Middletown Springs Historical Society

Strategic Plan
2021 – 2025

Approved by the Board of Trustees: December 3, 2020

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INTRODUCTION

The Middletown Springs Historical Society (MSHS) was founded in 1969 to create the Mineral Springs Park. Listed on the National Register of Historic Places in 1985, and maintained by the Society, the park recreates and interprets the history and legends of the site where the famous Middletown Springs still flow under a replica Victorian pavilion, as part of the Montvert Hotel resort (1868 -1905).

In 1970, MSHS saved the Community House on the town green, aka, the Adams House, from destruction, and successfully restored the National Register-listed building for community use, including hosting the Middletown Springs Public Library until 1979 and, currently, the Middletown Springs Town Office. Early major improvements for code compliance included new wiring, fire alarm system and access security systems, along with new plumbing, roofing, insulation, and drywall. Projects for improved handicap access, code compliant use of the second floor, higher museum standards, and energy efficiency followed in succession.

Now known as the Middletown Springs Historical Society Building, the facility includes museum exhibit areas, meeting rooms, dining room, kitchen, restrooms, and rental office space on the ground floor, and an auditorium/exhibit space and museum storage rooms on the second floor.

The Society was incorporated as a 501(c)(3) non-profit in 1970 and its bylaws have been amended several times, most recently in 2018. The Board of Trustees now includes as many as eleven members, one of whom is a Founding Trustee with lifetime tenure, and the others with two-year terms.

The MSHS paid membership of 195 includes some 43 “Life Memberships” from early years. The “Life Member” option was discontinued in 2006 in favor of new annual membership categories of “Sustaining Member” at $100 and “Contributing Member” at $25 and “Business Member” at $50. “Family” annual memberships remain at $15 and “Individual” at $10. Complimentary Memberships are extended to other historical societies and history institutions, as well as artifact donors and significant business donors.

In 2009, MSHS did a self-guided strategic planning process, based on models from other organizations, resulting in the adoption of a Mission Statement and a Vision Statement, and the production of a new MSHS Museum sign, erected in front of the MSHS Building.

MSHS maintains membership in the Vermont Historical Society and the New England Museum Association.

ORGANIZATIONAL MILESTONES

From MSHS Newsletter article September 2019, www.middletownspringshistoricalsociety.org

Middletown Springs Historical Society began with a donation that preserved a local landmark and the history that surrounds it. The Society developed from that gift into a vibrant organization, proud of it many accomplishments over its first half century. Here is a time-line of some of these achievements:

1970 - Kay Avery and Theron Krouse gave a parcel of land including the historic Middletown Springs to the newly created Middletown Springs Historical Society.

1975 - A matching grant of $600 was awarded by Vermont Historical Society toward the reprinting and publication of the 1867 *History of Middletown* by Barnes Frisbie. The new edition of the "Frisbie" with maps, photographs and an index, was published in 1975.

1977 - A donation of $1,000 was matched by $1,270 in small donations to create a new kitchen in the Historical Society building.

1977 - Judge Earle Hubbard donated funds to purchase the tables and folding metal chairs which are still in use, as a memorial to his wife, Jesse Hoadley Hubbard.

1977 - The sixth Mini Mart sale brought in over $5,000, eclipsing records for the previous five annual summer sales of antiques, clothing, jewelry, and household items. Proceeds were used to put in a heating system for the dining room and the new kitchen.

1979 - A gift of $5,000 was given in honor of Herbert Davison, long-time trustee and president, by a former student, William P. Boswell.

1979 - A mineral collection was bequeathed to the Society by Middletown Springs native, Henry F. Gray, who taught at Tufts University, Massachusetts Institute of Technology, and Wentworth Institute.

1980 - The Town of Middletown Springs began renting Town Office space from the Society in July, 1980 for Town Clerk, Florence Coburn in the newly restored ground floor.

1989 - Dr. Irene Lobdell left a bequest of $10,000 to the Society in memory of her parents.

1989 - Vt. Division for Historic Preservation awarded a Cultural Facilities Grant of $2,300, to be matched 2 to 1. $4,600 was raised, including $2,952 worth of volunteer labor, to restore the second-floor auditorium and to install a fire detection and security system for the entire building. Project cost was $8,789.

