



Pictou County Genealogy & Heritage Society



Strategic Plan April 2013

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*This plan was developed with information and input collected from
the PCGHS Board of Directors in sessions on March 5 and 26, 2013*

Strategic Plan for Pictou County Genealogy & Heritage Society

Vision

**The Pictou County Genealogical and Heritage Society is the
“Portal for Scots: Past, Present and Future”**

Mission

Telling the story of Scots in the New World

Values

- **Stewardship:** PCGHS is a responsible steward of the assets in its care. We preserve heritage for the purpose of knowledge transfer to future generations. We are the keepers of heritage – tangible and virtual.
- **Accountability:** As volunteers and staff we are accountable to the organization, and to one another. As an organization we are accountable to our funders, and our stakeholders. We do what we say we’re going to do. We are transparent. We listen to feedback.
- **Partnership:** We are open to change, innovation, and others. We are inclusive. We value partnerships and collaboration. We understand that partnerships improve our efficiency, effectiveness, and reach.
- **Consensus:** We strive for consensus. We work to support our common vision and goals.
- **Positive:** We are a positive voice in the community. We are proactive heritage advocates.
- **Integrity:** We act to build trust in all our relationships. We are honest and open in all our communications and dealings.
- **Respect:** We respect one another, our staff, our clients, our partners, and our stakeholders. We value individual strengths and utilize them.

Our Organization's Context

The organization's current context is driven by three factors:

- Financial Position and the need for common vision;
- New Media; and
- The Need to Set Priorities.

Financial Position

Thanks to several generous donations, PCGHS today is in a remarkably strong financial position. These gifts have provided the organization with a financial security as never before, which has opened the organization to new opportunities for pursuing and fulfilling its mandate.

And while this is an enviable situation, it is not without risks. With choice comes the potential for conflict as competing visions surface for how best to use, direct and steward the resource. The Board and staff have determined that establishing and communicating the organization's vision, mission, values, and priorities are the best way to manage these risks and guide the organization's work.

New Media

Today humans interact in the virtual world as much as they do in the physical world. Their first, and sometimes only, experience of a place is online.

PCGHS recognizes that, to the extent the organization focuses on driving traffic through its doors, it may be overlooking the potential impact of this reality. To that end, PCGHS recognizes that it also needs to develop a "virtual door", connecting and engaging with its audience through these important new channels of web, video, and social media. Where once Pictou was the principle portal for Scots journeying to the New World, so today PCGHS will be the virtual portal for Scots the world over, connecting them with the story of the Scottish immigrant and settlement experience.

The Need to Set Priorities

PCGHS fills many important roles in the area of heritage stewardship:

- Maintaining a museum collection,
- Preserving extensive archives,
- Providing genealogical research resources, and
- Housing an exhibition centre.

Each of these requires resources to maintain, financial and human. There is also the very real limitation of physical space to accommodate an expanding collection.

Establishing the relative importance of each of these functions, not only in relation to one another but also in relation to the vision, mission and values of the organization, will provide direction and clarity for the Board and staff.

Goals and Strategies

Goal #1 – Increase Visitation

At the end of the day, it's a numbers game. Delivering more visitors to the museum can only strengthen our position and solidify our future as part of the Nova Scotia Museum system. Being part of NS Museum is vital to the sustainability of our organization; we benefit in the form of significant funding contribution to our full time staff person, and access to training, marketing, networking, and other resources. It would be very difficult for our organization to fulfill its mandate without this partnership.

Success Indicator:

1. Annual renewal of NS Museum status
2. Increase visitors to McCulloch House and related sites by 15% per annum.

Strategies

Strategy #1: Invest in Re-Branding and Marketing Renewal

Re-branding the organization is central to our ability to distinguish ourselves in the marketplace and clear up the current confusion that exists between our organization and the Hector Heritage Quay. This will involve the development of a new logo and tag line, which clearly and consistently communicates our USP (unique selling proposition), and a plan for updating all communications, such as: signage, advertising, and other materials.

