



# **2024-2029 Strategic Plan**

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## **Executive Summary**

In 2023, Laura Watson with the Moravian Ministries Foundation of America asked the Archives for the Moravian Church in America, Southern Province, to craft a strategic plan in support of the Capital Campaign that had been approved for the Archives at the 2022 Synod.

With the help of Assistant Archivist, Sabrina Garity, Archivist Meaghan O’Riordan conducted a SWOT Analysis to identify the strengths and weaknesses of the Archives (Appendix A). The SWOT Analysis revealed that the Archives is strong in the collections it holds, the quantity of space it has in the Archie K. Davis Center, and that the staff has a sense of urgency to create awareness around the Archives and establish access to their important and valuable resources. Their weaknesses include community awareness of the existence of the Archives and its resources, access to collections, fiscal sustainability, preservation and conservation of the collection, and staff capacity to fulfill the mission of the Archives.

In 2023, O’Riordan crafted new Mission, Vision, and Values Statements, soliciting feedback from Garity, Archives Operations Coordinator, Cindy Lamb, and the governing board of the Archives, the Moravian Archives Commission. No changes were requested.

We have identified five strategic priority areas for 2024-2029. They are fiscal sustainability, collections access, awareness, collections preservation and conservation, and staff capacity. We have also identified specific goals for each area with anticipated organizational impact and outcomes.

# Mission, Vision, and Values

## Mission

The Moravian Archives is the official repository of and serves as the institutional memory for the Moravian Church in America, Southern Province. It serves the Church, its members, and the public by fostering curiosity and discovery through access, preservation, and education.

The Archives' mission is to ethically steward records and historical materials of Moravians and provide equitable public access to its holdings. This mission is fulfilled by:

- Appraising, transferring, stabilizing, and documenting archival acquisitions;
- Offering a range of research and reference services to the public;
- Establishing policy and providing expert guidance on record-keeping practices;
- Creating and promoting products and services that broaden understanding of the history and culture of the Moravians in the Southern Province;
- Providing professional archival and preservation expertise across the Province and to the public;
- Providing adequate facilities for the retention, preservation, servicing, and research of our holdings;
- Being ethical stewards of the archival materials in our care and the history and people those materials reflect.

## Vision

The historical records of the Moravian Church in America, Southern Province, belong to the people and descendants of the Moravian Church in the Southern United States, especially in and around Winston-Salem, North Carolina. They are among the state's most important historical and cultural resources and must be properly preserved and made available to the public. Access to the Archives allows both Moravians and the local communities where they have been prominent to know of and benefit from the information found in these records. These unique and irreplaceable records are essential to understanding the history of the Moravians in North America.

## Values

Bishop Clarence H. Shawe described in a lecture series delivered at the Moravian Theological Seminary in Bethlehem, Pennsylvania, in 1977, the Spirit of the Moravian Church as having five characteristics. Those five characteristics have been transformed into the values held by the Moravian Archives:

- **Simplicity:** We value genuineness, practicality, and transparency in our descriptive practices and access policies. We hold a commitment to professional standards and ethics and a holistic approach to stewardship of collections and quality service to our users. If our only achievement is preserving our holdings

and making them accessible to the public, we will have achieved our primary goals.

- Happiness: We value the joy and pleasure that archival research and education can grant a community, especially those who have been historically marginalized. We want users of our collections to see themselves reflected and add new meaning to their lives. We seek and create new knowledge and understanding and foster creativity and innovation for the benefit of all.
- Unintrusiveness: We value openness, fairness, collaboration, and stakeholder input in operations are driven by accurate and reliable data made available to the Moravian Archives Commission and the Provincial Elders Conference.
- Fellowship: We value equitable public access and provide all users with just, fair, and timely access to archives without discrimination. When restrictions have been imposed, those restrictions apply to everyone on the same terms. When restrictions have been lifted, the restrictions are lifted for everyone. We want to create a welcoming environment for everyone.
- Service: The Moravian Archives is, at its core, an agency of the Southern Province and, therefore, a faithful servant to its congregations and affiliates. We strive to be a resource for all Moravians and a collaborative partner with other Moravian affiliated organizations, both within and outside of those reporting through the Province.

# Strategic Priorities

## Fiscal Sustainability

To allow staff to perform work at the highest possible level, to hire additional staff, and to create a secure foundation that will ensure the continued preservation of and access to historical records.

Goals:

- Sustain individual donations at \$50,000/year annually
- Expand the gift shop to bring in more revenue
- Formally launch and complete the Capital Campaign
- Initiate sales of out-of-scope books and maps in our collection
- Expand services to bring in more revenue
- Pursue all possible grant funding opportunities

Budgetary impact: Some goals will initially add to costs (e.g., expanding the gift shop) but all initiatives should increase income overall

Human impact: Significant. Each of these goals requires a significant amount of time and energy to complete, especially considering the other functions of the Archives will continue concurrently. This work cannot be done by volunteers and interns.

