

ALBANY INSTITUTE OF HISTORY & ART

Strategic Plan 2015–2018



Albany Institute of History & Art

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Graphic design by Adam Hitchcock

Audiences are central to the AIHA experience



The Albany Institute of History & Art connects diverse audiences to the art, history, and culture of the Upper Hudson Valley through its collections, exhibitions, and programs.



Albany Capital of the State of New York, Jacques-Gérard Milbert, 1829, lithograph, ht. 7 1/2" x w. 11 3/4", Albany Institute of History & Art Purchase, 1944.22.13

The museum brings a global perspective to the art, history, and culture of the Upper Hudson Valley, creating physical and virtual experiences for the education, entertainment, and inspiration of people of all ages.



Connecting people to art and history since 1791



A Tour of Indian Ladder, Thacher Park, W.H Stillman and Joseph McKay photography, c.1880, albumen photographic print on card, ht.8 1/4" x w.6", Albany Institute of History & Art Library, Ser 27 108



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Morning, Looking East over the Hudson Valley from the Catskill Mountains (detail), Frederic E. Church (1826–1900), 1848, oil on canvas, ht. 18 ¾, w. 24 in., in original gilt frame, ht. 26 in., w. 32 in., Albany Institute of History & Art, gift of Catherine Gansevoort (Mrs. Abraham) Lansing, x1940.606.7

Overview of the Albany Institute of History & Art



Founded in 1791, the Albany Institute of History & Art (AIHA) is the oldest museum in New York State, beginning its legacy as the Society for the Promotion of Agriculture, Arts, and Manufactures. By the early twentieth century, the Institute had refined its focus to collect, preserve, interpret, and promote interest in the history, art, and culture of Albany and the Upper Hudson Valley from the seventeenth century to the present. Today, AIHA reflects 224 years of the changing interests and priorities of our stakeholders, including our donors, members, and the public we serve.

AIHA's collections numbering over 35,000 objects and include paintings, drawings, prints, sculpture, ceramics, silver, glass, cast iron stoves, textiles, clothing, and historical artifacts. Collections are exhibited in galleries and are housed in a custom built three floor collections storage facility, which opened in 2001, with a state-of-the-art central system that maintains optimal temperature and relative humidity and filters gaseous and particulate matter. All items are catalogued and access is available by appointment; AIHA is currently digitizing the collections for public use via our website. The library is a non-circulating research center holding almost 1 million reference and rare books, manuscripts, maps, architectural drawings, broadsides, ephemera, museum archives, and 100,000 photographs. Its primary users are AIHA staff, genealogical researchers, property researchers, scholars, graduate students, architects, historians, documentary filmmakers, archaeologists, and book publishers.

***Four-Column Parlor Stove**, designed by Ezra Ripley (about 1797–after 1860), Troy, New York, patented 1844, cast iron; ht.62", w.34", d.22, Albany Institute of History & Art, gift of Richard C. and Marjorie D. Rockwell.*

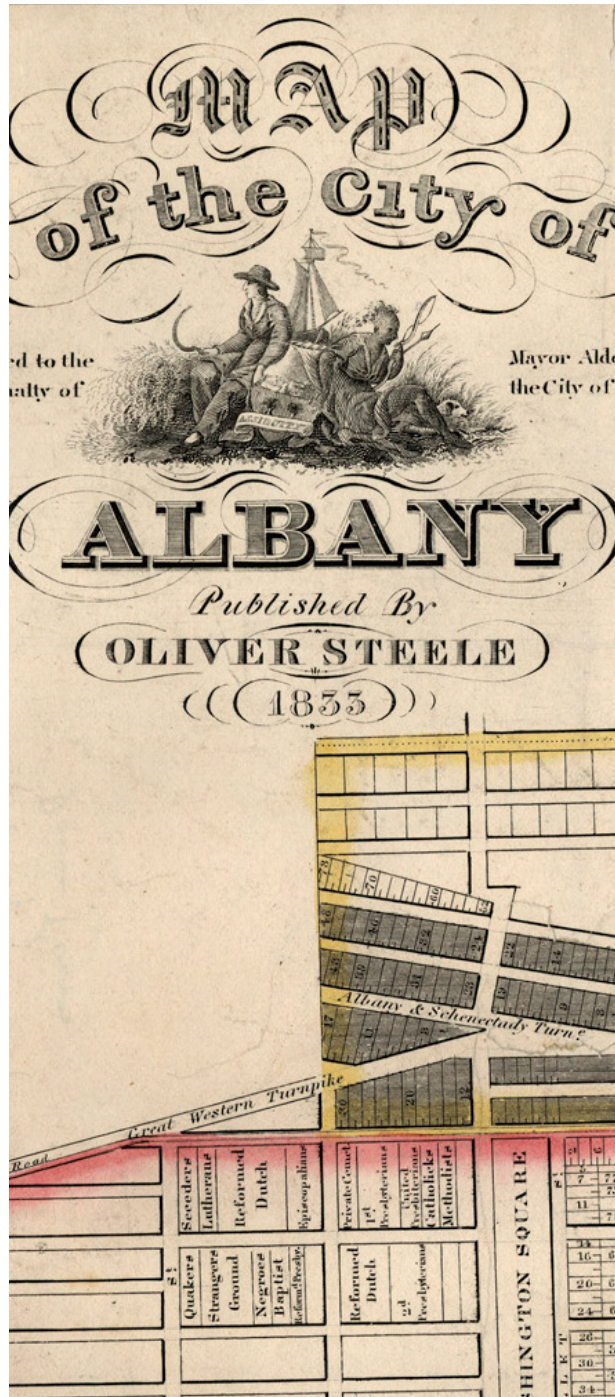
Overview of the Albany Institute of History & Art (cont)

