

The Berry & District Historical Society Inc

ABN 40 879 965 343

Strategic Plan

2018-2023



Berry Museum, 135 Queen St Berry NSW



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Revised 8th April 2019

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Introduction

This Strategic Plan for 2018-2023 is an important document for the Berry & District Historical Society for the present and into the future. It allows the Society to express its needs and wants for the next five years and will provide guidance and direction to our members and volunteers as they implement the various projects and activities outlined in this plan.

The Strategic Plan 2018 -2023 replaces the B & DHS Management Plan of 2016. For several reasons there was a need for the Society's Management Committee to revisit its policy and planning documents and to redesign and review our Constitution and Management Plan.

The Historical Society's Constitution was no longer consistent with current legislative requirements under the Associations Act and consequently needed to be redrafted. In the process of doing this it was necessary to draft a set of objects for the Society, objects which should be reflected in the Mission and Aims of a new Strategic Plan.

The other reasons for rewriting our planning document are that, while our obligation to care for and conserve the many documents, images, artefacts and indeed our heritage-listed building itself, has not changed, new needs and opportunities have emerged with respect to the management of the Berry Museum and the services we provide through the Society.

Additionally, the design of the old management plan no longer reflects current best practice for volunteer museums and after advice from Museums & Galleries NSW (M&GNSW) and an advisor, Ms. Margot Jolley, engaged by Shoalhaven City Council, the Society's Management Committee determined that a rewrite of our key planning document should be undertaken.

Our previous Management Plan 2016 -18 covered a two year time frame but if we are to achieve our new strategic priorities, we need a document with a five year time frame.

This Strategic Plan obliges the Society to undertake an annual review of our achievements and progress.

One of the important needs identified by the Society's Management Committee was that we lacked policy documents in the key areas of collection management and research. These documents have been drafted and are currently in implementation.

Our membership has undergone a generational change and many members are unfamiliar with the detail of our collection and find it difficult to locate documents and objects within the museum when undertaking research or mounting displays. This is complicated by the fact that our cataloguing system is a mixture of cards and paper with some digital entries and should be brought up to date with the information age.

During the last few years, the Management Committee has focussed on improving the profile of the Historical Society. By publicising our activities more effectively, both through our own publications and website and community publications and sites, we seek to make ourselves more visible. Under this plan we are also committing to improving the appearance of the Museum building and grounds and also our fixed and mobile signage. It is through actions such as these that we can increase both our membership and visitor numbers.

While our financial management has been sound and the Society sustains a healthy financial position for an institution of its size, we need to strengthen our capacity to meet the expenses incurred to achieve the priorities listed in this Strategic Plan. This means that members need to engage in various fund raising activities.

The Museum and Society will continue to work with Shoalhaven City Council to strengthen networks, seek and respond to training opportunities for our volunteer members and advise Council on heritage issues in the town and district.

Vision

To ensure that the heritage and history of Berry and District are preserved for the future in one of Berry's most historic buildings.

Mission

We aim to provide an engaging and secure place where Berry and district history and stories are collected, conserved, interpreted and presented for the community. The Berry & District Historical Society Inc. manages the Berry Museum Collection in trust for the present and the future.

Aims

- To collect, conserve, store and display articles relating to the history of Berry
- To research historical aspects of the area
- To disperse and promote information on the history of the Berry District
- To advocate for the preservation of objects and sites of historic interest
- To continuously evaluate and review the Society's Objectives, Strategies and Programs.

Background and Context for the Strategic Plan

The history of the Berry Museum and the Berry & District Historical Society began in May 1969 when Shoalhaven City Council wrote to the Berry Chamber of Commerce asking for suggestions for a Berry program for the Captain Cook Celebrations. The Council also requested that the town nominate a representative to the Shoalhaven Committee. The representative was the late Mary Lidbetter who suggested that the town mount history themed shop window displays and that citizens dress in costumes of the late nineteenth century.

The celebratory activities were a great success, attracting visitors from far and wide. Afterwards local people requested that some of the display items be kept and displayed permanently.

The Berry Chamber of Commerce called a public meeting to discuss this proposal. This was well attended, and the Berry Museum was formed. Lance Sewell, the local pharmacist, gave rooms at the side of his chemist shop and the committee made stands, prepared displays and printed signs at their own expense. The Berry Museum opened on the October long weekend 1970.

As a result of the interest in the written history of the area, the Committee asked the beneficiary of the Tilghman library, Moore Theological College, if they would be prepared to donate those papers that dealt with the Berry District to our Museum. This was given through Mrs D C Tilghman. The town now had a collection of historical objects and significant papers, so an organisation was needed to manage and care for this collection; thus it was decided to form The Berry & District Historical Society.

