

The Friends of the Shakers



Long Range Strategic Plan

2014 - 2017

A Request from The Friends of the Shakers

Long Range Strategic Planning Committee

To: Members of The Friends of the Shakers

Re: Development of the Strategic Plan

Date: August 9, 2014

There comes a time in both personal and organizational life when there is a clear and recognized need to make a significant change in how things are being done in order to meet changing circumstances. Such a time has come to The Friends of the Shakers of Sabbathday Lake Shaker Village. The spiritual effects and beauty of our beloved Village remain unchanged but the needs of the Shaker Society and the United Society of Shakers have, indeed, changed in recent years. As the primary membership supporting organization we must identify, in concert with the Village, the ways and means for The Friends of the Shakers to best meet these needs.

Following discussions at the fall Friends' Board meeting, a decision was made to develop a Long Range Strategic Plan to assess how we can best provide greater assistance. A planning committee was created which includes members of The Friends, The Family and the Museum Director. Our first meeting was held in cold and snowy February and now, six months later, after much discussion, debate, controversy, and some good humor, the committee has completed this strategic plan. The committee had the benefit of input from an Advisory Group (some 20 members of The Friends of the Shakers) and 100 other members who were invited to respond to a survey of what they felt were important aspects of The Friends' organization.

As we know, there are fewer Shakers and there is less staff available to do much of the work of the Village. The Friends of the Shakers remain a fairly sizable entity and has many members who have the desire and ability to do more to support the Village. It is also realized by many that for The Friends of the Shakers to continue as a viable organization in the Twenty-first century, we too, must evolve into a more active and productive group of people. The two annual work days are not adequate to meet the needs of the Village and, in our sense, not enough to make membership as meaningful as it should and must be for many.

As you read through this plan, you will see how we did an in-depth assessment of our organization as to who and what we are and then spelled out the ways we can and must change to be more effective and productive in the future. We need you to find areas where you can be more involved and supportive. It is an exciting challenge for us and one that we believe will

have significant and lasting results. The committee is pleased with what has been accomplished and we need and welcome your support as we move forward.

Statements of Support from:

The President ... We each value our unique relationship with the Sabbathday Lake Shaker Community. This personal significance is why we became members of Friends. Just as when The Friends of the Shakers was founded, some saw a need to increase the positive effect Friends can have on the future of Sabbathday Lake. That was the impetus for Strategic Planning. This resulting booklet provides a roadmap we can use to move the process along. I appreciate the guidance of our leaders and the energy of those who have helped create this document. Let's continue the journey together.

Cheryl Kline

The Family ... The Shaker Community is pleased to endorse the Long Term Strategic Planning Committee's report. It represents a great deal of thought, discussion, and planning.

We pray through its vision we will guide The Friends of the Shakers to greater growth, stability and longevity. We are committed to carrying out our part to make it so!

Peace,

The Sabbathday Lake Shakers

Brother Arnold Hadd for the Family

The Director of the United Society of Shakers ... On behalf of the *United Society of Shakers*, I express my deepest gratitude to *The Friends of the Shakers'* Strategic Planning Committee, the Advisory Group, and the constituents for their careful attention to the creation of this long-range strategic plan. I believe that it is among the most lasting ways to honor the 40th anniversary of *The Friends of the Shakers*. This plan builds framework, defines direction, and establishes goals that will help *The Friends of the Shakers* organization best-achieve its future mission of supporting the evolving needs of Sabbathday Lake Shaker Village. Equally important, this plan provides *The Friends of the Shakers* organization with beneficial opportunities to sustain consistency, direction and measurable progress. It stimulates growth, improves the quality of *The Friends'* experience, and ensures longevity of *The Friends of the Shakers* by developing membership, and increasing opportunities for volunteerism, education, and fundraising. I fully support this plan in its ability to increase the viability of *The Friends of the Shakers*, and to strengthen the collaboration between *The Friends of the Shakers*, the *Shaker Society*, and the *United Society of Shakers* (Shaker Museum, Shaker Library, and Herb Department). I also keenly recognize that this plan is a "call to action" to everyone, which MUST be fueled and actualized by regular participation, strong commitment, and active leadership. The *United Society of Shakers* stands ready to assist *The Friends of the Shakers* with the implementation and execution of this plan.

**The Friends of the Shakers
Long Range Strategic Plan**

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The Friends of the Shakers

Long Range Strategic Plan

Vision

The Friends of the Shakers shall be the lead membership organization sustaining Sabbathday Lake Shaker Village.