1990 -1991 - The Society led a $6,000 project for repair work to monuments in the Old Cemetery. The Town contributed $3,000 of this, which was matched by donations of $2,000 from the Society and $1,000 from other town organizations. The society received an Annual Local Society Achievement Award from the League of Local Historical Societies (LLHS) for leadership in the Old Cemetery Restoration Project.

1991 - The Elisha Leffingwell tin shop was donated by Alice Haynes Hoisington and other members of her family. Originally an addition to the Leffingwell/Hoisington house on East St., it was moved cross-lots to a new foundation in the Mineral Springs Park by Bud Krouse and a crew of volunteers.

1991 - An A.W. Gray thresher was given by Ellen McLaughlin Kelley, formerly a resident of South St., and a buggy was given by Albert McLaughlin of East Poultney.

1992 - Anne Moore of Greenfield, Mass., donated a stair lift,that was transported from Winhall and installed in the Historical Society Building by Dan Querrey and his father, Ed Querrey.

1992 - Carris Reels donated materials and employees' labor fabricating and installing new scrollwork for restoration of the 1971 spring house.

1993 - Doyle Lane donated an A.W. Gray horse-powered drag saw.

1993 - Vt. Museum & Gallery Alliance (VMGA) awarded a matching grant of $250 for a Collections Care Survey by consultant Kim Zea.

1994 - Kay Avery donated $1,000 for updating the town history.

1994 - Two $200 matching grants from the federally funded Institute for Museum Services (IMS, now IMLS) helped to hire consultant Michele Pagan to train volunteers for conservation work on the collection.

1994 - The IMS awarded a $3,200 Technical Assistance Grant (TAG) for collections care materials, temperature and humidity monitoring equipment, improved displays, and training led by Michele Pagan.

1996 - Mr. & Mrs. W.D. Knaus of Andover, Mass. donated an oil portrait of Leonidas Gray.

1996 – 1998 - A "Learn and Serve America Grant" from the Vt. Commission on National and Community Service funded the Montvert Project, a two-year archaeology and history research project for local elementary and high school students, led by archaeologist Sheila Charles and educators Pam Lewis and Juanita Clay, including a two week long day camp. Additional support came from the Vermont Archaeological Society and the Vt. Division for Historic Preservation.

1996-1998 - The Society's 21st Century Fund raised over $30,000 in donations and grants for Town Office renovation and expansion and for Americans with Disabilities Act improvements, including a handicapped accessible rest room and ramp. Grants included a Vt. Cultural Facilities Grant of $4000, $14,000 from Preservation Trust of Vermont and $1000 from Vermont National Bank. In addition, The Town loaned $12,000 to the project (re-paid in rent reductions over a 10-year period). Donations from MSHS members totaled more than $8,000. The balance of the $43,000 project cost came from member donations.

1998 - A $10,000 gift from Hazel Grover brought the 21st Century Fund over its goal of $50,000. Ms. Grover's gift was dedicated to collections care and for oral history research. The Board of Trustees responded by creating a Collections Management Committee and an Oral History and Research Committee.

1998 – Grants from the National Endowment for the Arts (NEA) and VMGA funded a collections care workshop "Dressed for Success" for 22 professional and volunteer curators and museum technicians by conservators Gwen Spicer and M.J. Davis, held at the Historical Society in conjunction with the exhibit, "Shaping the Victorian Woman", featuring costume from the museum collection.

1999 - Grants from the Lake Champlain Basin Program, using funds from the U.S. Environmental Protection Agency (EPA) and the National Park Service, and the Hayes Foundation, as well as donations from Society members and area businesses, extended the Montvert Project archaeological camp for another year. The LLHS gave an Award of Merit for the Montvert Project in the category "Collecting, Interpretation and Display".

1999 - The Society requested a Roadside Historic Site Marker honoring A.W. Gray from the Vt. Division for Historic Preservation. The marker was installed on South St. in a July ceremony featuring state & local officials, and Gray family descendants. A performance of an award-winning Vermont History Day skit by three Poultney H. S. students was followed by a walking tour of the Montvert and Gray family sites.

2000 - Descendants of the Blakely and Grover families, descendants of the Henry Grays, the Barretts and the Barkers of Middletown and Tinmouth, donated many family items of furniture, costume & textile, paper, photography, agricultural & domestic tools, and ephemera spanning two and a half centuries. A grant from VMGA provided the Society with a museum intern, Jillian Adams, for eight weeks of crucial assistance accessioning and conserving the clothing and textiles of the Grover-Blakely donation.