## Collections Access

To serve as the institutional memory for the Moravian Church in America, Southern Province, to serve the Church, its members, and the public by fostering curiosity and discovery through access, and to ethically steward records and historical materials of Moravians and provide equitable public access to the Archives' holdings.

Goals:

- Create and publish baseline finding aids for all previously processed and inventoried collections
- Complete inventory of entire book collection, cataloged and uncataloged, and create a plan for cataloging
- Establish digitization priorities and begin project digitization alongside digitization for patron requests
- Complete an assessment of the processing backlog and establish priorities for addressing those materials
- Migrate paper-based accession records to collection management system database in ArchivesSpace

Budgetary impact: Minimal

Human impact: Significant. Each of these goals requires a significant amount of time and energy to complete, especially considering the other functions of the Archives will

continue concurrently. Some of this work cannot be completed by volunteers and interns.

## **Awareness**

To increase awareness among existing and potential users of the Archives that we exist, have relevant resources to their projects and/or interests, and are here to help facilitate access to primary sources and to bring in new audiences by collaborating with other local organizations and institutions, both Moravian and non-Moravian.

Goals:

- Create opportunities for engagement with the Archives, including Vault tours, workshops, Talks at the AKD, and other events.
- Send monthly e-newsletters to our contact list and make sure to include the opportunity to sign up for the e-newsletter at all events.
- Send trimester print mailings to entire contact list and *Annotations* newsletter to our Friends of the Archives program
- Establish and promote a restructured Friends of the Archives program with tiered benefits
- Initiate social media efforts across a variety of platforms to promote the Archives, both day-to-day work and upcoming events
- Collaborate with affiliate groups, such as the Moravian Music Foundation, Old Salem, and Salem Academy & College, to bring in new audiences for both organizations.
- Collaborate with other provincial agencies and congregations to share and promote our mission to internal audiences
- Assist with creating and contributing to exhibits by loaning artifacts or sharing expertise
- Keep improving the website and make sure it stays up-to-date with current events

Budgetary impact: Minimal.

Human impact: Significant. Most of these goals requires a significant amount of time and energy to complete, especially considering the other functions of the Archives will continue concurrently. This work cannot be done by volunteers and interns.

## **Collections Preservation and Conservation**

To care for collections, to protect materials by minimizing physical deterioration and damage in order to reduce loss of the information and to extend the life of the item, to repair or stabilize items through chemical or physical treatment, and to provide adequate facilities for the preservation and conservation of our holdings.

Goals:

- Rehouse the entire archives and records collection

- Assess book collection and house or repair as needed
- House unprocessed collection material to stabilize
- Complete a space assessment to determine how much growth room is available and explore future capital improvements to expand as needed

Budgetary impact: Moderate. Acid-free boxes are not cheap, so there will be some impact on the archival supplies budget.

Human impact: Moderate. These tasks require a significant amount of time and energy to complete, but they can be done using a phased approach and with the help of volunteers and interns.

## Staff Capacity

To allow staff to perform work at the highest possible level, to avoid burnout of existing staff, and to expand staffing to better fulfill our mission and vision.

Goals:

- Establish a robust volunteer program whose labor can be relied upon to staff the Reading Room regularly and help us complete other projects in a timely manner
- Seek out motivated interns who can mostly self-direct their work once taught how to complete projects and the archival principles behind each task
- Set realistic expectations regarding services we can provide and outreach activities in which we participate and our level of contribution to those activities relative to our capacity
- Hire additional staff

Budgetary impact: Significant. It costs \$75,000/year to fund a single full-time professional employee and \$68,225/year to fund a single full-time paraprofessional employee. We need a staff of at least 5.0 FTE that includes four professional archivists and two paraprofessional roles including:

1. Director (Meaghan O’Riordan)
2. Associate Director (Sabrina Garity)
3. Collections Care Archivist
4. Research Services Archivist
5. Archives Operations Coordinator (part-time) (Cindy Lamb)
6. Receptionist (shared with Moravian Music Foundation).

Human impact: Significant. Managing volunteers and interns requires a significant amount of time and energy, and they are not a sustainable solution to replacing critical staffing positions. Without hiring additional staff, we will have to be able to say, “No,” more frequently when asked to fulfill key parts of our mission, including offering a range of research and reference services to the public.



## Appendix A: SWOT Analysis

### Strengths:

- Quality and quantity of holdings
- Quantity of space for staff and holdings in the Archie K. Davis Center
- Staff's sense of urgency to create awareness around the Archives and establish access to their important and valuable resources

### Weaknesses:

- Access to holdings
- Awareness of the Archives and its holdings
- Preservation and conservation of collections
- Fiscal sustainability

### Opportunities:

- Capital Campaign
- Grants
- Internship Program
- Volunteer Program
- Social Media

### Threats:

- Staff capacity to perform the work
- Communication with administrative units
- Quality of the space without significant updates since 2001
- Community involvement