AIHA is committed to documenting, interpreting, and advancing the culture and understanding of the Upper Hudson Valley region—a crossroads of histories, cultures, communities, and audiences—to build a regional cultural identity and sense of pride of our common histories and expressions.

The majority of AIHA's collections were made or owned in the Albany area or Upper Hudson Valley of New York State. AIHA's collections provide an understanding of the social, economic, and political networks within which artisans, merchants, and consumers operated and reflect the distinctive and diverse geographic and cultural forces that shaped this area of New York State. Due to this region's central role in the early development of the country, and Albany's importance as the state capital, much of AIHA's collections have national significance.

AIHA fulfills its commitment through the development and presentation of exhibitions and educational programming. AIHA mounts six to eight temporary exhibitions annually, which are developed to meet the following goals: show diversity of objects, ideas, multiple perspectives, and voices; create a sense of place that reflect regional identity; tell human stories that give audiences the ability to “meet people”; include audience input.

Map of the City of Albany (detail), published by Oliver Steele, 1833, ht. 12" x w. 15 3/4"
Albany Institute of History & Art Library, MAP 0015





Overview of the Albany Institute of History & Art (cont)

AIHA's education department connects our community to AIHA's collections and exhibitions through lifelong learning opportunities that serve toddlers to older adults. AIHA serves 10,000 students, teachers, adult learners, and families, including programs for school children and their teachers, drop-in art making lessons, scholarly symposia, and free family weekends. School programs are offered on site as outreach programs, as in-depth school partnership programs, and through our video conferencing program, all frequently supporting New York State curricula learning standards.

AIHA launched a new website in 2012 to raise its profile, attract younger and more diverse audiences, provide public access to the collections, extend service to our education community, and enhance efforts in marketing, public relations, fundraising, and visitor services.

Core Values



Community: We have pride in the communities we serve. We are committed to improving the quality of life in the Upper Hudson Valley region through community enrichment and revitalization.

Stewardship: We strive to respond to all internal and external inquiries or requests in a timely and courteous manner. We maintain a positive attitude and good communication both internally and externally. We are committed to serving the Upper Hudson Valley region through museum programming and outreach.

Loyalty: We will speak well of our colleagues publicly and defend each other if necessary. We are committed to the Albany Institute of History & Art, its mission, and its goals.



Delaware and Hudson Building (detail), photographed by Stephen Schreiber, c. 1918, gelatin silver print, ht. 7 1/2" x w. 10", Albany Institute of History & Art Library, Morris Gerber Collection, 1993.010.8663P

Core Values (cont)



Teamwork: We put the needs of the Albany Institute of History & Art as a whole ahead of the needs of our department. We are flexible, enjoy learning new things, and assist each other when the need arises. We maintain a positive attitude and environment in order to build and sustain staff morale. Success depends on teamwork.

Enthusiasm: We take pride in our work and remain aware of current issues and trends in the field. We value the museum environment and approach our work with intensity and vigor. We are committed to personal and professional growth.

Integrity: We recognize and acknowledge the abilities and contributions of our staff, board, volunteers, members, and audiences. We value the ideas and opinions of our colleagues and constituents, and strive to take the higher ground in working through conflicts. We respect each other and our audiences. We strive for diversity. We are dedicated to and responsible for our roles and accountable for our actions.