Strategy #2: Initiate Beautification, Façade, and Facility Improvements

Beautification, façade and facility improvements will help to drive traffic and build interest. Re-developing and re-positioning our grounds as a community gathering place, a family-friendly picnic park, and outdoor concert venue will open our facility to new uses and new visitors.

Strategy #3: Undertake Product Development: After the Hector

Visitors have identified a gap in their experience when visiting Pictou: they want to learn about what happened in the days and years after the Hector's arrival. Developing an interpreted experience and programming around this piece of the story is an opportunity that will generate renewed interest in our site.

Strategy #4: Establish Partnerships that will Improve Awareness and Drive Traffic

Partnerships are central to achieving all the goals and strategies outlined in this plan. Immediate and specific opportunities that must be explored include:

- Pictou Waterfront: Hector Quay Society and Fisheries Museum
- DEANS: Visitor Information Centre at the Pictou Rotary
- PIER 21: journey from the immigrant story to the Scottish immigrant story
- Dalhousie/Kings: celebrating the Thomas McCulloch story
- Local Municipalities

These partnerships should be in the form of physical presence, signage, cross-promotion, packaging or outreach to increase awareness among frontline staff and leadership.

Goal #2 – Improve Accessibility and Awareness of the Museum, Collection, and Thomas McCulloch Story

Establishing a virtual door (or experience) is vital to achieving our vision and mission; engaging people virtually is the best opportunity for converting them into a visitor. Online media provides unsurpassed means of connecting with the Scottish diaspora the world over.

Success Indicator:

1. Increase online readership by 15% per annum
2. Increase memberships by (10, 15, 20%)
3. Increase visibility on partner websites by 50%

Strategies

Strategy #1: Develop the Virtual Portal

This strategy essential means that everything that is done on site should also be promoted and available online. This entails developing a plan for the expanded use of online media (web, social media, video) to deliver information/interpreted history, and provide access to archives.

A virtual portal plan will:

1. Prioritize the digitization process in relation to the organization's Vision and Mission,
2. Explore business models for monetizing online access to materials; the plan should investigate and make recommendations as to the appropriate formula for online content delivery (free vs. paid), and
3. Determine the appropriate mix of online media for content delivery.

Strategy #2: Promote the Dr. Thomas McCulloch story

Explore partnerships and promotional opportunities that help to generate awareness of the significance of Dr. Thomas McCulloch and his contributions to liberal education. For example, the organization could investigate the feasibility of developing a Canadian Heritage Moment about Thomas McCulloch, or creating its own video vignettes.

Action Plan

Goal #1 / Strategy #1 - Increase Visitation (Re-Branding)

Action to be taken	Who is accountable	What is the timeline	What are the costs?
Identity			
Signage			
Advertising			
Other Materials			

Goal #1 / Strategy #2 - Increase Visitation (Physical Space)

Action to be taken	Who is accountable	What is the timeline	What are the costs?
Beautification of Grounds			
Façade Improvements			
Facility Improvements			
Family Picnic Park			
Bandshell for community events			

Goal #1 / Strategy #3 - Increase Visitation (Product Development)

Action to be taken	Who is accountable	What is the timeline	What are the costs?
Interpretive plan			
Exhibit Development			
Programming			
Launch			

Goal #1 / Strategy #4 - Increase Visitation (Partnerships)

Action to be taken	Who is accountable	What is the timeline	What are the costs?
Pictou Waterfront			
DEANS (Rotary VIC)			
Pier 21			
Dal/Kings Univ.			
Local Municipalities			

Goal #2 / Strategy #1 - Improve Accessibility (Virtual Portal)

Action to be taken	Who is accountable	What is the timeline	What are the costs?
Virtual Portal Plan			
Digitization			
Website/Social Media/Video Development			

Goal #2 / Strategy #2 - Broaden Awareness (Dr. McCulloch)

Action to be taken	Who is accountable	What is the timeline	What are the costs?
Develop strategy to promote McCulloch story			
Implement strategy to promote McCulloch story			

Appendix: SWOT Analysis

This information was harvested from planning sessions hosted on March 5 & 26, 2013.