2001 - A $1,000 grant from VMGA helped to fund the plans by designer Syver Rogstad of the new Museum Storage Room, including specifications for shelving, racks and cabinets.

2002 - A Black Forest clock that had belonged to Eugene Gray, son of Henry Gray, was donated to the Society by Vera Blakely and her daughter, Alice Blakely Marsh in memory of Robert Blakely.

2002 - A Preservation Assistance Grant from the National Endowment for the Humanities (NEH) of $4,870 was awarded for custom shelving and equipment for the new Museum Storage Room. Additional metal shelving was donated by the Rutland Free Library.

2003 - A $2,500 grant from the Windham Foundation was awarded for the Museum Storage Room project.
With the $4,870 NEH grant previously given, plus $2,000 in donations to the first Annual Fund campaign in 2002, and almost $3,000 from the members' donations, work began on the $12,000 project.

2004 - A $5,000 Preservation Assistance Grant from the NEH funded workshops to train volunteers to conserve and re-house the artifacts to be stored in the newly created Museum Storage Room; and to fund digital equipment and software to monitor and record temperature and humidity in storage and display areas. The five workshops were held in April and May 2005.
2004 - Slate for re-roofing the porte-cochère of the Historical Society Building was donated by an anonymous local Society member.

2006 - Isabelle Guthrie of Argyle, N.Y. donated an A. W. Gray treadmill used on her family farm.

2006 - Kay Avery, a founding Trustee who died in 2005, left a bequest of $15,000 "for the repair and maintenance of the Mineral Springs Park . . . and structures and fixtures thereupon".

2012 - A $5000 grant from the Vermont Community Foundation was used to repair damage to the Mineral Springs Park from Tropical Storm Irene in 2011. The spring house was repaired and repainted, drainage pipes restored and the bank of the North Brook near the footbridge was protected with riprap.

2012 - Children's book author Duncan Ball donated over 100 glass Dana Carpenter plate negatives that he bought in a Vermont antiques store in the 1970s.

2012 - The Society helped the Town match a grant from Preservation Trust of Vermont to study the historic characteristics of the buildings, past and present, around the town green and their possible influence on the design of the proposed Town Office, planned for a site on the Southwest corner opposite the green.

2013 - A collection of over 200 early 20th C. glass and film negatives from photographer and store keeper Kirby Kelley (1891-1967) was donated by his great-granddaughter Kristal Haynes Hier and her husband, Justin Hier.

2013- Grants and rewards totaling $3,500 from Efficiency Vermont (for improved insulation & air tightness, and the installation of a "mini-split" heat pump for heating and cooling the Town Office) reduced the cost of an energy efficiency project in the Historical Society building to $7,000, which was recouped in four years of reduced heating costs.

2013 - David Wright was given a Lifetime Achievement Award at the Annual Meeting of the Vt. League of Local Historical Societies.

2014 - The Middletown Springs Timeline 1761-1971, created by Jon Mathewson for 10 successive Vt. History Expo exhibits, received an Award of Merit in the category "Exhibitions and Public Programs" from the Vt. League of Local Historical Societies.

2017- The Society published *Middletown Springs Historic District,* a 200-page collection of descriptions and photographs of village buildings and places, listed on the National Register of Historic Places in 1985.

2018-2019 - The book *Middletown Springs Historic District* was given an award of Merit for Publications at the Annual Meeting of the Vt. League of Local Historical Societies. The book was favorably reviewed by Robert McCullough, professor in the UVM *Graduate Program in Historic Preservation*, in the Winter-Spring 2019 edition of *Vermont History*.

USING, UPDATING AND REFRESHING THE PLAN

The Strategic Plan forms part of a package of planning and reporting activities. The Plan provides a set of broad goals, specific strategies and a framework for achieving them over the next five years, and provides the working tool and basis for:

- Development of annual work plans for board and committees, and meeting agendas
- Development of the annual operating and capital budgets
- Board of Trustees recruitment
- Identification of committees and task forces
- Annual performance reports of committees and Board of Trustees
- The Annual Report and other stakeholder communications (including fundraising appeals)
- Other performance reports to stakeholders, including funders and government agencies

Each year, the Strategic Planning Committee will review and refresh the plan with input from the staff and full board. Stakeholder input will be sought as needed.