Grenadier Officer's Cap, Obverse (detail), unidentified maker, 1763–1768, wool, ht. 11" x w. 9 1/2"
Albany Institute of History & Art, gift of Mrs. Victor Morawetz, 1944.96



History of the Strategic Planning Process



Introduction

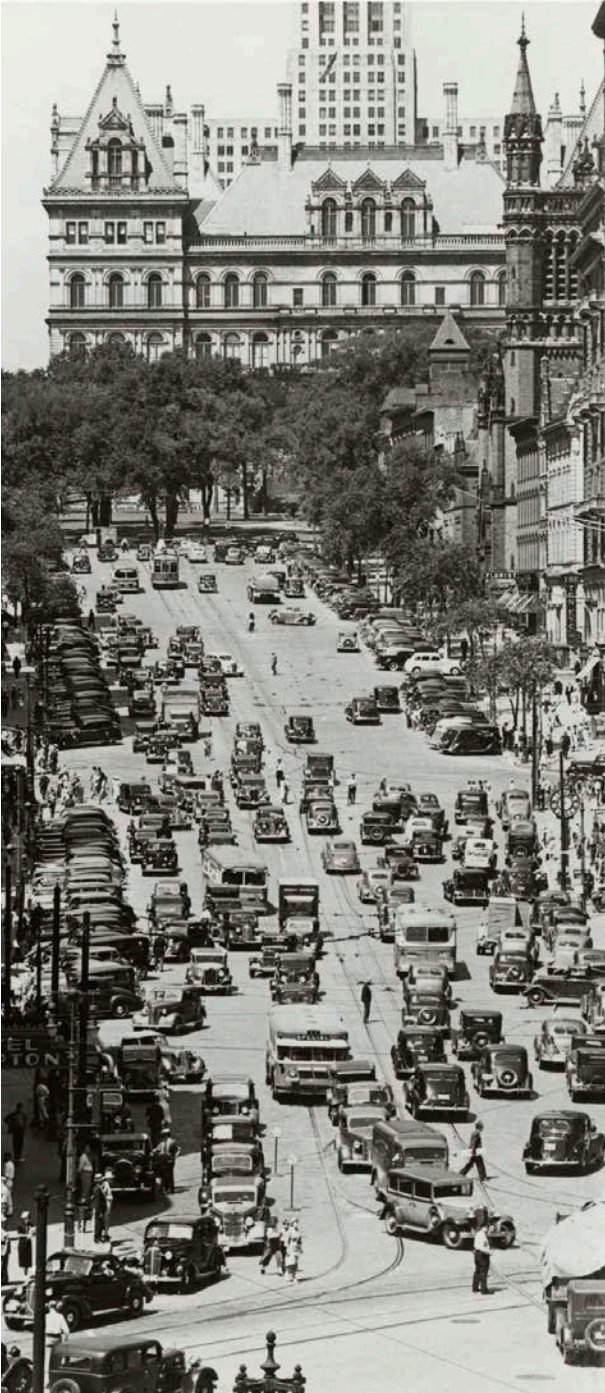
In the past five years the AIHA has experienced a period of change. Since 2009, we have welcomed twenty-one new board members, bid farewell to Christine Miles, our executive director of twenty-five years, overhauled our operational budget under the leadership of David Carroll, and in 2013, appointed Tammis Groft, who served as Chief Curator of AIHA for over thirty years, as executive director. Since Groft's appointment, she and the newly expanded board have discussed initiating an in-depth strategic plan: our last plan dated from 2009. Our need for an updated, community-based strategic plan was confirmed by the American Alliance of Museums (AAM), a national agency that defines best practices for museums. AIHA was re-accredited by the AAM in 2015.

Strategic Plan 2015–2018

AIHA has reshaped its mission and programs over its 224-year history. The museum has changed its name seven times and refocused its mission as the needs and interests of our community changed.

As AIHA continues to change and grow our goal is to develop a fully articulated strategic plan with a strong community component to guide the museum's decision making for the next four years. The first step was to analyze and choose the optimum strategic planning methodology for our needs.

*Aegis of the Goddess Isis (detail), bronze, height, 6", Egyptian, Late to Ptolemaic Period
Albany Institute of History & Art, gift of Heinrich Medicus, 2013.1.11*



History of the Strategic Planning Process (cont)



To begin, we received a grant from the Museums Association of New York (MANY) in partnership with New York State Council on the Arts to hire Anne Ackerson as museum consultant. With over thirty years experience, and as author of *Leadership Matters* (AASLH, 2013) Ackerson helped lay the groundwork for AIHA's strategic planning process.

The first strategic planning meeting, held on February 6, 2014, determined the scope of the planning process. In preparation, board and staff were sent strategic planning documents, provided by AAM and MANY, and a selection of plans produced by other museums around the country. Nineteen out of thirty-two board members attended and ten staff members out of fifteen. The group decided on a two-part approach with a goal to complete the strategic plan by the end of 2014.

Part I: A community engagement segment acted as an external fact finding program. To support this initiative we received a Community Foundation grant to hire Zone 5, a local PR and Marketing firm to help assess the needs and interests of constituents, including current users, members, funders, community partners, and non—users. Zone 5 met with AIHA staff and board to determine our needs, conducted focus groups and one-on-one interviews with community leaders and funders, and sent e-surveys to community and museum members (see Zone 5 Market Research and Community Engagement Report).