Strengths	Weaknesses
<p>Marketing/Outreach</p> <p>Events can help drive our objective to get more people through the door.</p>	<p>Marketing/Outreach</p> <p>We need to maximize our exposure; there are still so many people who don't know who we are, what we do, and that we are not the Quay.</p>
<p>Serving Our Clients</p> <p>Our objective is to get more people through the door.</p>	<p>Serving Our Clients</p> <p>We could be limiting ourselves by viewing our door as just the physical door; we need to consider the virtual door as vital to achieving our vision and mission.</p> <p>Clients are looking for the story after the Hector. This is a gap that is missing for those who come to visit.</p>
<p>Operations/Processes:</p> <p>We do many things: "collect, preserve, share", genealogical records (research), exhibits and events, museum.</p> <p>We have a great property with opportunities for gardens, picnics, outdoor exhibits.</p>	<p>Operations/Processes:</p> <p>We need to determine our focus, e.g., research vs. exhibits.</p> <p>Property is not currently seen or used as a community gathering place.</p>
<p>Leadership:</p> <p>PCGHS has a revitalized Board with a shared commitment to visioning, goal setting and expressing core values.</p>	<p>Leadership:</p> <p>PCGHS wishes to be a more proactive advocate for heritage, including built heritage. In the past it has been reactive.</p>
<p>Financial:</p> <p>PCGHS is in a very strong financial position. Ample resources are available to the organization as never before.</p>	<p>Financial:</p> <p>Without a focus or direction there is potential for conflict from competing visions for how to manage, invest and direct the organization's resources.</p>
<p>Technology:</p> <p>Our microfiche is more permanent than digital and therefore we have a responsibility to maintain this seemingly "outdated" technology.</p>	<p>Technology:</p> <p>Maintaining these technologies (e.g. microfiche) may make our organization appear outdated. We will need to communicate the permanence and importance of these early technologies.</p>

Opportunities	Threats
<p>Marketing/Outreach</p> <p>Pictou's waterfront is benefitting from new investment. We need to explore having a kiosk there in order to direct traffic to our facility.</p> <p>Genealogy on wheels: remote, off-site groups.</p> <p>More outreach. Heritage Advocacy. Concerts. Speaker Series (video?). Roving interpreters for the waterfront.</p> <p>Presence at Saltscapes and New Hampshire Games.</p> <p>Educate young people. Whet appetite for history.</p> <p>Partnerships: Quay Society, Pier 21.</p>	<p>Funding Partner</p> <p>As part of the NS Museum system, we have an obligation to maintain numbers/visitation at McCulloch House. Numbers are currently down. This could impact our position with NS Museum.</p>
<p>Trends</p> <p>Awareness of the value and importance of Liberal Education is on the upswing; the McCulloch story is the genesis of liberal, open, accessible education.</p>	<p>Trends</p> <p>The McCulloch Story (who he is, his significance) is not widely known.</p>
<p>Visibility</p> <p>Need improved directional and location signage</p>	<p>Visibility</p> <p>Need improved directional and location signage</p>
<p>Social/Demographic/Technological</p> <p>Increasing use of new media (web, video, social, mobile) is a significant social transition that will impact our operations – we must find ways to harness technology to improve awareness of our work and access to our collection</p>	<p>Social/Demographic/Technological</p> <p>Increasing use of new media (web, video, social, mobile) is a significant social transition that will impact our operations – our inability to respond to this reality could negatively impact our organization</p>
<p>Technology:</p> <p>Genealogy App?</p>	

Appendix: Notes from Session 2

Check-in:

Reflecting on the aspects of your strategic plan that we have developed together, where do you feel the organization needs to go to meet that vision?

