



STRATEGIC PLAN

The National Society of The Colonial Dames of America in The Commonwealth of Massachusetts

May 2016 - April 2021

Mission Statement: The NSCDA-MA actively promotes our national heritage through historic preservation, patriotic service and educational projects.

Objects of the Society: The objects of this Society shall be to collect and preserve manuscripts, traditions, relics, and mementos of bygone days; to preserve and restore buildings connected with the early history of our country; to educate our fellow citizens and ourselves in our country's history and thus diffuse healthful and intelligent information concerning the past; to create a popular interest in our Colonial history; to stimulate a spirit of true patriotism and a genuine love of country; and, to impress upon the young the sacred obligation of honoring the memory of those heroic ancestors whose ability, valor, sufferings, and achievements are beyond all praise.

Proposed Vision: We envision a vibrant NSCDA-MA committed to:

- Historic properties and collections that fully engage a large and diverse audience and encompass all aspects of our mission
- An involved membership which executes our mission through a variety of activities based on interest and ability
- A growing membership and a clear membership process
- A leadership prepared to build commitment and translate strategy into effective action
- A sound financial position with a strong development plan to support our mission and vision

Proposed Organizational Profile: We are:

- Over 425 members governed by Officers and a Board which meets 10 times a year
- Owners of a 19th century town house containing our headquarters, museum room, and costume collection
- Owners of an 18th century farm house with 2 historic barns and two other buildings on 53 acres in Swansea
- Owners of the decorative arts collection, stewards of the interior, and managers of a 17th - 19th century mansion in Quincy in partnership with the MA Department of Conservation and Recreation (DCR)
- Collectors and preservers of a 17th - 21st century costume collection of over 7000 pieces
- Participants in national initiatives such as the Congressional Essay Contest, Sampler Survey, American Indian Nurse Scholarships, and Oral Histories
- Committee members who support the Society's activities
- Collaborators with other local organizations on specific projects
- Volunteers with an annual operating budget of approximately \$350,000 and overseers of a professionally managed endowment of approximately \$2 million

Planning Process

The NSCDA-MA first developed a five-year Strategic Plan in January 2010 as a result of two day-long workshops. Five needs were identified as Society-wide priorities:

1. Increase Membership
2. Engage Members
3. Promote the Society internally and externally
4. Collaborate both internally and externally
5. Use technology more effectively

Our re-invigorated efforts to recruit new members only managed to keep us even with deaths and resignations; the need is still there. We inaugurated a book club and area gatherings to make it easier for members to socialize outside of our Boston headquarters. Our capital campaign *Pride in Preservation* engaged over half our membership in financial support for the Society, nearly doubled our endowment, established funds for conservation and education, and underwrote much necessary preservation work at all three properties. We established the Prescott Award for Excellence in Historical Writing to promote and reward scholarly interest in Colonial history. We collaborated with two local churches and Harvard University on a series of four lecture/panel presentations on the impact that religious beliefs of our early Puritans have had on our history and heritage. We have established a Web page for public and private use and the Young Dames participate in national Facebook pages. We use telecommunication software for meetings and much sharing of information.

Another day-long workshop was held to create the next five-year strategic plan in late January 2016. Again Dame Diane Schmalansee, a professional consultant in this area, facilitated the discussions. At large and small group discussions we identified four areas in which to set strategic goals for 2016 - 2021:

1. Cultivate Members
2. Improve our Stewardship of Houses and Collections
3. Enrich Mission Activities
4. Enhance Internal Organizational Capabilities

The committees and persons responsible for implementation are noted on the right of each goal. Budget implications need to be determined separately.