State Street 1937 (detail), unidentified photographer, Gelatin silver print, ht. 10" x w. 8"
Albany Institute of History & Art Library, 1993.010.4535.4P_MGC_317

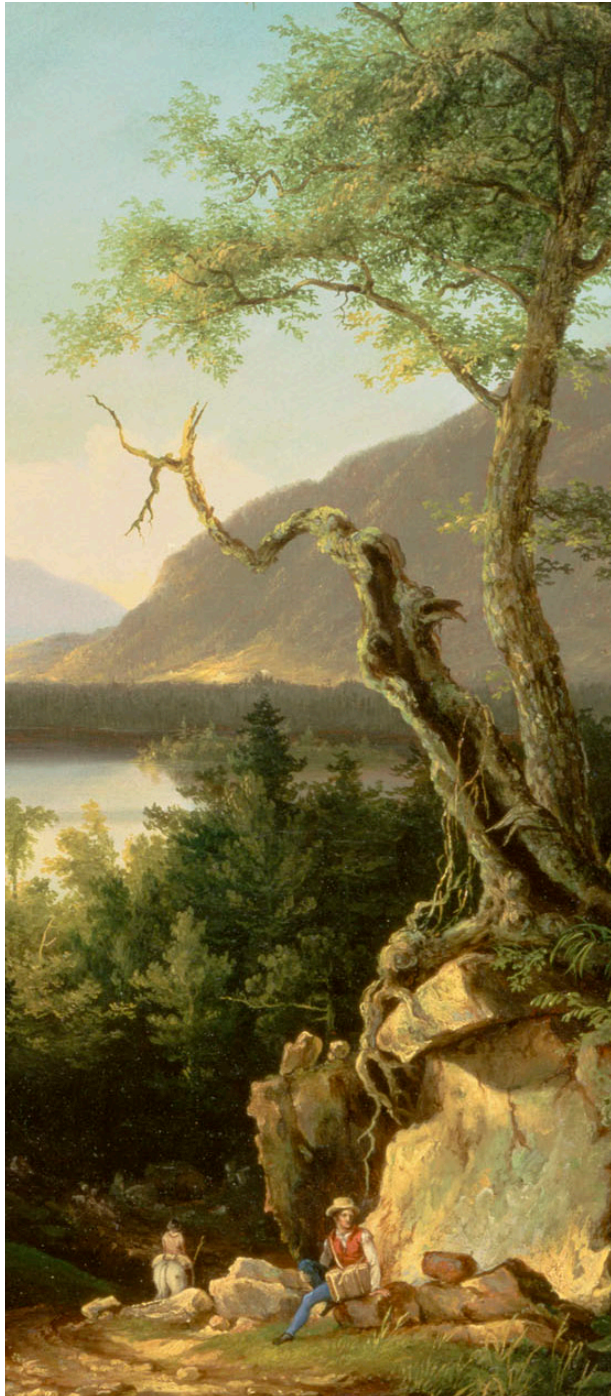
History of the Strategic Planning Process (cont)



Part II: Strategic plan development encompassed three phases, with additional funding from MANY, to hire Anne Ackerson.

Phase I: Anne Ackerson led a staff strategic planning session on September 5, 2014. In preparation for the meeting, each department was asked to prepare documents that included: department staff responsibilities; two departmental accomplishments in recent years; two short-term goals, and two long-term goals. The session concluded with discussions about strategies for enhancing community engagement (see AIHA Department Planning Notes, September 5, 2014).

Phase II: On October 16, 2014, Ackerson facilitated a day-long visioning session for AIHA board, staff and community representatives, including artists, educators, interns, and community members. Zone 5 presented an overview of their Community Engagement Report. To envision AIHA's future, the afternoon activity focused on external trends in our region. The last activity focused on five key areas: programming, collections and exhibitions, audience, facilities, and organizational excellence (see Visioning Session Notes, October 16, 2015).



Lake Winnepesaukee (detail), Thomas Cole (1801–1848), 1827 or 1828, oil on canvas; 25 1/2" x 35 1/4", Albany Institute of History & Art, gift of Dorothy Treat Arnold (Mrs. Ledyard) Cogswell, jr., 1949.1.4



History of the Strategic Planning Process (cont)



Phase III: A Strategic Planning Team was appointed consisting of AIHA committee chairs, department directors, and invited board members. Ackerson facilitated three additional sessions, one to focus on preparing a new mission, and vision statement and tagline, and two to facilitate the development of a fully articulated plan with goals, strategies, tasks, activities, timeframes, accountability, and resources.

Approval: AIHA's Strategic Plan was approved by the Board of Directors on January 26, 2015.