- Rebrand our organizations with the new vision, reaching out to the public
- Digitize our information, virtual hits
- Develop a marketing strategy
- Research the successful marketing strategies of other museums
- Undertake a facelift for our property
- Be creative to get people in and meet the province's criteria for operating as a museum
- Choose what we are passionate about
- Ensure that we are a safe place for kids

Open House:

How would our digitized data be useful for the world?

1. Are (we) selling or giving away our assets?
 - a. Free (taste/ inventory) and paid access (full suite)
2. First choice/ best chance for Scots "stuff"
 - a. Community history
3. Ease of access to data leads to incorporation in curriculum
 - a. Message to generations
4. Social media
 - a. Facebook/ twitter...
 - b. Stay on the leading edge – ready for future

In the short term, how do we get more visitors here?

1. Ideas – rear entrance – George Bedford land of way to direct attention to site – sign, etc
2. McCulloch House concerts – portable stage that can be hauled out as needed
3. Working in greater concert with Quay and Tourist Information Centre
4. Float/ presence in parades
5. Reaching out to 'upper towns'
6. More monies for paid ads
7. Determine (how?) who/ where to target
8. More teamwork approach with Quay to promote both sites and Pictou area
9. Pictou as a centerpiece of the "Northumberland experience" or "Northumberland summer"
10. Making sure that NS Museums know that we are a vital and growing member of their "family"
11. Work with PARL and Roots – how can we help support one another
12. Use "rebranding launch" to increase attendance

Now that we have money, do we need to be part of the museum system if it is at risk?

1. YES
2. Museum reviewing the budget in the province
3. Virtual #s count
4. Outside use is counted
5. 1 person is counted at both places
6. We get
 - a. 6 partners
 - b. "27 sites" as partners (6 locally managed)
 - c. Training, marketing, resources, networking
 - d. Dayle's pay 60% cost recovery and staff at McCulloch
7. If we lost our funding, we could not run as it is

What feature does our site excel in offering the tourist?

1. Band shell for music/ lectures
 - a. Use coasting hill
2. Barn (how?)
 - a. Farming "stuff"
 - b. Activities for kids
 - i. Resourced
3. Specialist v. vacationer
 - a. Genealogists
 - b. Family vacation
4. Bringing people here v. going to the crowds
 - a. Travelling shows
 - b. Enhanced attractiveness on site
5. Signage on usage

Do we have enough staff to accomplish our goals?

1. June 1 to October 15: 3 interpreters (programs fit with mission)
2. Consultant to determine how many man hours for digitization and curators
3. Goal, budget, staff
4. No!
5. Name the project, time frame, \$\$, staffing
6. Administrative assistant?
7. Looking at like-minded organizations
 - a. Design school
 - b. Agriculture

Check out:

Goals:

1. To continue the management of McCulloch House and its prospective programming

2. To share the Scottish Immigrant Story by increasing the number of visitors to the museum and through the virtual portal

Strategies:

1. Marketing
 - a. Advertising (finding your niche)
 - b. Signage (Pier 21)
 - c. Branding
2. Physical Space (product development)
 - a. Usage
 - b. Building (McCulloch House and Barn) improvements
 - c. Landscaping improvements
3. Digitalization/ Virtual Portal
 - a. Social media
 - i. Twitter, Facebook, ancestry.com
 - b. Data (in process)
 - i. Searchable database (currently a professional does the interpretive work)
4. Partnerships/ Relationships
 - a. NS Museum (we must satisfy the provincial requirements)
 - i. Meeting with new director to spell out the provincial policies
 - b. Other municipalities and organizations
 - c. Dalhousie University/ Kings
 - d. Pier 21
 - e. DEANS

Appendix – Thematic Analysis (Session 1 & 2)