In 1972, the ANZ Bank closed its branch at 135 Queen Street, Berry, and the Society applied to the Shoalhaven City Council for the use of the three rooms in the banking section of the building. The Museum opened in these rooms in October 1975. In 1978, the Museum obtained full use of the building, including what was originally the bank manager's residence and the grounds.

From the beginning, local people have staffed the Museum and supported it through active membership of The Berry & District Historical Society.

The Society has struggled financially but has continued through the work and financial assistance of its members, and grants from the community, and state and local government. Large grants and bequests to the society are used for specific purposes.

The Berry & District Historical Society Inc is an incorporated body which includes a management committee for the Berry Museum. The incorporated organisation meets monthly as a committee to report on and oversee progress of the strategies and actions within our planning documents and to manage the conduct of the historical society and museum business.

The organisation consists of a President, Vice President, Secretary, Treasurer, Public Officer and Committee members.

Working groups are formed as needed to achieve our aims and strategic priorities through a series of projects and actions.

Currently project and working group areas and responsibilities are as follows:

- **Membership**
Membership Lists, Roster, Catering, Training
- **Sales And Promotions**
Chronograph, Tours, Publicity, Books, Souvenirs
- **Displays**
Mounting new occasional displays and assisting community groups with special displays, improving permanent displays
- **Research**
Coordination and management of requests, family history, Comment Book, Berry Papers, oral history

- **Collection management**
Accession, Information Systems, Conservation
- **Maintenance**
Garden, Building, Furniture, Fittings
- **Occupational Health and Safety**

We welcome new members In addition to the rostered members, whose role is to meet and greet visitors to the Museum, we encourage members to get involved in a wide range of activities. We also encourage members to develop new interests and skills.

Our membership application form provides a checklist of the types of activities that members can engage in:

Collection Team

- Information Systems: Computer
- Information Systems: Clerical
- Information Systems: Website
- Accessioning/De-accessioning
- Preserving Paper/Books
- Preserving Material/Clothes
- Preserving Wooden Items
- Preserving Metal Items
- Preserving Leather Items

Maintenance Team

- Maintaining Building/ Furnishings
- Maintaining Gardens

Museum Team

- Staffing Front Desk
- Conducting Tours
- Planning Education Programs
- Selling Books and Souvenirs
- Organising Publicity
- Membership Management and Support
- Catering events and functions

Research Team

- Researching Family History
- Researching History

Display Team

- Mounting Displays and Exhibitions

In planning for the future, there has been discussion regarding extending our exhibition and storage space. The building at the rear of the Museum is currently occupied by the Rural Fire Service but plans are afoot to move the RFS to other premises. The Society has approached State and local government representatives to allow the Historical Society to occupy this building. There are a number of financial issues to be resolved before this additional space can be acquired.

Key Strategic Priorities

- Implement revised management, policy and planning documents
- Review and upgrade information and collection management systems and practices
- Revitalise membership base and increase volunteer numbers
- Identify new sources of funding, including grants and improved marketing, to support museum activities
- Maintain, extend and improve existing structures and grounds.
- Further develop our public profile through education program activities with community groups and schools
- Improve our research capacity and output
- Respond to heritage preservation issues particularly as they arise from development intensification within the town

Strategies and Projects

Management and Planning

- Implementation of the Society's new Constitution
- Development and adoption of a Collection Management Policy and Plan. Include a deaccessioning section.
- Development and adoption of a Research Management Policy and Plan
- Revisit the Strategic Plan yearly to evaluate the progress and success of the goals and projects planned at the September Committee meeting

Collection Management

- Draft a Collection Management Policy
- Establish a working group to guide implementation of our Collection Management Plan (see Appendix)
- Progress digital data recording of books in the collection, cataloguing and re-presenting copies in archival quality protective coverings (ongoing)
- Rehouse and apply protective enclosures for all books and newspapers (ongoing).
- Conserve selected photographs from the collection by digital recording, data base development, cataloguing, indexing, filing in CD format
- Place charges and summonses records on a data base in CD format
- De-accession objects not relevant to the Berry district within 5 years
- Continue the textile reparation project working on the cleaning, repair, renewal or replacement of fabric pieces in the collection
- Undertake maintenance of the flood boat in accordance with the Conservation Management Plan.
- Provide curatorial support for a new display of the dendrochronological sample from the famous "Bum Tree".