Thank you: AIHA thanks the following for their support of this endeavor to cover most costs: Museum Association of New York State; the Bender Foundation; and The Community Foundation of the Capital District. The remainder was funded by AIHA. The board, staff, and community members dedicated many hours to this project. Special thanks to Anne Ackerson, museum consultant, for her careful guidance through the process.

*Foot Stove (detail), wood, unidentified maker, the Netherlands, c.1675
Albany Institute of History & Art, u1975.8*



Executive Summary of the Strategic Plan 2015–2018



Founded in 1791, the Albany Institute of History & Art is the oldest museum in New York State and one of the oldest in the country. Throughout its long and venerable history the museum has changed its name seven times and reinvented itself several times to reflect the changing needs and interests of its community. The museum's collections are well-known regionally and nationally. Our exhibitions and programming for school and general audiences is well respected for its scholarship, innovation, and creativity. Through new board and staff leadership, a healthy economic future, changing demographics, and the needs of our region, we distilled our new guiding principle, revised our mission, prepared our first vision statement, and created new a tagline.

Guiding Principle: Audiences are central to the AIHA experience.

Mission: The Albany Institute of History & Art connects diverse audiences to the art, history, and culture of the Upper Hudson Valley through its collections, exhibitions, and programs.

Vision: The museum brings a global perspective to the art, history, and culture of the Upper Hudson Valley, creating physical and virtual experiences for the education, entertainment, and inspiration of people of all ages.

Tagline: Connecting people to art and history since 1791.

Yellow Enameled Plate with Dragons (detail), Chinese, Qing Dynasty, Qianlong period (1736-1795), enamel on copper, Albany Institute of History & Art, gift of Mary Taylor Moulton Hanrahan, 1945.15.148



Executive Summary of the Strategic Plan 2015–2018 (cont)



The Albany Institute's strategic planning process spanned ten months and involved board, staff, and community members, in addition to an extensive community engagement project carried out by Zone 5, a regional PR and Marketing firm.

Our new Strategic Plan places our audiences at the center of the museum experience and draws on the talents, commitment, and support of our board, staff, and community to build a financially sustainable operation over the next four years. The strength of the plan is based on audience feedback and the realignment of museum activities and responsibilities. The plan includes new initiatives and strengthens current "Best Practices." The commitment to this new approach to operations is a direct result of the strategic planning process.

To monitor the plan we have formed ad hoc committees for each strategy made up of board, staff, and community members. Our board committees (Executive, Finance, Collections, Nominating, Facilities, and Development) will continue to carry on the business and legal responsibilities of the museum.

Executive Summary of the Strategic Plan 2015–2018 (cont)



The Albany Institute of History & Art Strategic Plan 2015–2018 embraces three key goals, seven strategies, and multiple tasks.

Goal I: Enhance Community Engagement

Strategy A: Evaluate current audiences. Identify and grow new audiences in alignment with vision and strategic priorities.

Task 1: Collect and quantify all known audience data for the past three years (2012, 2013, 2014).

Task 2: Integrate operations (registers, onsite surveys) to refine audience data collection processes.

Task 3: Implement new data collection operations throughout the museum.

Task 4: Identify, purchase, and install new data management software to track audiences and members.

Task 5: Identify institution-wide audience sectors, growth opportunities, and objectives.

Task 6: Develop a new marketing plan to attract current and future audiences.

Task 7: Develop a rebranding campaign to attract current and new audiences.

*New York Central Building (detail), ca. 1929, oil on posterboard, ht. 46 ¾ in., w. 30 in., in original frame, ht. 49 ¼ in., w. 32 ½ in., signed, lower left: CHESLEY BONESTELL, inscribed, lower margin: NEW YORK CENTRAL BUILDING / PARK AVENUE, NEW YORK / AT * THE * GATEWAY * TO * A * CONTINENT, Albany Institute of History & Art, gift of the New York Central Railroad, 1959.130.94*





Executive Summary of the Strategic Plan 2015–2018 (cont)



Strategy B: Develop and present integrated approaches to exhibitions, programs, and collections that invite current and new audiences to reflect, explore, and actively respond in ways that promote personal discovery and life-long learning.

Task 1: With audience input, develop a diverse range of methods to engage the public in exhibitions, programs, and collection development.

Task 2: With audience input, develop an interpretation plan that assesses existing approaches and formalizes ways to engage current and new visitors, including allocation of galleries, size and variety of exhibitions, and new digital media.

Task 3: Increase intellectual, physical, and digital accessibility to collections to meet the needs and expectations of on-site and off-site audiences.

Task 4: Develop programs in collaboration with the education community for school-based audiences that embrace twenty-first century learning skills.

Task 5: Expand programming through strategic partnerships and collaborations with target audiences, community groups, and universities.

