

**THE MASSACHUSETTS HISTORICAL SOCIETY**  
**STRATEGIC PLAN, 2016-2020**

**THE MHS MISSION**

The Massachusetts Historical Society is a center of research and learning dedicated to a deeper understanding of the American experience. Through its collections, scholarly pursuits, and public programs, the Society seeks to nurture a greater appreciation for American history and for the ideas, values, successes, and failures that bind us together as a nation.

**THE MHS TODAY**

The MHS is an invaluable resource for the study of American history, life, and culture. Our collections tell the story of America through over twelve million documents, artifacts, and national treasures, including the personal papers of three presidents – John Adams, John Quincy Adams, and Thomas Jefferson. Since 1791 we have nurtured and spread knowledge and the appreciation of American history by preserving and enriching our collections, providing tools and services to support research, and cultivating scholarship. We are committed to the principle that knowledge of our nation’s past is fundamental to its future. We desire to reach a broad audience and to illustrate for them the importance of history in understanding change and continuity in our world.

Over the past decade we have made great strides in making our resources available to a wider public, both to meet our mission and to increase support. This aim has been greatly enhanced by the use of technology, especially through an improved website. ABIGAIL, our online catalog, and collection guides open our collections to all, and our digitization efforts have made increasing amounts of our material available to researchers. Library visitation is growing because of our on-line presence and an increase in the number of research fellowships we offer. A new endowed acquisitions fund has made it possible to add to our collections at a time when purchasing items has become more competitive.

Our public programs and exhibitions play a central role in reaching the public and dispensing knowledge. We offer a full roster of engaging programs including talks by established and emerging historians, history makers, and public leaders on topics that range from current events to the lives of individuals who shaped our country. Exhibitions highlight our collections or important themes and events, attracting a growing audience.

Our education programs, designed to enhance the teaching of history to school-age audiences, have grown substantially. Annually we provide workshops to over five hundred teachers from across the country focused on the use of primary documents to enrich the classroom experience. Teacher fellows use the MHS collections to develop new lesson plans that are added to our increasing catalog of online educational resources available to educators everywhere. The MHS is now the prime sponsor of Massachusetts History Day, which engages over a thousand students statewide each year. These efforts are augmented by a number of on-site student programs.

The Research Department has added fellowships and seminars and has presented much-praised conferences. Through its activities the MHS has built a national and international network of scholars who work in the fields in which we focus. Publications are attractive and include exhibition catalogs to further knowledge of our collections. The Adams Papers documentary edition has increased its output in addition to producing several popular works and providing increased digital access to unpublished materials and online tools.

Despite these advances the Society faces challenges as it seeks to widen its audience and attract the financial support it requires. To date, funding for these activities has come largely from unrestricted endowment income and from a stream of governmental, foundation, corporate, and individual grants tied to particular projects such as the ongoing publications of the Adams Papers and the processing or digitization of specific manuscript collections. However, investment losses suffered in the market downturn in 2008, only partially recovered since, forced a reduction in staffing levels as we worked to rebalance our budget and reduce our endowment spend rate to a level consistent with long-term market prospects. At the same time, new digitization costs and rising budget pressures on governmental grants have continued to strain the staff and slow vital efforts.

Since 2008 we have turned increasingly to public and educational programs to revitalize individual, foundation, and corporate giving to the Society. Our public programs are designed for all intellectually curious adults, and our educational programs are designed for teachers and students of history courses in middle and high school. In each case our goal is to attract new audiences to the MHS and to illustrate for them the importance of history in understanding change and continuity in our nation's affairs.

By expanding the range of MHS activities to embrace public programs and exhibitions, we have been building a community of members who share an interest in history, enjoy the social as well as the intellectual attraction of events at the MHS, spread the word through friends and family, and build public support for history and for the MHS. As a result of the growth of our public and membership programs, we have seen a growth in audience and a significant increase in annual contributions, and we expect annual support to continue to grow. To sustain that growth the Society faces several challenges: general interest in history appears to be in decline, our programs face competition from those offered by many other organizations in the Boston area, and the constraints of our budget and our building limit the size of our audiences. But there are good reasons to believe that, as we become "the" place for history, we will overcome these obstacles.

Demand remains strong for biographies, documentaries, and other stories, both national and local, offering historical perspective on the people, issues, and events of our time. No other organization in New England can meet that demand from the position of strength provided by our collections and network of those working in the field.

Our recent success with events that have filled our major venue, Ellis Hall, many times each year suggests that we can benefit from increasing the number of popular speakers and engaging topics. We should invest in a fund for speaking fees in order to meet market demands; we should also explore options for increasing space for exhibitions, lectures, and other events. Such investments could produce larger audiences of those who enjoy learning about history and who in time will appreciate and support our collections, research, and scholarship.