Membership and Volunteer Development

- Implement a volunteer welcome and orientation procedure
- At the September Committee meeting, identify volunteer development and support activities for the coming year
- Provide training and procedures for volunteers in the following:
 - OH&S Guidelines
 - Evacuation Policy
 - Code of Conduct
 - Emergencies
 - Role Description
 - Hospitality
 - Attendance Registration.
- Advise volunteers of new information and policies in the Volunteer Information Folder as they occur
- Organise a social night or Christmas party for members each year
- Organise and distribute of the bi-monthly members newsletter – ‘The Chronograph’
- Organise two excursions for members per year
- Facilitate and fund attendance at two conferences for volunteer staff
- Organise regular working bees in different aspects of museum work to help educate members in these areas.
- Hold four talks on local history matters for members each year at the Museum

Funding and Financial Management

- Apply for appropriate grants as they become available.
- Develop an annual marketing plan and budget which includes the following marketing activities
 - Brochures
 - Mobile display
 - Media
 - Written articles / stories
 - Signage
 - Advertising
 - Flyers to promote tours.
 - Support community and business initiatives where they assist us in fund raising such as the Berry Hotel trivia nights.
- Develop and submit an ongoing operational forecast budget and include the following items:
 - New display spaces and equipment

- Mowing and yard maintenance
- Consumables estimate ie:
 - > Paper
 - > printer inks
 - > CDs
 - > Cleaning
 - > Cleaning products
 - > Tea and coffee
 - > Power
 - > Replacements
 - > Security
 - > Fire alarm
 - > Travel
 - > Phone
 - > Rentals
 - > Insurance
 - > Fire extinguishers
 - > IT software and hardware
 - > marketing expenses

Improvement and Maintenance of Building and Grounds

- Renew the lease with Shoalhaven City Council (SCC)
- Development of an annual priority list of maintenance projects
- Stage 2 Landscape Project - complete eastern side garden. This project has been modified due to the presence of the original stonework removed from the roof of the building as part of its refurbishment by Shoalhaven Council. (project in train)
- Implement new garden design using the 19th century stonework as part of the garden. (designs completed)
- Apply 2017 Berry Garden Club grant funding to implement revised garden design incorporating stonework
- Provide a new town map for display outside the Berry Museum
- Complete upgrade of back rooms to house and display our collection of tools
- Monitor technology needs of the Museum and apply for grants to fund upgrades, and purchase of new equipment, where appropriate
- Complete upgrade of display boards.
- Consult SCC on the Council Cyclical Maintenance program upgrade to determine responsibility for specific repairs and improvements and a timetable for completion.
 - External brickwork - removal of paint
 - Back door - frame repair
 - Down pipe repairs.

Education and Community Liaison

- Prepare guidelines for community exhibition contributors
- Establish an oral history support group to assist new volunteers in the gathering of oral history information
- Publish regular articles monthly in the *Town Crier*
- Hold a public lecture once or twice a year for members and interested public, and work with the Berry Conversations group to hold an additional public lecture
- Continue to develop tour programs to include school groups, local clubs and tour bus groups
- Revise and update the Museum website
- Post items of local historical interest on the museum website Exhibition Program
- Mount two new displays per year of Travelling Exhibitions and/or Community Group Displays
- Support the Historic Houses Trust local research projects
- Continue to support CANN Museum's Australia Collection on Line
- [Participate in MGNSW Standards Program in 2019](#)
- Assist local community groups for displays, mutual support and joint ventures
- Support the Shoalhaven Museums and Galleries Breakfast Program and volunteer development activities
- Continue to take part in Shoalhaven Family and Local History Fair
- Continue to participate in National Trust Festival, Women's Month, National Family History Week, RAHS events
- Support historically relevant events and celebrations undertaken in conjunction with other local history organisations.
- Set up Berry Museum display at Berry Show, Shoalhaven History Fair, Heritage Weeks and other promotional events including those organised by other SMART members
- Update Berry Museum website and links to Berry Alliance, Berry Chamber of Commerce, Berry Forum and Council
- Continue to improve *The Chronograph* and to contribute on a regular basis to the *Town Crier*
- Prepare and market new tourist information for visitors to Berry including a Guide to the Museum
- Cooperate with Shoalhaven Tourism to meet their information needs, as relevant

Research

- Improve our research services to visitors and community
- Develop and adopt a research management plan.
- Undertake, complete and publish new research projects

Heritage Preservation

- Monitor developments in relation to Berry Station Master's residence issue
- Collaborate with the Berry Forum and other relevant community action groups to ensure that development projects are sensitive to the heritage character of the town.

