

**The Peterborough Historical Society &**  
**Hutchison House Museum**  
**Strategic Plan**  
**2020-2024**  
**Final Version 7.0**  
**Presented to and Approved by the**  
**Peterborough Historical Society Board**  
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**Framework**

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## Purpose

Peterborough Historical Society needs to update its strategic plan to maintain and enhance its position as a proactive educational, cultural and heritage society.

## Scope

IS	IS NOT
Strategic and tactical plans	Operational plans
Realistic	
Aspirational	
Measurable	
Multi year	
Inclusive (Peterborough Historical Society and Hutchison House) and integrated	Peterborough Historical Society and Hutchison House with separate plans
Research and Development	
Advocacy	
Alignment with municipal, provincial, federal directions	
Audience is Peterborough Historical Society members, volunteers and staff and the broader cultural and heritage community, including prospective donors	

## **Background:**

### **Framework of Peterborough Historical Society and Hutchison House**

The Peterborough Historical Society is an incorporated not-for-profit organization with registered charitable status that promotes and enhances, through numerous means, the City and County of Peterborough community's history. It owns and operates Hutchison House Museum.

Peterborough Historical Society and Hutchison House are funded through annual membership fees, government grants, donations and endowments.

The Hutchison House Management Committee, on behalf of the Peterborough Historical Society, manages and maintains the day to day operations of Hutchison House. Hutchison House Management Committee is a committee established by the Peterborough Historical Society Board and maintains its own financial records, including an operating bank account.

Many activities and programs are delivered throughout the year, some of which include; Hogmanay, PA Day Workshops, Monthly Lecture Series, Heritage Luncheons, Scottish Teas, Christmas Market, and Children's Christmas, to name a few.

### **Background: The results of previous strategic plans**

- An accessibility project to meet Accessibility for Ontarians with Disabilities Act requirements
- Upgrades to structural, electrical and plumbing infrastructure
- Renovated kitchen and accessible washroom facilities
- Up-graded reference library space
- New cedar shake roof, replaced front porch, exterior painting, improvements to the gardens, as well as construction of a new wooden garden shed that is in keeping architecturally with the museum building
- An updated web-site was launched
- An improved monthly bulletin format was introduced
- A new fundraising opportunity was introduced, with the participation of volunteers supporting a local Bingo operation
- Co-sponsored the Public Health 130<sup>th</sup> anniversary workshop and celebration

## **Vision Statement**

The Peterborough Historical Society and Hutchison House will be widely recognized as a thriving centre for public education and research, and a respected voice for communicating the importance of our region's past, enriching and transforming lives through unparalleled access to history throughout the City of Peterborough and Peterborough County.

## **Mission Statements/Mandates**

### **Peterborough Historical Society and Hutchison House Museum**

The governing body (Peterborough Historical Society):

To foster public appreciation of the people, places and events that have contributed to the history of the City and County of Peterborough

To engage the community in the preservation, conservation, education and both critical assessment and celebration of our culture and heritage.

The operating arm (Hutchison House):

To generate public awareness of the historical value of Hutchison House Museum and to facilitate public engagement with Peterborough's history through educational programs, fundraising, continued use of Hutchison House itself, and other like activities.

## **Community Consultative Process**

See Appendix '3' for a detailed description of the consultative process in place for the development of this plan as well as its ongoing review

## Strategic Priorities: Setting the Direction

Strategic Priority	Description
An optimized <b>Governance</b> model	An organization with a governance model that is practical, transparent and accountable
Relevant and comprehensive <b>Public Education Programs, and Collection Management</b> including extended outreach and communication	<p>Peterborough Historical Society and Hutchison House have very robust programs in place today. There is a need to broaden outreach techniques including social media to increase public awareness of opportunities to learn, individually and collectively.</p> <p>There is a need to create more of a focus on indigenous engagement and reconciliation.</p> <p>Hutchison House is a museum whose enhanced collections, or components, of collections, is essential and needs to be pursued without the worry of financing either. Collections management needs to be prioritized and supported by a comprehensive plan and funding commitments.</p> <p>There is a need to address diversity within the community more directly.</p>
<b>Financial Sustainability</b> , including active fund development and strong partnerships	Peterborough Historical Society and Hutchison House need a clear and auditable financial strategy, including a fund development plan that will support all other strategic priorities. Need to encourage stronger community engagement and forge strategic partnerships/sponsorships
A comprehensive <b>Facilities Management Strategy</b>	Hutchison House itself and the grounds require a plan for annual maintenance and one-time capital projects
Through capacity-building, increased memberships and a <b>Strengthened Volunteer Base</b>	A stable volunteer base and membership roster, is essential to the ongoing activities and operations of the Peterborough Historical Society and Hutchison House

## Strategic Goals: Setting the Direction

For each of these strategic priorities, the plan identifies specific goals. A subsequent implementation plan will establish realistic timing to achieve success. The following is a draft list of these specific goals