Ewer, Shop of Isaac Hutton (1766-1855) and George Hutton (1773-1855), Albany, c.1800, silver, ht. 14 3/4" x wt. 38.5 oz. troy, Albany Institute of History & Art exchange, x.1940.482.666



Executive Summary of the Strategic Plan 2015–2018 (cont)



Strategy C: Preserve, maintain, and enhance the physical facilities and provide a stimulating environment for visitors and staff. Facilities will be optimized for occupant comfort and preservation of collections in keeping with best practices in sustainable design.

Task 1: Update assessments of existing facilities, review operations, and maintenance budgets.

Task 2: Update the capital plan and coordinate goals of the strategic plan into capital project priorities.

Task 3: Identify projects to coordinate and improve signage, wayfinding and architectural graphics.

Goal II: Create a Financially Sustainable Institution

Strategy A: Develop a coordinated institution-wide effort to develop new contributed and earned income funds to lead to stabilization.

Task 1: Realign development office and add full time staff member.

Task 2: Complete current Legacy Campaign and Match program in anticipation of launching development campaign including new endowment program.

Dutch Tile (detail), The Netherlands, c. 1620, Earthenware, tin glazed with blue (cobalt) decoration, ht. 5" x w. 5 1/4", Albany Institute of History & Art, gift of Mr. and Mrs. William Gorham Rice, 1927.5.44



Executive Summary of the Strategic Plan 2015–2018 (cont)



Task 3: Set and reach new contributed income goals utilizing American Art Museum Directors (AAMD) 2015 national benchmarks for individual and corporate contributions, foundations and trusts, special events, and government grants.

Task 4: Conduct development department-based SWOT analysis in relation to AAMD 2015 national benchmarks.

Strategy B: Develop a coordinated institution-wide effort to develop new earned income funds to lead to sustainability.

Task 1: Set new earned income goals.

Task 2: Set and reach new income goals for museum shop and merchandising.

Task 3: Set and Reach new income goals for museum café.

Task 4: Set and reach new rights and reproduction income goals.

Task 5: Set and reach new admissions income goals.

Task 6: Set and reach new membership income goals.

Task 7: Set and reach new space rental goals.

Task 8: Assess education income goals.

Flowers and Basket with Parrot and Butterflies (detail), J. F. Hefele (died c. 1710), 1688–1710, bodycolor on paper, Albany Institute of History & Art, gift of Mary Taylor Moulton Hanrahan, 1946.15.76



Executive Summary of the Strategic Plan 2015–2018 (cont)



Goal III: Create and foster a dynamic and diverse team of museum staff, board, and volunteers who will work together to achieve our strategic plan goals.

Strategy A: Provide a work environment that encourages teamwork, promotes responsible management of museum finances and human resources, acknowledges professional achievement, and advances AIHA's commitment to audience engagement.

Task 1: Review and realign organizational structure, processes, and training to foster a more nimble, interactive, and audience-focused culture.

Task 2: Improve and implement internal control policies and processes for stronger fiscal management through effective oversight of all financial operations.

Task 3: Ensure sound human resources management that supports the growth and development of employees.

Mount Merino (detail), Stanley Bate (1903–1972), c.1948, ht.20 1/2" x w.36", oil on linen, mounted on plywood, Albany Institute of History & Art, Purchase, 1948.23



Executive Summary of the Strategic Plan 2015–2018 (cont)



Strategy B: Heighten board engagement, commitment, and effectiveness by leveraging their talents, expertise, and resources to meet AIHA's guiding principle, mission, vision, and plans.

Task 1: Improve board manual to reflect board and strategic plan needs.

Task 2: Conduct annual board self-evaluation and use it to enhance preparation and effectiveness.

Task 3: Develop formal board education programs focusing on the AIHA audience experience, governance, the museum field, and the art, history, and culture of the Upper Hudson Valley.

Task 4: Cultivate new board members and create committees and task forces that offer board, other community volunteers, and staff more opportunities to work together for the betterment of AIHA.

Task 5: Develop the next generation of board leadership through succession and transition planning and by actively mentoring board members to be leaders.

Dress, 1742–43, altered ca.1840, unidentified maker; fabric designed by Anna Maria Garthwaite and woven by Mr. Pulley for Spitalfields, London, England, 1944.60.1