Through our educational programs, we have also been working with teachers of US history in grades 7 through 12 to bring history alive through lesson plans built on interesting and influential materials from our collections. Those teachers who have worked with our materials have been enthusiastic and have encouraged us to do more. The richness of our unique collections gives us an inherent competitive advantage, especially the text-based approach to learning that underlies the Common Core. New approaches to history education in response to the Common Core nationwide may attract new sources of governmental and foundation funding and open a new national market in which we have the opportunity to compete effectively.

If we can seize these opportunities, we have the capacity to make our programs for teachers self-sustaining. It will be important to build our presence as a center for the teaching of history; to support teachers interested in curriculum development; to draw on their insights and on the depth and breadth of our collections to produce a much broader array of lesson plans and guides; to market those plans effectively to a national audience; and to increase our fundraising from government agencies, foundations, corporations, and individuals.

Our collections and the community of scholars, researchers, teachers, and writers we serve provide the foundation for the Society's educational and public history programs. By building interest in and support for American history, these programs directly serve the MHS mission in themselves, but they also strengthen the Society as an organization dedicated to continuing to preserve and expand its collections and other research activities. After a decade of transformation and growth the Society finds itself poised to become an even greater influence in shaping the future of our nation.

## **THE STRATEGIC PLAN, 2016-2020**

We plan to meet these challenges and opportunities through the following goals:

### **I. REACH A BROADER AUDIENCE BY PROMOTING THE RELEVANCE AND IMPORTANCE OF HISTORY:**

- Make the MHS “the place for history.”
- Relate history to current events and issues.
- Attract and retain a larger and more diverse audience.
- Improve the teaching of history.
- Make the building more accessible and approachable.
- Use cost-effective marketing and public relations to promote the Society, its mission, and its programs and exhibitions.
- Use technology to improve the understanding of history.

### **II. ACQUIRE, PROTECT, AND IMPROVE ACCESS TO COLLECTIONS:**

- Expand the collections through acquisitions.
- Improve the storage, preservation, and security of the collections.
- Improve the accessibility of the collections, including collections remaining unprocessed and uncataloged.
- Create new digital collections and editions.
- Improve the library’s capacity to meet researcher demands.

### **III. STRENGTHEN OUR ROLE AS A CENTER FOR SCHOLARSHIP:**

- Build and secure the capacity to promote scholarship.
- Promote the Society’s role as the focal point for scholars working in our areas of interest.
- Raise awareness of our collections and how they support research.
- Support the Adams Papers and other important documentary editions.

### **IV. EMBRACE A CULTURE OF PHILANTHROPY:**

- Celebrate history with our growing community of members, demonstrate for them the importance of the MHS, and listen to and learn from them.
- Invite donors to support history and the MHS through annual, planned, and capital giving.

## **THE MHS IN 2020**

With full implementation of this Strategic Plan, the Massachusetts Historical Society will be widely recognized as a preeminent institution of American history, a thriving center for research and learning, and a respected voice for the importance of understanding our nation's past.

Our programs and exhibitions will celebrate the perspective American history brings to our own time and illustrate how it sustains our republic and guides our future. As the region's major venue for history presentations, we will produce programs and exhibitions that are thematic, tell stories, and explore turning points in the past. Where opinions vary, we will provide a forum for debate. Our exhibitions will travel nationally and internationally and will reinforce the Society's mission and significance.

Our collections will be viewed as a preeminent resource for the study of America by scholars and history enthusiasts around the globe, and we will provide unprecedented access to those materials through our library and website. Our center for teaching history will enliven the classroom experience through web-based materials, and we will advocate for the value of history in our schools' curricula.

The MHS will establish itself in Boston and New England not only as the premier resource for American history but also as a leading cultural institution. As a result we will attract increased financial support from individuals, foundations, corporations, and governmental agencies. Based on an assessment of our capital needs and financial capacity, we will launch a capital campaign to endow critical staff positions, to fund ongoing scholarly and educational programs, and to support the renovation of our facility to include additional space for programs, exhibitions, and classrooms.

Improved funding will reinforce the Society's core activities. Enhanced processing and increased digitization of our collections will open avenues of research. Seminal national conferences, seminars, and additional research fellowships will advance scholarship. We will extend the Adams Papers through another generation, publish other essential collections in print and online, launch an online magazine, and enrich our website. Greatly expanded public relations and marketing will support our presence, our mission, and our activities.

In 2020 the MHS will be a thriving and influential center for the study and advancement of historical knowledge and an advocate for its importance. We will reach a much larger audience who will use our resources, take part in our programs, join us as members, and support us in our mission to achieve a deeper understanding of the American experience. And we will have taken a significant step forward toward our vision of a renewed American understanding that our nation's past is fundamental to its future.