Strategic Priority	Strategic Goals
An <b>Optimized Governance</b> model	A comprehensive organizational analysis that addresses the relationship between Peterborough Historical Society and Hutchison House, including linkages to the City of Peterborough and a realistic and sound organizational model
	A comprehensive review of the Peterborough Historical Society constitution and charitable objectives to create a new plan for future activities
	A set of business practices, including policies, which will establish a consistent and documented approach to matters such as records and archival management, financial reporting, fund development, communication policies and procedures
	A revised organization chart
	An effective succession planning plan
Relevant and comprehensive public <b>Educational Programs,</b> and <b>Collection Management</b> including extended outreach and communication	A comprehensive review of all programs (themes, types, scope, revenue and expenses, resource needs). A revised collections management policy and operating framework that defines the boundaries of any acquisitions to enhance existing and future programs, and their costs
	Prioritization of both existing and potential programs
	A communications strategy (social media, publications)
	A toolkit of educational resources

<b>Financial Sustainability</b> development, including active fund development, and strong partnerships	A review of all financial practices, and related documentation
	A fund development strategy
	A long term plan to maximize revenue generation, which should include sponsorships and innovative cash flow opportunities
A comprehensive <b>Facilities Management</b> strategy	A facilities master plan indicating ongoing maintenance requirements and costs, deferred capital and operating project costs
Through capacity-building, increased memberships and a <b>Strengthened Volunteer Base</b>	A robust volunteer base that responds to and supports, programs, events and projects endorsed by the Peterborough Historical Society Board
	A database of volunteers tracking time spent by activity
	A membership base that reflects the demographics of the region and is inclusive and committed



## Key Performance Indicators – Measures of Success

KPI's are a required set of criteria to measure the successful implementation of each of the above goals, and the success of the plan as a whole. It is mandatory that they should reflect both qualitative and quantitative measurements.

Strategic Priority	Key Performance Indicators
An <b>Optimized Governance</b> model	<ul style="list-style-type: none"> <li>• Create and implement a cohesive governance model including a streamlined functional organization chart during Q1 2020</li> <li>• Address any discrepancies in the governance model and organization structure in subsequent years</li> </ul>
Relevant and comprehensive public <b>Educational Programs, and Collection Management</b> including extended outreach and communication	<ul style="list-style-type: none"> <li>• Review and modernize educational program offerings in 2020-2021</li> <li>• Conduct 4 outreach programs in each of the first 3 years of the strategic plan</li> <li>• Analyze, modify and implement new communication tools and programs during 2021/2022</li> </ul>
<b>Financial Sustainability</b> development, including active fund development, and strong partnerships	<ul style="list-style-type: none"> <li>• Develop and launch 1 major fundraiser in 2020/2021 and one additional fundraiser in 2023/2024</li> <li>• Secure 3-4 sponsors in 2020, 5 sponsors in 2021/2022</li> <li>• Create 2 working partnerships during 2020 and 3 additional partnerships in each of the remaining years</li> <li>• Analyze existing revenue generating streams and modify/implement new ones in order to maximize revenue</li> </ul>
A comprehensive <b>Facilities Management</b> strategy	<ul style="list-style-type: none"> <li>• Create a fully defined 2-3 year plan for maintenance and expenditures for Hutchison House</li> <li>• Maintain the Hutchison House premises within the approved annual budget (+/- 10%)</li> </ul>
Through capacity-building, increased memberships and a <b>Strengthened Volunteer Base</b>	<ul style="list-style-type: none"> <li>• Increase the volunteer base by 10% year over year</li> <li>• Increase memberships by 10% years 1-5</li> </ul>

## **The Implementation Plan**

- The implementation plan is presently in 'draft' form and is included in a separate document
- The 5 year implementation plan will address the period in detail for 2020-2022.
- The remaining 2 years will be assessed on an annual basis after that
- Resources (people) have been assigned to the critical activities contained in the plan
- Financial requirements have not been specifically identified as the majority of the financial spend is associated with staffing
- The majority of the activities, events, communications, and other like functions are all provided with volunteer resources, at no cost to Peterborough Historical Society
- Other financial requirements, including the on-going maintenance of Hutchison House are all budgeted on an annual basis as part of the financial planning process

## **Appendix 1**

### **Peterborough Historical Society – Current Mission Statement**

The Peterborough Historical Society is a champion of local history and the preservation of local heritage resources through historical research, informed advocacy and support for public education programs at Hutchison House Museum and within the community.

### **Mandate**

- Supports the maintenance and operation of Hutchison House Museum, ensuring that the designated heritage features of the structure are preserved
- Supports activities at Hutchison House Museum by encouraging its members to serve as volunteers
- Sponsors high quality public programs that promote awareness and appreciation of local history and celebrate achievements in local heritage preservation
- Advocates on behalf of heritage issues in the community at all levels of government
- Collaborates with other community organizations and heritage groups to promote the value of heritage resources to the local economy and quality of life in the City of Peterborough and the County of Peterborough
- Produces diverse, well-researched publications of local history
- Fundraisers to support the organizational mandate

## Appendix 2

### **Hutchison House Museum – Current Mission Statement**

Hutchison House Museum is a dynamic, interactive heritage site that offers visitors meaningful living history experiences. It operates with a strong customer-service focus that builds on its reputation as a unique cultural attraction in Peterborough. Through its collection, research, exhibitions, and programming, Hutchison House Museum creates opportunities for connections and participation.