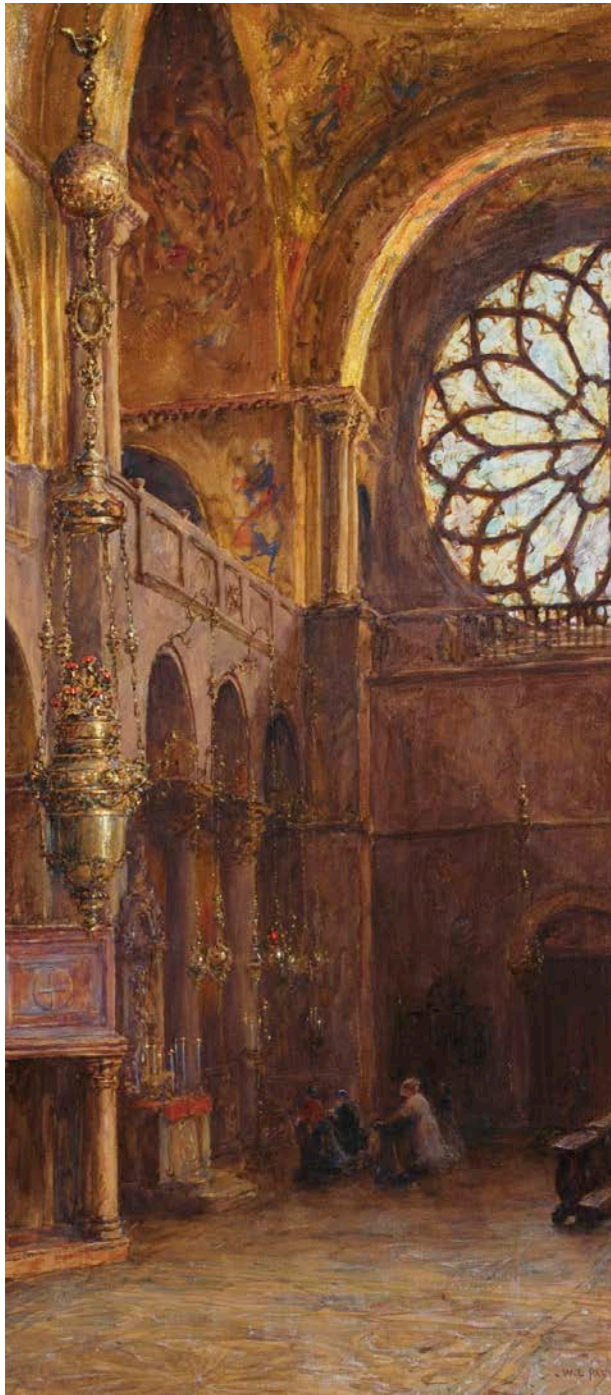
Strategic Planning Committees and Participants



2014 Board of Trustees

George R. Hearst III, *Chair*
I. David Swawite, *Vice Chair*
Barbara K. Hoehn, *Vice Chair,*
Development Chair
Darryl Teal, *Treasurer, Finance Chair*
Morgan White Whalen, *Secretary*
Jean Lewis Maloy, *Executive Committee*
Victor Oberting III, *Executive Committee,*
Collections Chair
Denise Gorman, *Nominating Chair*
Bart Trudeau, *Facilities Chair*
Susan Blabey
Deborah Groesbeck Bennett
Denise Crisafulli
Sarah Elmendorf DiStefano

Barbara Featherstonhaugh
Alan P. Goldberg
Linda Jackson-Chalmers
Susan Kambrich
Charles M. Liddle III
Robert B. Lilley, Jr.
Louise F. Marwill
Tim Nowak
John Puig
Rosemarie V. Rosen
Doug Rutnik
William F. Ryan, Jr.
Jan Smith
Peter Trimarchi
F. Michael Tucker



San Marco (detail), Walter Launt Palmer (1854–1932), 1895, oil on composition board
Albany Institute of History & Art, gift of Beatrice Palmer, 1942.34.33



Strategic Planning Committees and Participants (cont)



Associates

Phoebe Powell Bender
Charles E. Carlson
Prentiss Carnell
Karen Hartgen Fisher
Michael M. Hayes
Nancy L. Hodes
Edward Jennings
Robert J. Krackeler
Karen Nicholson
Marie D. Shore
Elizabeth A. Sonneborn
Mary Blatner Valentis, PhD
Candace K. Weir
Judy White

Ex Officio

The Honorable Kathy M. Sheehan

From Nature (detail), 1823, ink on paper, ht. 9 ¼ in., w. 7 ¾ in., Albany Institute of History & Art, gift of Edith Cole (Mrs. Howard) Silberstein, great-granddaughter of the artist, 1965.68.1

