focus on electoral college and other current events that tie in with the mission of the Hayes Presidential Library & Museums
 - iii. Find other stories to pitch to the production companies while they are here (This could include partnering with other sites/attractions)
 - c. Focusing on specific areas and angles develop marketing strategies for national publications such as Civil War magazines and train enthusiasts [Kristina—Mar 2018]
 - d. Increase audiences and visitors by expanding uses of social media [Kristina—Ongoing]
 - i. Explore additional platforms such as Pinterest
 - ii. Evaluate media tools to see if they are being used
 - iii. Use Facebook live to offer educational/interactive talks
 - e. Develop separate marketing package for Spiegel Grove and natural history audiences [Kristina—July 2018]
3. Ensure that local and regional audiences are aware of the Hayes Presidential Library & Museums and attend its programming
- a. Develop contact list for different types of reporters – political writers, travel writers, home and garden writers, etc. [Kristina—Sept 2017]
 - b. Develop pre-event programs for news people having free food, behind the scenes tours, etc. [Kristina—May 2018]
 - c. Expand presence in Columbus through purchased advertising such as television and billboards [Kristina—Sept 2017]
 - d. Expand presence in Cleveland through purchased advertising such as television and billboards [Kristina—Sept 2018]
 - e. Install a web cam on the grounds and make it available to Toledo TV stations [Kristina—Sept 2019]
 - f. Working with the Education Department develop separate marketing package for Spiegel Grove
 - i. Focus on birding at Spiegel Grove—“Birds at Spiegel Grove” [Kristina and Education Coordinator—May 2018]
 - ii. Focus on trees at Spiegel Grove [Kristina and Education Coordinator—May 2019]
4. Develop a marketing plan so marketing can be more intentional
- a. Figure out a way to collect and use zip codes [Kristina and Lisa—June 2018]

- b. Develop a marketing/public relations evaluation system to ensure effective and efficient procedures [Kristina—Apr 2018]
 - i. Develop a marketing evaluation to test success/failure of marketing strategies
 - 1. Use survey monkey
 - 2. Use college class or intern
5. Enhance relationships with other presidential libraries
 - a. Develop a group representing the Ohio presidential sites [Christie and Kristina—Jan 2019]
 - i. Meet to continue discussion of previously planned programs
 - ii. Plan other events and marketing activities
 - b. Explore possibilities to connect with presidential sites nationally
 - i. Attend AASLH annual meetings and connect with presidential committee [Christie and Staff—Sept 2017]
 - ii. Make sure that the Hayes Presidential Library & Museums is on other presidential sites' mailing lists and they are on ours [Kristina—Sept 2017]
 - iii. Send our rack cards to other presidential sites [Kristina—Sept 2017]
 - iv. Invite other presidential sites to the Hayes events [Kristina—Ongoing]
 - v. Attend other presidential sites' events [Staff—Ongoing]
6. Enhance relationship with the general public
 - a. Hold a special activity for Lucy's birthday, such as serving lemon cupcakes free to guests on the Hayes Home verandah [Kristina and Lisa—Aug 2018]
 - b. Develop a special admission promotion, such as the 19th person on the 19th day of each month gets in free [Kristina and Lisa—Jan 2018]
 - c. Develop other special admissions promotions on a periodic basis [Kristina, Lisa, and Joan—Jan 2019]
 - i. Consider planning an event where the museum would be open for 24 hours
 - d. Supply staff members with free admission passes on an annual basis for distribution to attract new audiences [Kristina—Jan 2018]
 - e. Create unique customer service experiences for visitors
 - i. Come up with a creative way to give the museum/library closing announcement [Kristina and Lisa —Jan 2018]
 - ii. Develop other creative customer service opportunities in the spirit of "Walt Disney" and "Dennison Railroad Depot Museum" [Lisa —Jan 2019]
 - iii. Have a mascot, such as a squirrel, to promote the site [Kristina, Lisa and Marketing Group—Apr 2018]
 - 1. Mascot themed signage on grounds to engage walkers
 - 2. Mascot writes posts for Facebook, possibly has own twitter account
 - 3. Stuffed or flat mascot could travel
 - 4. Create mascot videos