### **Mandate**

- Operates as a history museum, dedicated to preserving and interpreting the social history of Peterborough
- Acquires and preserves artifacts that help tell the story of Hutchison House, from its first residents, Dr. Hutchison and his young family, through 3 generations of the Harvey-Connal family
- Acquires, preserves and presents artifacts and documentary materials relating to medical practices in Upper Canada in the early 19<sup>th</sup> century
- Interprets the development of engineering in Upper Canada and Ontario through Sandford Fleming's connection to the house
- Delivers educational programs for schools in keeping with the museum's mandate and the Ontario Curriculum
- Responds to requests from the community for educational programs and special activities including offering outreach programming
- The museum offers research opportunities and maintains a reference library, including books on topics such as local history, health and medical history, Canadian history, social practices, antique furnishings, historical cooking, gardening, etc.
- Operates a bookshop dedicated to the promotion of historical topics including local history, township histories, and local authors (past & present)
- Collaborates with other organizations to promote public appreciation of the importance of heritage preservation in the community

## Appendix 3

### **Recap of Strategic Planning Committee Process – High Level**

- Initial meetings were held with the Strategic Planning committee members to establish who within the community should be contacted to act as consults
- Contact was made with the selected community members
- Interviews were conducted with a selected number of other museums across the province to discuss their approach to strategic planning, operational effectiveness, fund raising and community involvement, to name a few matters
- Consultations were held with members and volunteers
- Draft Strategic Plan was developed by the planning committee
- Draft Strategic Plan was shared with the Board and Hutchison House Management Committee
- Draft Strategic Plan was shared with the identified community members for their input and guidance
- Feedback was received and incorporated into the Strategic Plan
- The revised plan was shared with the Board and Hutchison House Management Committee for their input
- Final amendments were made to the plan
- Final plan was submitted to the board for their approval

### **Strategic Planning Committee Members**

- Dale Standen – Peterborough Historical Society President
- Bob Taylor-Vaisey – Peterborough Historical Society Vice-President
- Paul Lumsden – Peterborough Historical Society Treasurer and Hutchison House Property Manager
- Gale Fewings – Hutchison House Curator/Administrator
- Wayne Godward – Peterborough Historical Society Board and Trustee Board Member

### **Community Input and Consultation Contacts**

In planning its future direction, the Peterborough Historical Society emphasizes community interaction and resulting collaborative initiatives. To ensure that the Peterborough Historical Society strategic plan will satisfy both priorities, the Planning Committee has corresponded with over 20 community individuals for input into the strategic plan and insights into the implementation plan.

## **Appendix 4**

### **Recap of Peterborough Historical Society and Hutchison House**

#### **Strengths, Weaknesses, Opportunities and Threats**

##### **Strengths**

- Ownership of Hutchison House Museum
- Hutchison House is a designated property under the Ontario Heritage Association
- Hutchison House is a Municipal Capital facility
- Hutchison House is recognized by the Peterborough Architectural Conservation Advisory Committee
- Peterborough Historical Society acts as stewards of Hutchison House
- Dedicated core team of members and volunteers
- Dedicated board
- Well respected within the community
- Many interesting programs for community members to participate in
- Public education and programming is at the heart of Peterborough Historical Society and Hutchison House

##### **Weaknesses**

- Declining memberships and number of volunteers
- Limited funding, too much reliance on grants, rather than on earned revenue
- Limited rotating exhibit and activity space within Hutchison House
- Limited public profile within the community
- Role clarity between Peterborough Historical Society and Hutchison House

##### **Opportunities**

- Increased memberships and volunteer base
- Rationalization of Peterborough Historical Society supported activities within the community
- Increased Hutchison House visitations
- Expand scope of Hutchison House programming and activities
- Capitalize on Hutchison House as an asset to the Society
- Promotion of Peterborough Historical Society within the community and county
- Revitalization of cultural and heritage network
- Pursuance of productive and collegial working relationships with other local heritage organizations for the collective benefit of engaging the community and facilitating research opportunities

## **Appendix 4 (Continued)**

### **Recap of Peterborough Historical Society and Hutchison House**

#### **Strengths, Weaknesses, Opportunities and Threats**

##### **Threats**

- Lack of coordinated regional network of 'like' groups including (but not limited to: Peterborough Museum and Archives, Lang Pioneer Village, City of Peterborough Heritage Preservation Office, Trent University Archives and Special Collections, Canoe Museum, Trent Valley Archives, area historical societies
- Decline and general awareness of heritage across the city/county/province
- Continued decline in memberships and volunteers
- Dependence on government grant funding (municipal, provincial, federal)
- Lack of revenue generating activities to continue programs and maintain Hutchison House
- Inability to keep up with the physical deterioration of Hutchison House
- Lack of data to support the economic value of the Peterborough Historical Society and Hutchison House to the City of Peterborough