Goals and Objectives

1. Cultivate Members

Membership Goals	Objectives	Specific Target	Responsibility
Change New Members Committee to full Membership Committee			President, Board
Increase number of candidates, especially young members	Actively look for new potential members in diverse groups	Find at least 15 new candidates each year Promote new Youth memberships	Board, membership
Actively integrate new members into Society	Track participation of candidates and new members over first 5 years	Encourage program attendance	Membership Committee
	Extend personal invitations to encourage participation		Membership Committee, sponsors
	Recruit 2-3 new members to committees to encourage rotation	Encourage age and skill distribution	Committee chairs
Make membership rewarding	Facilitate carpooling to events	Encourage fellowship and attendance	Membership Committee
	Offer alternative events such as brown bag lunch programs	Contain costs and add variety	Program Committee
	Send out interest sheets and member surveys	Use for programming and committee assignments	Membership Committee
Collaborate with similar lineage organizations	Cultivate ties with Society of Colonial Wars		Membership Committee
	Co-host events with other organizations	Mayflower, D.A.R.	Program Committee

2. Improve our Stewardship of Houses and Collections

General Goals:

Goals	Objectives	Specific Targets	Responsibility
Develop a 5-year time-line budget based on Needs Assessment	Prioritize projects		House Committees Costume Committee
	Work with Development Committee on grant possibilities		House Committees Costume Committee
	Strengthen outreach tools	New brochures, public listings, open houses	House Committees Costume Committee
	Update Needs Assessment Study every 2 years		House Committees Costume Committee
Prescott House Goals			
Generate better publicity to increase visitation			House Committee Docent Committee
Address projects based on Needs Assessment			House Committee
Develop Records Policies for Archives			Archives Committee

Martin House Farm Goals			
Develop long-term plan for property			House Committee and Board
Continue to support school program			House Committee

Costume Collection Goals			
Develop policies for acquisition, maintenance and de-accession			Costume Committee
Improve publicity for collection	Loan to other venues		Costume Committee
Collaborate with Program Committee for related topics			Costume Committee Program Committee
Identify and photograph costumes with irreparable damage			Costume Committee
Quincy Homestead Goals			
Cultivate strong ties with public partners and neighbors	Work with city, state, National Park agencies Work with new housing developments for local volunteers		Quincy House Committee
Develop new educational interpretation of Homestead	Re-create original 17c. bedroom Design Museum Room Pursue archaeological exploration		Quincy House Committee
Develop new educational interpretation of Homestead			Quincy House Committee
Start process for next Memorandum of Understanding			Quincy House Committee

3. Enrich Mission Activities

Goals	Objectives	Specific Target	Responsibility
Historical Activities and Research Goals			
Focus on 125th Anniversary of Society in 2018			Historical Activities Committee, Anniversary Chair
Create new history of Society Plan celebratory events			Historical Activities Committee
Develop symposia on Colonial history through local collaborations			
Continue to support national projects	Collect sampler and portrait surveys Convert oral histories to CD from tape		Historical Activities Committee
Patriotic Services Goals			
Support educational outreach for youth	Participate in National History Day Participate in Congressional Essay contest		Patriotic Service Committee
Participate in Naturalization ceremonies in MA			Patriotic Service Committee
Contact MA tribes for American Indian Nurse Scholarship			Patriotic Service Committee
Increase support for military	Include SCW veterans in our reception Connect with ROTC and homeless shelters		Patriotic Service Committee

4. Enhance Internal Organizational Capabilities

Goals	Objectives	Specific Targets	Responsibility
Develop and implement fund raising strategies	Create list of grant givers, cultivate them Initiate Annual Appeal Sell scarf and other items for 125th Anniversary Create fund raising plan for Anniversary	Identify specific interests among members for funding special projects	Development Committee House Committees
Define position for part-time staff member	Bring needed communications skills to Society	Web and email support Grant writing Supervision for interns Maintenance of members' skills bank and tracking date	President, Board
	Bring needed marketing skills to Society	Publicity support for press and other media, local hotels and other institutions	President, Board
Secure funding for part-time staff member	Secure grant or special funding or adjust budget		Development Committee Finance Committee
Develop leadership procedures for committees and officers	Expand Nominating Committee to include governance issues	Help with appointed positions	President, Nominating Committee, Long Range Planning Committee
	Institute Board Development practices	Use National Board, NEMA and other Associations' resources	President, Board