Appendix

Volunteers Information

Information to assist desk volunteers and those undertaking other work at the Museum is held in the black folder *Advice for Volunteers* which is kept on the front desk. This advice includes the following topics:

1. Tasks of Volunteers
2. Opening and Closing Procedure
3. Volunteer Attendance Book
4. Visitor Welcome and Site Plan
5. Volunteer Induction and Training
6. Emergency Evacuation
7. Emergency Volunteer Contact List
8. Emergency Contact List
9. Personal Threat to Volunteer Staff
10. Access and Supporting those with Disabilities
11. Chemicals – Use and Storage
12. Code of Conduct
13. First Aid
14. Lifting Procedure
15. Ladders and Climbing
16. Accident and Incident Report
17. Cleaning Safety Aspects
18. Fire Extinguishers
19. Electrical Tagging
20. Audit Checks
21. The OH&S Manual.

Draft Collection Management Plan

Aims:

- To improve the accessibility of the documents and objects to researchers and display makers
- To improve our capacity to conserve and maintain items in our collection
- To upgrade our accessioning system to create a reliable catalogue
- To train our researchers, accessioners and other collection users in the upgraded systems.

Strategies

1. Reform the accessioning record by adding new fields:
 - Room number (as in our new Museum Guide)
 - Item type i.e. 1.Book , 2.Object (e.g picture, pottery, map) 3. Location in the room i.e. wm (wall mounted) or bs (book shelf)
 - In the case of the Library cupboards give a shelf number

These designations will provide us with a **code** for each item which will need to be entered onto the accession record. This record then becomes a collection inventory.

2. Develop a more accurate catalogue of our document collection (i.e. library)
 - enrich folder labelling
 - include folders on accession record
 - undertake paper preservation of paper records
 - prepare subject categories for items within folders
 - rewrite folder titles and labels
 - ensure each folder is accessioned with folder location included on the accession record and on the spine of the folder.
3. Prioritise preservation of those documents at risk of deterioration.
4. Continue to monitor the newly installed damp management system.

Timeframe

1. Adjustment of accessioning system - July 2018 - March 2021
2. Identification of at risk documents and replace storage arrangements (preservation folders) - December 2018 - June 2019
3. Establish teams to undertake codification of each object in each room - October 2018.
4. Undertake codification of entire collection and record codings in accessioning system - October 2018 - March 2022
5. Train our researchers and accessioners in the new systems - ongoing.

Chris Currey
June 2018

Draft Research Policy and Procedures

Aims of this policy

The purpose of this policy is to guide members of the B&DHS and our researchers in particular as they provide research services to our visitors and community.

The policy aims to support the timeliness, effectiveness and quality of the research we provide.

It sets out a costing framework and a method for distributing and monitoring the progress and completion of each research task.

It also provides advice on liaising and consulting with our research customers.

The policy outlines the roles and responsibilities of various groups of volunteers within the the Society.

It is important that the B&DHS has a research policy and implements this policy effectively. Because we charge people for doing research for them we have obligations under NSW Government Fair Trading Legislation. If we accept payment for research and for whatever reason fail to deliver that research we may be subject to customer complaint and called to account by the Department of Fair Trading. The persons responsible in such an instance would be the President, Vice-President and Treasurer.

This policy replaces the Research Procedure policy of 2012 and the revised procedure of 2016.

What kinds of research do we do?

Most requests we receive are for information about family history. There are also a range of areas where we need to undertake research either for our own purposes such as the mounting of a display or the production of a publication or to fulfil a request from an outside organisation or individual. These areas include:

- local social history,
- heritage and architectural research, e.g. historic buildings, cemeteries, objects held by the museum
- local industries,
- history of local government and other social institutions such as hospitals, churches, lodges and sporting clubs,
- history of major events as they impacted the Berry community and locality, for example, land reforms, suffrage, wars, Federation or referenda.

We do not do research on people, places and events which have no connection to Berry and district. Neither do we undertake research which requires investigation of areas of knowledge and information outside of the conventional sources such as local libraries, local council archives, Land Titles Office and BDM or beyond the information sources held by Berry Museum.

We do not provide research into matters of current private land ownership. This area is more properly covered by professionals such as conveyancers and planning consultancies. We can sometimes provide advice on the **history** of certain sites and holdings but we cannot enter into matters of detail with respect to the current private ownership of such properties.

What is our commitment to our customers?

Our commitment to our customers and community is to provide relevant, timely, responsive and complete historical information in response to their reasonable requests.

We are also committed to consult with and inform research clients as to the progress of their requests and where possible to involve them in the research process.

We also respect the privacy and confidentiality requirements of our research customers.

All research requests to the Historical Society must be presented in writing either by email or on one of our paper forms. We cannot guarantee the accuracy of any research information that we do not provide in writing. In other words we do not respond to requests made during Museum opening hours or over the telephone. We discourage our desk volunteers from answering questions requiring research from Museum visitors during opening hours.