VISION STATEMENT

The Middletown Springs Historical Society is the community center for the understanding and appreciation of the evolving history of Middletown Springs. *(Adopted 12/5/2009)*

MISSION STATEMENT

The mission of the Middletown Springs Historical Society is to engage the community in understanding and appreciating the changing history of Middletown Springs, and to encourage local historic preservation.

With sound fiscal management and through collaboration with local, state and national institutions, the Society realizes its mission by researching, interpreting and publishing facts and stories of the town's history and genealogy; by collecting, conserving and exhibiting local artifacts; by acquiring and preserving significant historic places; and by involving the public through diverse educational technologies, community events and educational programs.
(Adopted 12/5/2009)

MIDDLETOWN SPRINGS HISTORICAL SOCIETY STRATEGIC GOALS 2021 – 2025

Goal #1 Education Outreach: Develop and expand MSHS as a valued community center by offering relevant educational and public programming for adults, families, and children using strategic collaborations and diverse technologies to foster the public's understanding and appreciation of Middletown Springs history.

Goal #2: Social Media Programming: Make MSHS programming and collection available to the public through website and social media.

Goal #3: Public Events and Community Outreach: Strengthen existing and pursue new community relationships by drawing in new partners to create relevant public programs, and events. Grow membership and maintain contact with membership.

Goal #4 Collections Management: To promote and share Middletown Springs' history with the community. MSHS collects, manages, conserves, and exhibits local artifacts that fully support its interpretive and programmatic goals, ensuring their accessibility to diverse audiences for research and enjoyment, according to professionally accepted standards.

Goal #5 Building and Landscape Stewardship: Maximize the use of the Adams House and Mineral Springs Park to provide a welcoming, physically and technologically accessible, and safe space for residents, visitors, and volunteers to gather, learn, and work; a secure repository for collections; and the flexibility to meet the growing needs of the MSHS mission and the community.

Goal #6 Organizational Infrastructure: Actively plan for sustainable organizational leadership and continuity by developing the MSHS's human resources to meet the goals of this plan and ensure that Board and volunteers have the information and tools they need to excel in their roles.

Goal #7. Financial Growth and Sustainability: Develop a plan of financial growth and sustainability that focuses on prudent management of current income and investments, diversifies sources of annual income, and grows the endowment.

TOP EXTERNAL TRENDS

As a result of the strategic planning retreat, the following external trends were identified as having the greatest potential for building audience and growing financial resources for MSHS:

- Vermont Curators Group – collaboration on thematic exhibits
- Vermont Humanities collaborations with historical societies
- New residents coming to Vermont as a lifestyle choice
- Installation of broadband means more people able to work from home

GOALS AND STRATEGIES 2021 – 2025

Timeframes for Strategies

- Continuing and short-term tasks for the coming year in black
- Intermediate tasks in green (2022-2023)
- Long-term tasks in blue (2023-2024)
- Very long-term tasks in red (2024-2025)

Goal #1 Education Outreach:
Develop and expand MSHS as a valued community center by offering relevant educational and public programming for adults, families, and children using strategic collaborations and diverse technologies to foster the public's understanding and appreciation of Middletown Springs history.

Strategies:

A. Develop new or enhance existing educational programs for local schools/youth programs to foster understanding of our shared heritage and to supplement local history curricula with onsite activities and classroom visits.
(Existing programs: museum tours, Springs Park tours, placing flags on veterans' gravesites in the Old Cemetery, VHS history kits, historical tours)

B. Develop and create a program of internships to further the MSHS's programmatic, community development and curatorial work.

Goal 2: Social Media Programming: Make MSHS programming and collection available to the public through website and social media.

Strategies:

A. Appoint a Social Media Committee.

B. Upgrade MSHS website and social media to support educational and public programming

C. Recruit and train a small group of interns and volunteers to assist with all the above.

D. Work with Education Committee to augment educational programs.

Goal #3: Public Events and Community Outreach:
Strengthen existing and pursue new community relationships by drawing in new partners to create relevant public programs, and events. Grow membership and maintain contact with membership.

Strategies:

A. Coordinate a new or revitalized Program/Events Committee to be responsible for existing programs (Open House exhibits/presentations/discussions, collections care speakers, oral history discussion, newsletters) and new ones.