Mission

Through the dedication of time, talent and treasure, The Friends of the Shakers will support the life and future of Sabbathday Lake Shaker Village by:

- Providing financial assistance;
- Building and sustaining a well governed, active membership;
- Communicating internally and publicly in an effective, honest and open manner;
- Assisting the Shaker Society and the United Society of Shakers to carry out their functions.

Statement of Beliefs

As a supportive organization, with guidance from the governing bodies of Sabbathday Lake Shaker Village, we believe in:

helping to sustain the Shaker Community and the various entities of Shaker Village;

offering programs, fundraising opportunities and acts of service for the Village;

achieving constructive results for the betterment of the Village;

giving time, talent and treasure to the Village.

As members of The Friends of the Shakers, we believe we may gain personal growth and inspiration from:

drawing on the spiritual aspects of the Shaker faith;
preserving a profound religious movement unique in American
history;
forming rich and deep friendships ;
creating educational opportunities.

We also believe that we must:

ensure that membership is open to all and that all are made
welcome;
make membership a priority in the nearby area;
be true and loyal friends who constructively and appropriately
support all aspects of Shaker Village;
respect the privacy of the Shaker Family;
define appropriate access of our members to Shaker Village;
remember that we are guests at Shaker Village.

Through our core beliefs, continuous support of Shaker Village, and educational outreach, we believe that the members of The Friends of the Shakers historically have made positive contributions to Shaker Village and will continue to do so into the future.

Goals

Governance:

To achieve an effective and efficient set of by-laws, procedures and practices that will ensure the implementation of the mission of The Friends of the Shakers.

Membership:

To achieve a growing membership that will fully appreciate the legacy of Shaker Village and offer support in diverse ways.

Support:

To increase monetary and physical resources, along with member participation, in order to preserve the history, spiritual values, buildings and grounds of Shaker Village.

Education:

To create and implement procedures that will ensure that members are well versed in the history of Sabbathday Lake Shaker Village.

Action Plan 1

Goal: **Governance**

To achieve an effective and efficient set of by-laws, procedures and practices that will ensure the implementation of the mission of The Friends of the Shakers.

We will implement the following sub-goals:

- review and revise Board membership criteria, responsibilities and job descriptions;
- review and revise the By-laws of The Friends of the Shakers;
- create a committee to organize, monitor and evaluate The Friends of the Shakers' events and projects;
- establish an oversight committee that will meet on a regular basis to monitor and assess the implementation of the Strategic Plan;
- develop and institute means to inform members about Sabbathday Lake Shaker Village and what is expected when they are visiting.

Action Plan 2

Goal: **Membership**

To achieve a growing membership that will fully appreciate the legacy of Shaker Village and offer support in diverse ways.

We will implement the following sub-goals:

- devise membership strategies that focus on target groups such as residents of the local area, those who possess relevant talents and age specific groupings;
- develop and implement strategies to welcome new members and ensure their continued and active involvement in The Friends of the Shakers;
- expand and implement media methods to attract, educate, inform and retain members' interest and support;
- create and implement procedures that emphasize the importance and value of members attending events sponsored by The Friends of the Shakers and by Shaker Village.

Action Plan 3

Goal: **Support**

To increase monetary and physical resources, along with member participation, in order to preserve the history, spiritual values, buildings and grounds of Shaker Village.

We will implement the following sub-goals:

- establish and implement methods to involve, routinely, area members to prepare for The Friends of the Shakers' events at Shaker Village;
- create member profiles reflecting skill sets and particular interests;
- develop, with the United Society of Shakers, and implement an annual Friends of the Shakers' monetary gift specific campaign and a half-decade capital campaign;
- develop, with the Shaker Family and the United Society of Shakers, ways to support historical preservation of Shaker Village;
- develop and implement work support opportunities beyond the two work days.

Action Plan 4

Goal: Education

To create and implement procedures that will ensure that members are well versed in the history of Sabbathday Lake Shaker Village.

We will implement the following sub-goals:

- develop, with the United Society of Shakers, means to educate the membership on the history of Shaker Village;
- create and implement, with the United Society of Shakers, programs that are academic and discovery-based in order to attract new members and further educate current members;
- develop and implement protocols for supporting the United Society of Shakers' responsibility to educate people on Shaker heritage;
- support the United Society of Shakers in its outreach programs to educational institutions;
- develop and implement a Shaker Studies program for adults.

Definitions

The Friends of the Shakers: This is a non-profit corporation, 501(c)(3), that supports Sabbathday Lake Shaker Village including all of its components. It is led by its Officers and a Board of Directors.