- iv. Find ways to tap into the “Lemonade Lucy” concept and use as an educational opportunity to explain why she was not called that in her lifetime [Kristina, Lisa and Education Coordinator—Jan 2019]
 - 1. Serve guests lemonade at designated locations or times of day
 - f. Continue to monitor social media and be responsive to the public’s comments [Kristina, Lisa and Christie —Ongoing]
- D. **Human Resources:** Enhance the professional environment at the Hayes Presidential Library & Museums by creating a culture of forward thinking through open lines of communications, openness to new ideas, and positive working conditions
 - 1. Evaluate staff benefits and upgrade wherever needed and/or necessary
 - a. Review Health Insurance options and adopt changes accordingly (based on budget) [Tom and Christie—Jan 2018 and Ongoing]
 - i. See if the Hayes Presidential Library & Museums can be included in the Ohio History Connection’s health insurance [Tom—Oct 2017]
 - ii. Review employee/employer split on insurance premiums [Christie—May 2018]
 - iii. Investigate consortium options with entities such as chambers of commerce or museum organizations [Tom—Oct 2017]
 - iv. Monitor federal health care regulations, discuss potential impact on employees and adjust planning as necessary [Tom—Ongoing]
 - b. Evaluate retirement plan and upgrade where needed and/or necessary [Tom and Christie—May 2018]
 - i. Investigate OPERS as a retirement plan option [Tom—Mar 2018]
 - ii. If we keep current retirement plan (TIAA-CREF), consider reinstating the employer match [Christie—May 2018]
 - iii. Update summary plan description [Tom-Feb 2018]
 - 2. Adhere to Department of Labor policies in event of an audit
 - a. Continue with plan to separate employee files [Tom—Ongoing]
 - 3. Evaluate compensation program and eliminate any disparity in similar employee wages and upgrade wherever needed and/or necessary
 - a. Gather data on industry standards from Department of Labor for salary levels and use to develop a strategy for salary increases; request salary information from the following entities: [Tom—Apr 2018]
 - i. Ohio History Connection
 - ii. American Association for State and Local History
 - iii. American Alliance of Museums
 - b. Develop a strategy for increasing salaries [Christie and Tom—Ongoing]
 - i. Consider equity adjustments based on success of endowment campaign fundraising

- ii. Make every possible effort to give annual wage increases based on current C.P.I (consumer price index) obtained from the Bureau of Labor Statistics
 - iii. Consider merit increases based on operating budget, results of job reviews and other considerations
 - iv. Review annually the classification of exempt vs non-exempt employees (Example: Interstate Commerce employees)
- 4. Create a goals, accomplishments, and career development plan for staff
 - a. Develop an evaluation instrument to be conducted on an annual basis [Tom and Christie—July 2017]
 - b. Identify and provide funding for career development opportunities (Christie – ongoing)
- 5. Align staff talents, skills, and job duties with organizational goals
 - a. Perform a job analysis to evaluate staff talents and skills compared to existing job descriptions [Tom and Christie—Dec 2017]
 - i. Make staffing adjustments
 - b. Formalize practice of having reception desk, tour guide and docents cross trained [Kevin and Lisa—Ongoing]
 - c. Identify staff positions to be supported by an endowment [Kathy, Tom, and Christie—Ongoing]
- 6. Seek additional help to support goals of all departments of the Hayes Presidential Library & Museums
 - a. Create a formalized internship program to support all areas [Tom and Department Heads—July 2018]
 - b. Evaluate and modify structure that best facilitates departmental use of volunteers, including recruitment, relationship building, training [Joan and Tom—July 2018]
- 7. Build people centered (visitor and coworker) culture at the Hayes Presidential Library & Museums
 - a. Launch personalized Ohio History Connection “Staff Cares” program in all areas of the Hayes Presidential Library & Museums [Tom and Lisa—Sept 2020]
 - i. Bring in fun experts to do workshops on an annual basis [Lisa and Tom—March 2018 and Ongoing]
 - ii. Develop methods that ensure Staff Cares and other programs are implemented by staff on a daily basis [Lisa and Tom – ongoing]
 - iii. Develop an evaluation procedure to ensure program’s effectiveness [Lisa, Tom and Christie, December 2018]
 - b. Set up training programs for staff and volunteers to convey institutional values and policies
 - i. Identify museums that have exemplary work practices and set up potential field trips to go to those museums [Staff—Ongoing]
 - ii. Set up safety/emergency training workshops, hold fire and tornado drills, etc. [Tom—Sept 2017]

- iii. Hold workshops for supervisory staff to educate them on HR liability issues [Tom—Ongoing]
 - 8. Develop institution wide succession planning policy that ensures little turmoil when replacing staff
 - a. Obtain an example of succession planning document from Ohio History Connection [Tom—Sept 2017]
 - b. Develop written succession plan for staff [Christie and Tom—July 2018] to include:
 - i. Hiring replacements
 - ii. Creating time for retiring staff to meet with new staff
 - iii. Institutionalizing individual knowledge through oral histories and written manuals
 - 9. Continue to improve staff relations and communication
 - a. Create a formalized program by which staff can give workshops/lectures/programs for fellow staff members [Christie—Dec 2017]
 - b. Develop post-conference information sharing program with other staff [Christie—Oct 2017]
 - c. Continue to recognize staff accomplishments [Christie—Ongoing]
 - d. Continue staff appreciation program [Christie and Tom—Ongoing]
- E. **Development:** Increase and diversify the funding base of the Hayes Presidential Library & Museums to achieve an operating budget that strengthens its infrastructure and programming
1. Put together an aggressive fund raising plan that will increase the annual operating budget to \$2 million and grow the endowment to \$9 million
 - a. Free up Executive Director's time to be able to support annual and planned giving efforts [Christie—Jan 2018]
 - b. Increase annual appeal (Gateway to the Future) to consistently increase by 10% annually
 - i. Change appeal brochure to include check off interests of giving [Kathy—Sept 2017]
 - ii. Secure challenge gifts [Kathy – October 2018]
 - c. Develop a major donor initiative
 - i. Create naming opportunities for endowed positions and/or programs [Kathy and staff—Dec 2017]
 - ii. Develop a major donor booklet to include Gateway to the Future, Planned Giving, and Endowment [Kathy and Gil—Mar 2018]
 - iii. Identify and schedule meetings with major donors [Kathy—Apr 2018 and Ongoing]
 - iv. Using interests identified on the annual appeal brochure and other sources, create a personalized request for funding [Kathy and Christie—Apr 2018]