What do we charge?

We charge \$30.00 for an initial investigation and a short form report. Further research into that or a related topic is charged at \$15.00 per hour up to 10 hours.

Corporate customers such as local businesses, government agencies or big companies such as Fulton Hogan will be charged the initial fee even when a search does not uncover any information. Individuals will not be charged if we find we have no information relating to their request.

Students and not for profit community organisations will not be charged and neither will entities possessing information which we do not have and which they are prepared to share with us. An information sharing or exchange removes the fee obligation.

Receipts must be issued for each payment even if the customer refuses the receipt. If the requester pays by direct deposit this should be noted on the request form or on the electronic log. Museum volunteers must have access to evidence that payment has been received so that they can respond to enquiries about the progress of any research request.

If no fee is being charged this should be noted on the request form or in the electronic log.

Research reports will not be issued to customers who have not paid unless the request form indicates that the fee has been waived.

How do we track and monitor research requests?

Research requests that are received during opening hours or by post should be placed in the white folder marked research on the front desk.

Requests received by email are to be copied and placed in the research folder.

Each research request is to be logged on the computer by the research coordinator and allocated to a researcher. The research log will contain:

- date received,
- the name of the requester with contact detail (either an email address or phone number),
- topic of the research,
- the name of the researcher,
- mode of payment or fee waived,
- date completed.

The Research Coordinator will monitor progress of each request by contacting each researcher with an active request one month after the request has been allocated.

Research requesters who have paid a fee or for whom a fee has been waived will be advised of progress by the Research Coordinator each month. People who have not paid need not be notified.

If the request has been marked “urgent” the coordinator may need to follow up with the researcher over a shorter time-frame. Circumstances such as:

- an impending visit by an out of town client
- research is required to meet the needs of a Council Meeting or Berry Forum Meeting,
- might require completion of the task over a shorter time-frame.

Once completed each piece of research will be forwarded by the researcher to the client. Researchers should ask each client if the Museum can retain a copy of the research for our files.

Copies of completed research should be placed in the in-tray marked Museum Librarian.

The request form should be returned to the research coordinator marked completed.

What resources do we have available for our researchers and how do we maintain and manage these resources?

The Museum has an extensive collection of documents including:

- family history files kept in alphabetical hanging folders,
- cemetery records
- books on local history,
- newspapers and journals
- maps and charts
- meeting records
- photographs available on the museum computer or in folders,
- an accessions system with information about all documents and objects kept in the museum and
- a microfilm collection of documents.

We also have a small group of experienced researchers who can help new researchers in the location of information and in the use of research tools such as Trove, [ancestry.com](https://www.ancestry.com), Births Deaths and Marriages and Land Titles searching.

No piece of research information is to be removed from the museum unless it is recorded in the borrowing book kept in the box file on the front desk. Borrowed books or files or microfilms should be returned to the Museum Librarian’s tray for re filing.

No piece of research information whether in the form of a file or part of a file, book, photograph or object is to be given to members of the general public. Copies of documents and photographs can be provided for a fee but all original material must be retained in the Museum.

Members of the public are not permitted to undertake their own research using the collection of the Berry Museum. People who want to undertake their own research can only do so in consultation with and under the supervision of a member of the research team.

Roles and responsibilities

The **Research Coordinator** will:

- allocate research items to researcher team members
- liaise between researchers and research applicants
- monitor the time spent and cost of the research
- check with researcher as to progress of research
- ensure that the research folder of request forms is kept up to date
- attach the receipts or other evidence of payment to each research form
- ensure that research tasks are spread evenly across the research team

The **Museum Librarian** will:

- place all copies of completed research into the relevant file
- with the computer coordinator, ensure that electronically produced research is filed on the computer system
- monitor borrowings as recorded in the borrowings book
- return borrowed items to their appropriate place

Researchers will:

- Provide a quick response to each request advising of the scope and feasibility of the task
- Keep the research coordinator informed of progress
- Maintain contact with requester if possible
- Accept consultation with requester if required or desirable
- Gain permission of the requester for Berry Museum to retain a copy of the research
- Place completed research copies in the Librarian's tray.

Desk Volunteers will:

- file all research request forms in the white folder on the front desk
- place initial payments in ??? and issue a receipt
- not undertake research tasks while on duty
- not give visitors items of information from the museum's collection
- advise visitors enquiring about incomplete research requests to contact the research coordinator
- read the *Research - Instructions for Desk Volunteers* carefully.

The **Treasurer** will advise the Research Coordinator of payments for research through direct deposit.

Christine Currey
President B & DHS
28 April 2017