B. Create a Membership Committee and expand the MSHS membership to increase the pool of volunteers, board members and advocates for MSHS's work.

Goal #4 Collections Management: To promote and share Middletown Springs' history with the community. MSHS collects, manages, conserves, and exhibits local artifacts that fully support its interpretive and programmatic goals, ensuring their accessibility to diverse audiences for research and enjoyment, according to professionally accepted standards.

Strategies:

A. Manage collections holdings responsibly and grow them intentionally to support our educational mission.

B. Address long-term collection care, storage, and exhibit needs to ensure preservation and access.

C. Appoint an Electronic Records Manager to maintain all collection management information using Past Perfect.

D. Plan and develop rotating exhibits highlighting relevant topics and current research that will engage audiences using a variety of interactive approaches, in collaboration with local historical societies.

Goal #5 Building and Landscape Stewardship: Maximize the use of the Adams House and Mineral Springs Park to provide a welcoming, physically and technologically accessible, and safe space for residents, visitors, and volunteers to gather, learn, and work; a secure repository for collections; and the flexibility to meet the growing needs of the MSHS mission and the community.

Strategies:

A. Create a Building and Landscape Stewardship Committee.

B. Keep up with ongoing maintenance and upgrades of Adams House and Mineral Springs Park.

C. Plan for new exhibit & storage space for A.W. Gray equipment.

Goal #6 Organizational Infrastructure: Actively plan for sustainable organizational leadership and continuity by developing the MSHS's human resources to meet the goals of this plan and ensure that Board and volunteers have the information and tools they need to excel in their roles.

Strategies:

A. Create a Governance Committee to manage ongoing healthy operation of the Board through thoughtful recruitment and training; to manage an active committee /task force system; to develop a leadership succession plan; and to provide the information and tools necessary for board and committee members to excel in their roles.

Goal 7. Financial Growth and Sustainability: Develop a plan of financial growth and sustainability that focuses on prudent management of current income and investments, diversifies sources of annual income, and grows the endowment.

Strategies:

A. Revitalize Finance Committee to continue prudent management of current income and investments.

B. Finance Committee, working with the Building & Landscape Management, Collection Care & Management, and Program/Events Committees, will plan a financial campaign for preservation of and access to the collections including capital funding for building projects.

APPENDICES

Appendix A: Planning Methodology

In May 2019 the MSHS board decided to follow up on strategic planning that was done in 2009. Realizing that a planning consultant would be able to guide us to a better result, we asked Eileen Corcoran, Director of the *Vermont Historical Society*'s *League of Local Societies,* for names of strategic planning consultants in our area. Eileen suggested Anne Ackerson of Troy, N.Y., someone with whom Pres. David Wright was acquainted through her planning work for the Board of the Slate Valley Museum in Granville, N.Y.

Ms. Corcoran also suggested applying for a grant to cover the consulting fee from the Vermont Community Foundation in Middlebury. We applied and were awarded a grant to cover Ms. Ackerson's fee.

Ms. Ackerson met with the board in September 2019 and sketched out the planning process.

- **Information Gathering**: Including surveys, interviews and self-assessment of strengths and weaknesses by the board;
- **Visioning Retreat**: To be led by Ms. Ackerson with current and past board members and community stakeholders;
- **Draft Strategic Plan Framework** that will develop into the actual Strategic Plan;
- **Success Measures** used to guide prioritization and decision making;
- **Review and Follow-up** to keep the process moving forward over future years.

A board committee including Pat Hemenway, Michele Pagan, and David Wright wrote a SWOT survey (looking for strengths, opportunities and threats to the organization) and distributed it to local MSHS membership; it was completed by 35 members. For a benchmark comparison, we chose four other comparable Vermont history organizations and interviewed their directors or presidents with a list of prepared questions about their membership, organizational structure, finances, operations, and their relative successes in achieving their mission. We researched historical societies in Rutland County to compare their dues structures with ours, and we examined MSHS membership numbers and fundraising totals for the past decade. We also prepared an overview of the MSHS collections and their storage situations.

A day-long retreat was held in early January 2020, with 25 participants including MSHS board members, interested MSHS general members, Town stakeholders (elected officials, and members from the MS Public Library, and other community organizations), and invited leaders from five Rutland County town historical societies. Summaries of the results of the research topics were supplied to all participants as well as copies of relevant museum journal articles chosen by Ms. Ackerson.