- d. Formalize Legacy Leaders program
 - i. Form an advisory group to help staff understand and grow the planned giving program [Kathy—Apr 2018]
 - a. Attend meetings and workshops to understand legal and financial issues associated with planned giving
 - ii. Create planned giving materials to give to donors [Kathy—Apr 2018]
 - a. Include an advanced giving aspect to a planned gift
 - iii. Lunch meeting with attorneys and advisors to show them what the Hayes is all about [Kathy—July 2018]
 - iv. Identify prospects [Kathy and Christie—Apr 2018]
 - v. Grow the numbers of Legacy Leaders [Kathy—Ongoing]
 - e. Formalize relations with the Hayes family
 - i. Create: Hayes Family Leadership “*Preserving a Legacy*” [Kathy—Oct 2017]
 - a. Visiting Hayes families across the U.S.
 - b. Plan for next Hayes family homecoming
 - f. Continue sponsorship program [Kathy—Ongoing]
 - i. Look at increasing sponsorships opportunities through curatorial/education and library departments
 - g. Create a Spiegel Grove Giving Program [Kathy and Marketing/Development Committee—Oct 2017]
 - i. Strategic signs asking for support
 - a. Signs of Squirrels asking for support of the trees and grounds
2. Increase earned revenue
 - a. Grow and retain the membership of the Hayes Presidential Library & Museums [Kathy—Ongoing]
 - i. Grow by 5% annually
 - ii. Reach out to neighborhood
 - b. Increase museum store income by \$8,000 by 2020 [Lisa—Dec 2020]
 - i. Increase online presence
 - a. Send out email blasts with special promotions
 - b. Evaluate effectiveness annually
 - c. Increase visitation revenue via marketing plans (See marketing section of strategic plan)
 3. Increase government investment
 - a. Create legislative members day, inviting them to come for an awareness gathering [Christie—Sept 2017]
 4. Develop a stewardship program to maintain strong relationships with people who give and are involved [Kathy—Aug 2017 and Ongoing]
 - a. Involve all staff and board

- b. Title: Summer Stewardship Program
- F. **Governance:** Ensure a diverse, active, and supportive governance structure that meets the needs of the Hayes Presidential Library & Museums
1. Strengthen governing structure
 - a. Create a Governance Committee consisting of Board members and providing quarterly Board reports [Jen Barrett and Christie, February 2018]
 - i. Annual review of bylaws and other operating policies [Governance Committee, November 2018]
 - ii. Handle conflicts of interests when they arise [Governance Committee, ongoing]
 - iii. Serve as nominating committee [Governance Committee, ongoing]
 - iv. Develop a survey to see how board members feel about board materials and effectiveness of board meetings [Governance Committee, February 2019]
 - v. Develop a survey to learn how board members feel they are performing [Governance Committee, February 2019]
 - b. Consider creating a Human Resources Committee tasked with providing reports at board meetings [Jen and Christie, February 2019]
 - i. Staff salary bench marking, benefits, and other issues
 - ii. Insurance matters, especially on annual basis
 - c. Revise Collections Committee to become Curatorial and Education Committee [Jen and Christie, February 2018]
 - i. Include board members
 - ii. Possibly including community people on committee
 - iii. Add Collections subcommittee
 - a. Accessioning and deaccessioning
 - b. Enforce the Collections Policy
 - d. Create a records retention policy [Christie, Nan, Merry and Tom, February 2019]
 - i. Make decisions about what, how, and when to retain institutional materials
 - ii. Conduct oral histories of collections and other veteran staff
 2. Ensure effective Board of Trustees [Jen and Christie, May 2018 and ongoing]
 - a. Strengthen board training program
 - b. Annual site and grounds walk for educating the board about the institution
 - c. Possible training on overall board member responsibilities
 - d. Have a social event at one board meeting each year
 3. Ensure strategic plan is accomplished [Jen and Christie, Ongoing]
 - a. Report on strategic planning at a board meeting each year
 4. Protect the assets of the Hayes Presidential Library & Museums [Christie and Executive Committee, December 2020]
 - a. Explore legal issues that might affect establishing a separate board for the Rutherford B. and Lucy Webb Hayes Foundation

- b. If appropriate create separate board for the foundation that has a purpose to financially support the Hayes Presidential Library & Museums
 - i. Create a structure that facilitates a relationship between the Hayes Presidential Library & Museums and the Foundation
- 5. Develop a plan for determining who can be buried in the Hayes plots at Oakwood Cemetery [Jen and Christie, August 2018]
- 6. Develop a policy for naming trees [Jen and Christie, August 2018]