STRATEGIC PLAN 2020-22 + 2023 SUMMARY

On February 8, 2020, a meeting of the Board of Trustees was convened to assess the Preservation Long Island’s (PLI’s) status relative to the two past Strategic Plans: 2015-2017 and 2017-2019. Working with a facilitator provided by the New York Council of Nonprofits, the board reviewed the prior Plan outcomes and convened to develop a new three-year Plan that further addressed key strategic issues (governance, revenue, and outreach) and introduced more robust and detailed goals relative to collections, education, and communications. The organization’s mission, vision, and core values were reviewed and modified slightly for greater clarity. The scope of the Strategic Plan was adopted on May 15, 2020, targeting full implementation by May 2023. The plan was subsequently reviewed by the executive committee on May 15, 2023. With certain Plan “action tasks” still underway and a new president to be elected in June, the committee decided to extend the current Plan for another year to allow a new president to structure the facilitated retreat.

Strategic Plan Goals

The 2020-22 Plan identified six strategic issues: Governance, Revenue Generation, Collections Management, Programs, Marketing and Operations. Under each issue were outlined several actions with various tasks for implementation to reach the strategic goals within the Plan’s three-year period. Goals include better board and public engagement, strengthened fundraising, increased visibility, and achieving institutional sustainability. The primary Collections goals are derived from the recommendations outlined in a 2019 Preservation Plan prepared by DHPSNY that include strengthening collections management, security, and accessibility by improving intellectual control over databases and objects on site and in storage; digitizing collections for public access, research and exhibitions; and improved and improving environmental controls at all facilities.

Strategic Plan and Collections

Up until 2015, PLI produced long-range plans at five-year intervals. It then adapted a shorter plan structure after a new Executive Director was hired. The purpose of these short-duration Plans was to concentrate on three institutional goals that were considered critical to PLI’s success under new leadership. Plan implementation saw the successful adoption of new governance documents, brand messaging through a name change, increased professional staff, and efforts to improve poor fundraising outcomes. Recent outcomes include the hiring of a development professional in 2023.

Collections Management was consistently represented as a category of strategic goals in these documents, and were prioritized in the current three+one-year Plan. Collections-oriented goals since the adoption of the 2020-22 Plan build upon past plans and tie together two primary objectives – to gain greater intellectual control over the collections at-large and to address critical
storage and preservation needs at five sites. To date, collection-related achievements include: collections-focused staff hires, continued conservation by priority, creation of a publicly accessible collections digital database, new collection forms and updated collection policies, an archive needs assessment and preservation survey, a historic housekeeping handbook, a risk assessments for collections and historic properties, and an emergency response plan. Currently in progress is a full baseline object collections inventory at all PLI facilities (funded through a 2022 IMLS Inspire! Grant) that will inform how PLI plans, prioritizes, and implements all future collections management initiatives towards improved preservation and public access, both actual and virtual.

A proposed Digital Collections Management project links to the Strategic Plan as it helps to fulfill the following Collection Management Actions and Objectives:

Action: Implement preservation plan for collections with Objectives:
- Improve collections inventory and cataloguing
- Develop plan for collections staffing support
- Implement archives assessment [and preservation survey] recommendations.

Action: Develop proper organization and storage at facilities to enhance preservation
Action: Increase access to digital database and collections.

Foremost, the project will improve how PLI implements and funds a foundational high priority strategic objective: the improvement of collections cataloguing and digitization procedures that are fundamental to achieving all other collections management and access goals. Through this planning project, the organization will be able to determine the best Collections Management System (CMS) and cataloguing procedures to serve PLI’s specific collections management and access needs and goals: to resolve the currently cumbersome nature of publishing collection details to the organization’s website; the difficulty of using the current CMS at distributed sites to support on-site educators; and the lack of completeness and trustworthiness of the metadata describing the collection.

In addition, the project fulfills other programmatic strategic goals to increase engagement with the public through:
Action: Increased education programming capacity
Action: Interpretation of historic houses and collections
Action: Educationally rich virtual access to properties