

# **Estero Historical Society Strategic Planning**

## **Today thru 2025**

Our Strategic Plan is the working document that will chart our course through the coming years. This strategic plan identifies our Society's goals for the next three years and outlines how we plan to achieve these goals. Although our society will engage in future planning for specific activities, this strategic plan is the "master plan" for our society

### **Our Mission Statement**

The mission of the Estero Historical Society is to educate and inspire the community by preserving and sharing the rich history of Estero.

### **Goals**

1. Ensure sufficient annual funding to continue the operation of the Society
2. Recruit and form a cohesive and energetic board to support the mission of the Society
3. Ensure the History of Estero is preserved
4. Provide a place to visit and learn the history of Estero
5. Maintain a reference room and a virtual presence to research and learn about the history of Estero
6. Share the history of Estero with all age groups
7. Promote Membership growth

### **Objectives**

1. Expand knowledge of Society in the Greater Estero Community
2. Secure technical/business/legal/tax consultants on a pro bono basis
3. Increase
  - a. Fundraising
  - b. Donations
  - c. Sponsorships
  - d. Donations in kind
  - e.
4. Document the History of the Society – First 25 years
5. Maintain a positive annual cash flow
  - a. Increase Grants/Donations
  - b. Create an endowment fund for operations
6. Digitize all records
  - a. Categorize and link
  - b. Virtual access
7. Find/Secure/Purchase artifact donations
8. Create slide shows and videos
  - a. Events/activities
9. Volunteers
  - a. Recognize Volunteers

- b. Ensure succession planning in all volunteer positions

## **Activities**

1. Raise community awareness of the EHS
  - a. Tours of our buildings
  - b. Artifacts displays
  - c. Host programs/events
  - d. Provide area business displays
2. Undertake community fundraising
  - a. Yard sales
  - b. Assessment fairs
  - c. Teas
  - d. Luncheons
  - e. Annual Holiday Luncheon
  - f. Society Restaurant nights
3. Develop a maintenance plan for our buildings
  - a. Cottage
  - b. Schoolhouse
4. Expand youth programs
  - a. 4<sup>th</sup> & 7<sup>th</sup> grade essay contests
  - b. High School essays/scholarships
  - c. Summer camp
  - d. School break camps
5. Continue educational lectures and speakers
6. Host more social events
7. History
  - a. Document the history of the Society – 25 years
  - b. Compose a book for sale in the gift shop
8. Artifacts
  - a. Cataloging
  - b. Lending
  - c. On loan
  - d. Purchasing
  - e. Refurbishment
  - f. Displaying
  - g. Storing
9. Document position descriptions
  - a. Board
  - b. Volunteers

## **Resources**

1. 99 Year lease on property at Estero Community Park
2. 1904 Schoolhouse Building
  - a. Contents and artifacts

- b. Storage
  - c. Mechanical systems
  - d. Insurance
- 3. 1902 Hall-Hanson-Collier House (Cottage) Building
  - a. Contents and artifacts
  - b. Gift shop
  - c. Storage
  - d. Office and admin supplies
  - e. Office equipment
    - i. Computer, Printer, Phone, Modems
    - ii. Microphone, speakers, headset
  - f. Mechanical systems
  - g. Insurance
- 4. Printed materials
  - a. Past articles
  - b. History
  - c. Minutes/by-laws/articles of incorporation
  - d. Brochures
  - e. Pictures
- 5. Deck
  - a. Area for Society socializing
  - b. Potential for Community socializing
  - c. ADA access to both buildings
  - d. Potential for non-society fundraising events
- 6. Financial
  - a. Accounts
    - i. FineMark Bank
      - 1. Checking account
      - 2. Safe Deposit Box
    - ii. Edward Jones
      - 1. CD's
      - 2. Investments
    - iii. PayPal
  - b. Working cash
  - c. Software
    - i. QuickBooks
- 7. Volunteers
- 8. Electronic and print presence
  - a. Social Media Facebook
  - b. Google and Gmail
  - c. Newspapers and Magazines
- 9. Maintenance tools, equipment, and supplies

## **Strategies**

### **Strengths**

1. As a result of a bequest, we currently have funds to operate
2. Generous patrons who donate regularly
3. Support of the Estero Community Parks staff
4. Dedicated Board with new ideas and approaches
5. Generous with their time volunteers
6. Growth of a new Village

We're working to expand on these strengths to get more volunteers, increase community awareness, and reach all age groups in the greater Estero area.

### **Weaknesses**

1. Limited knowledge of Society in the greater Estero Community
2. Volunteers
  - a. Aging force
  - b. Position descriptions
  - c. Cross training in other positions
  - d. Back-up for every position
  - e. Technology challenged
3. Limited ability to fundraise
4. Need volunteers to organize/lead events/activities
5. Deferred Maintenance
  - a. Deck
  - b. Cottage railings
  - c. Cottage eaves (woodpecker damage)
  - d. Gutter guards
6. Outdated information technology equipment
7. Centralized virtual (cloud) storage

We're working to mitigate these weaknesses by utilizing the talents of the high school and college volunteers to help with technology advancements

### **Opportunities**


1. Recruit more volunteers
  - a. FGCU, Area High Schools, FSW
2. Increase membership
3. Further identify outyear event/activity planning
4. Enhance website
5. Develop a structure for archives in cloud
6. Load archival documents in Cloud
7. Develop a process for access to archival documents in the Society cloud
8. Gather and display period archives

With additional funding and volunteers, we can reach out to additional schools, groups, and participate in community events. Fundraising activities and events require volunteers to lead, organize, and manage events.

#### Threats

1. Losing Volunteers
  - a. Death, Illness, moving out of the area
2. Maintenance safety issues requiring closing of buildings
3. Operating in the negative (cashflow)
4. Funding
5. Weather
6. Pandemic

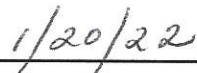
This document will be reviewed annually prior to the annual meeting and updated every 3 years.



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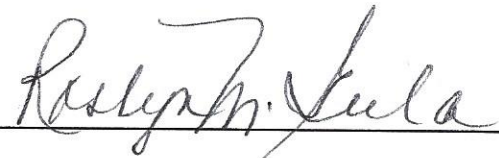
Gail Langner

President



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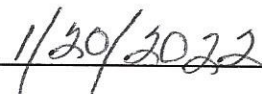
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Roslyn Gula

Vice President



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