United Society of Shakers: This is a non-profit corporation, 501(c)(3), that includes the Library, the Museum, the Herb Department and its products. The Leader of the Community is the President of the USS; the Director is responsible for the Museum, the Library and the Herb Department.

The Shaker Society: The Shaker Society is a religious community formed in 1783 and Sabbathday Lake is the only functioning Shaker Society in existence today.

Work Days: Two work days are held each year, one in May and the other in October, to do various tasks in the Village. Normally 30-60 members of The Friends of the Shakers participate in each workday.

The Clarion: This is the newsletter of The Friends of the Shakers. Four issues are currently mailed to members of The Friends of the Shakers each year.

Strategic Plan: The Long Range Strategic Plan is a specific outline of what will be accomplished during a period of 3 to 5 years in order to make the organization more productive in its mission.

Parts of the Strategic Plan: The Strategic Plan is composed of several parts all working in unison to ensure that the philosophy of the organization is implemented. These parts are:

- **Philosophy:** This consists of a Vision Statement, a Mission Statement and a Statement of Core Beliefs, all of which underlies and drives the organization.
- **Vision Statement:** This is a far reaching, inspirational statement of what we hope to accomplish over a period of time.

- **Mission Statement:** This is a statement that includes two parts: it states what we are going to do and how we are going to do it.
- **Statement of Beliefs:** This is a statement of the fundamental, core values that define who we are as an organization.
- **Goals:** These are major statements that address and focus on the areas necessary for the implementation of the philosophy.
- **Action Plans:** Each major goal has a specific plan to ensure its implementation. The action plan includes a statement of the goal and a list of clearly defined sub-goals that outline the steps necessary to accomplish the goal.
- **Implementation Plan:** After the Strategic Plan is developed, an implementation Plan is created. This covers a period of several years; in this Plan we will focus on tasks to be accomplished in the first three years. The Implementation Plan takes each sub-goal and defines specific actions to be done. Each action will have a time-line for completion and the person(s) responsible for seeing that it is accomplished. During quarterly reviews the current state of implementation will be assessed.

Please note: The Friend overseeing the action step is not necessarily the one doing the work of implementing it. We are requesting that groups of people become involved in the actual implementation.

How can I help, you ask??

Get involved in the implementation of the Plan!!

Implementation Itinerary

2014-2017

- In September the Strategic Planning Committee will meet to prepare the Implementation Plan **and you can be an integral part of this Plan.**
- **As a first step in this phase, we ask that if you are interested in working on a Goal or any specific Sub-goal that you let a committee member know. It is critical to the process that you become involved; in many cases distance from the Village should not be a barrier. We need your help to make the plan work!**
- The formal process for implementing the Plan will be to develop action steps for each of the sub-goals that are expected to be completed within 3-5 years. Spreadsheets will be written to include a statement of the major Goal followed by a listing of each of its Sub-goals. Each Sub-goal will be followed by a series of action steps, the name of the Friend(s) responsible for each step's implementation and the projected date of completion.

- Specific directions and support will be provided to all Friends of the Shakers involved with the implementation of the plan.
- The time frames for this part of implementation will range from 2014 to 2017, but some time frames may need to be extended. This is a 3-5 year plan—all the action steps cannot occur during the first year; in fact, the first year will be carefully orchestrated to allow people to become accustomed to the process. The plan will be reviewed and updated on a regular basis and adjusted as needed. This is a dynamic, ongoing document and one that, if implemented correctly, will prove to be an asset to The Friends of the Shakers and Shaker Village going forward.

Enormous thanks go to ...

Members of the Strategic Planning Committee: Sr. Frances Carr, Brother Arnold Hadd, Michael Graham, Leonard Brooks, Cherie Kline, Jamie Ribisi-Braley, Elizabeth Stover, Dea Logan, Erin Dulac, Joe Rogers, Matt Laney, Wendy Thoren, Kathy Moriarity and Co-Chairs Nancy George and Mary Larnard.

Active Members of the Advisory Group: Elaine Disch, Flo Morse, Steve Paterwic, Robert Boggs, Mary Ann Haagen, Ken and Marylou Averill, Jim Gelbort, Chris Coyle, Chris Pera, Lloyd and Sue Hunt, Alan and Kathy Gregory, Chris Becksvoort, Debbie McBride, Kyle Allen, Lois Fletcher, Candice Walworth, Dolores Broberg and Stefan Adams.

Members of The Friends of the Shakers who responded to the survey.