Marketing	Rebranding	Virtual Door
We need maximum exposure of the facility	Potential for conflict: competing visions for using the resource	Social transitions – new media; what impact this had on our outreach and also on what we do here
Our opportunity is to make people aware of that we do here	Our opportunity is to make people aware of that we do here	Virtual doors (Tools, Media)
Provide access (signage/ lures) Signage	Outreach – public (Saltscapes/ N.H. Games)	Educate young people – whet appetite – how?
Outreach – public (Saltscapes/ N.H. Games)	Advocacy role for heritage (Proactive vs. reactive approach (void in the community))	Speaker series – video and put online
Hire a student/ roving interpreters/ tour guides	People want to come here	Technology
People want to come here	“Scottish cultural centre of Nova Scotia”/ North America	10 million members and not one person here
Develop a marketing strategy	Rebrand our organizations with the new vision, reaching out to the public	Can we measure/ equate a virtual visit to that of a physical visit onsite?
Research the successful marketing strategies of other museums	Choose what we are passionate about	Scottish portal
Be creative to get people in and meet the province’s criteria for operating as a museum	Making sure that NS Museums know that we are a vital and growing member of their “family”	Digitize our information, virtual hits
Float/ presence in parades	Use “rebranding launch” to increase attendance	Are (we) selling or giving away our assets? (Free (taste/ inventory) and paid access (full suite))
More monies for paid ads	Signage on usage	Ease of access to data leads to incorporation in curriculum (Message to generations)
Pictou as a centerpiece of the “Northumberland experience” or “Northumberland summer”		First choice/ best chance for Scots “stuff” (Community history)
Signage on usage		Social media (Facebook/ twitter...) (Stay on the leading edge – ready for future)
		Virtual #s count

Landscaping/ building improvements	Usage (existing resources)	Partnerships
Great property (Gardens – historic, Picnics, Outdoor exhibits, Participation in other town(s) activities)	Events can help drive our objective to get people thru the door	Outreach – public (Saltscapes/ N.H. Games)
Outside evening/ summer entertainment	The numbers to McCulloch House are down; people don't know about the story	Educate young people – whet appetite – how?
Waterfront developing therefore we have a kiosk there	Do we want to leave anything behind? Is our traditional vehicle of bringing people in the door outdated? – “microfiche”	Pier 21 partnership
More programs and activities – concerts?	Classroom visitation program	Waterfront developing therefore we have a kiosk there
Centre is a day trip destination	Genealogy on wheels (Remote/ off-site group sessions)	Opportunities to partner
The centre is a room filled with computer kiosks	The story after the Hector (our opportunity to interpret this #1 question)	Tangible portal – Hector Quay partnership
Undertake a facelift for our property	Speaker series – video and put online	Working in greater concert with Quay and Tourist Information Centre
Ensure that we are a safe place for kids	First choice/ best chance for Scots “stuff” (Community history)	Reaching out to ‘upper towns’
Ideas – rear entrance – George Bedford land of way to direct attention to site – sign, etc	Outside use is counted	Pictou as a centerpiece of the “Northumberland experience” or “Northumberland summer”
McCulloch House concerts – portable stage that can be hauled out as needed		Work with PARL and Roots – how can we help support one another
Band shell for music/ lectures (Use coasting hill) Barn (how?) (Farming “stuff”, Activities for kids (Resourced))		(In partnership with NS Museums) We get: 6 partners, “27 sites” as partners (6 locally managed), Training, marketing, resources, networking, Dayle’s pay 60% cost recovery and staff at McCulloch
Bringing people here v. going to the crowds (Travelling shows, Enhanced attractiveness on site)		Looking at like-minded organizations (Design school, Agriculture)

Other:

Where is our focus: research vs. exhibits

We have large financial opportunities

It is time to reflect and discuss the potential for conflict; we need connections

Research is a big priority

Live off of the interest: it will allow us to expand all the programs

Scottish theme

Specialist v. vacationer: Genealogists, Family vacation