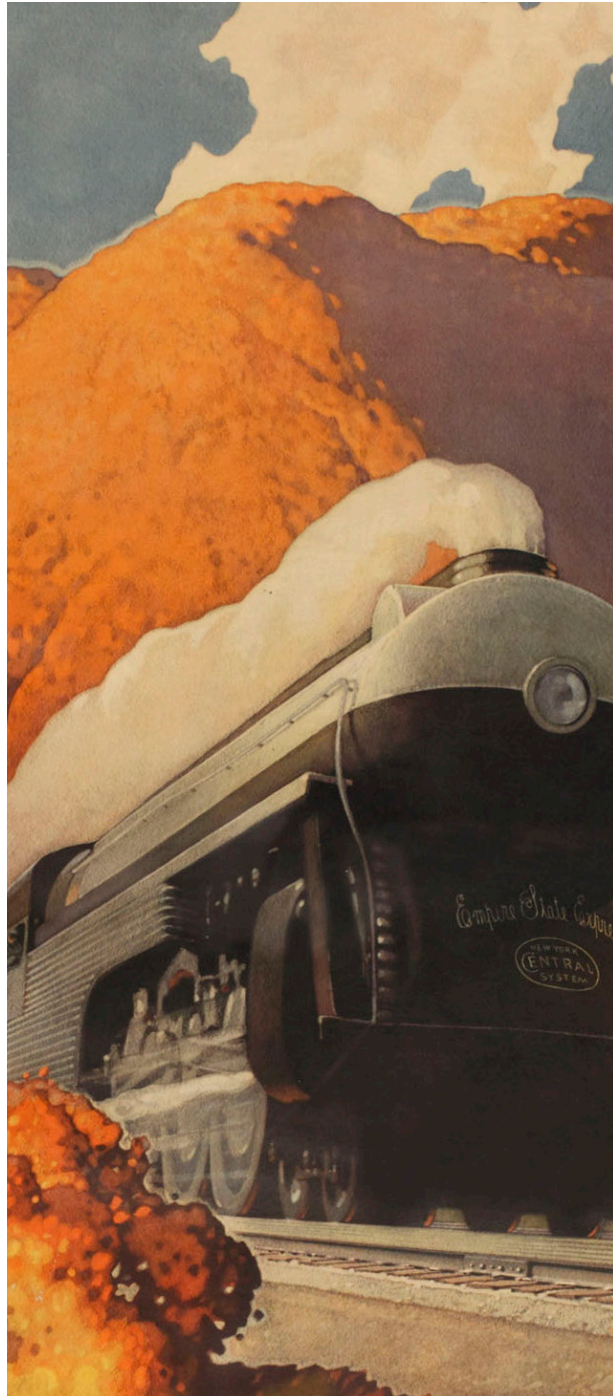
Strategic Planning Committees and Participants (cont)



AIHA Staff

Tammis K. Groft, *Executive Director*
W. Douglas McCombs PhD, *Chief Curator*
Thomas Nelson, *Exhibition Designer*
Allison Munsell, *Digitization Specialist*
Amanda Stickney, *Curatorial Assistant*
Erika Sanger, *Director of Education*
Barbara Collins, *Education Coordinator*
Sarah Clowe, *Education Program Manager*
Susan Hsu, *Director of Finance*
Scott Stewart, *Finance Assistant and Administrative Assistant*
Elizabeth Reiss, *Director of Development and Public Relations*
Nicole Peterson, *Grants Manager*
Andrew Alliger, *Membership and Development Coordinator*
Aine Leader-Nagy, *Marketing Associate*
Elizabeth Bechand, *Shop Manager*
Joseph Benassi, *Director of Facilities*
Janine Moon, *Security Officer*
Michael Ortega, *Visitor Services*
Briana Thomas, *Visitor Services*

The New Empire State Express New York Central System (detail), Leslie Ragan, 1941, photolithograph, ht. 38 1/2" x w. 24 5/8", Albany Institute of History & Art, gift of the New York Central Railroad, 1959.130.163





Strategic Planning Committees and Participants (cont)



Strategic Planning Committee

George R. Hearst III, *Chair*
I. David Swawite, *Vice Chair*
Barbara K. Hoehn, *Vice & Dev Chair*
Darryl Teal, *Treasurer, Finance Chair*
Morgan White Whalen, *Secretary*
Jean Lewis Maloy, *Executive Committee*
Victor Oberting III, *Exec. & Collections*
Denise Gorman, *Nominating Chair*
Bart Trudeau, *Facilities Chair*
Barbara Featherstonhaugh
Tammis Groft, *Executive Director*
W. Doug McCombs PhD, *Chief Curator*
Erika Sanger, *Director of Education*
Elizabeth Reiss, *Director of Development*
Susan Hsu, *Director of Finance and Administration*
Joe Benassi, *Facilities Director*

Community Participants

Jim Dickson, *educator*
Ellen Jabbur, *donor and volunteer*
Susan Keegan, *member*
Nancy Kelly, *museum professional*
Andrew Lang, *student*
Connor Lynch, *student*
Willie Marlow, *artist*
P. K. Miller, *member*

Monolith (detail), Kay Sage (1893–1963), 1937, oil on canvas, ht.36 3/8" x w.28", Albany Institute of History & Art, Gift of the estate of Kay Sage Tanguy, 1964.35

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