The retreat agenda explained the planning process, introduced discussion of the handout material in relation to envisioning the future of the community and the future of the MSHS, and examined how MSHS measures up to the goals in the MSHS Mission and Visions Statements.

Trends in museum visitations, museum practice, collaboration among humanities organizations and the future of philanthropy and fundraising were presented and discussed.

Group discussion identified themes and goals for the MSHS future and drew correlations between these themes and goals, and trends in the local and national museum community. Obstacles to achieving goals and strategies to overcome these obstacles were considered.

Ms. Ackerson skillfully led the discussions while recording responses and comments.

Later in January, Ms. Ackerson compiled her notes and drew on that information to draft the Planning Framework that was to be the basis for this Strategic Plan. The Strategic Planning Committee of Hemenway, Pagan, and Wright met weekly to edit the Framework section by section. They refined goals and tasks, reorganized and consolidated responsibilities, and established time frames for completing tasks. They edited success indicators to conform with changes in goals and tasks.

The Covid-19 pandemic, arriving in Vermont in late March, delayed work on the plan framework. In-person committee and board meetings were canceled and replaced with telephone conference calls, which were less efficient and more tiring than face-to-face meetings. The entire process was delayed by months. Due to these delays, the time frame for the Plan was changed from (fiscal) 2020-2024 to (fiscal) 2021-2025.

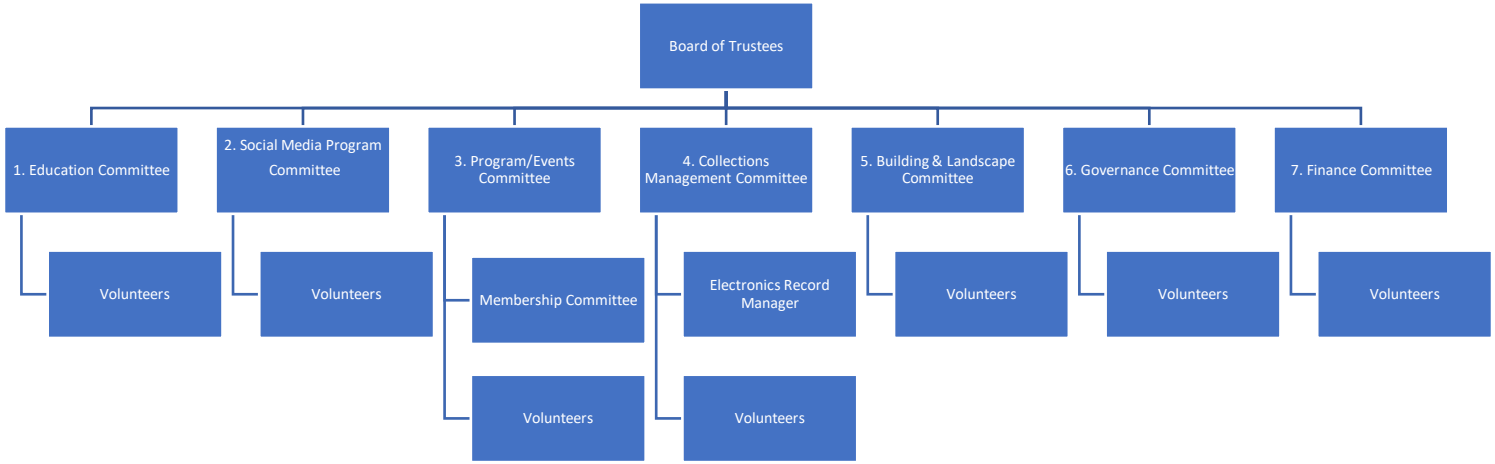
The final version of the plan was prepared by Ms. Ackerson for approval by the full MSHS Board of Trustees.

Appendix B: Board of Trustees

Board of Trustees Oct. 2019 – Sept. 2020

David Wright, President
Jon Mathewson, Vice President
Taina Ehrlich, Secretary (resigned 01/01/2020)
Pat Hemenway, Treasurer
Pam Johnson
Michele Pagan
Charles Stevens
Theron Krouse

Board of Trustees Oct. 2020 – Sept. 2021

David Wright, President
Pam Johnson, Vice President
Charles Stevens, Secretary
Pat Hemenway, Treasurer
Michele Pagan
Theron Krouse

Appendix C: Organization Chart