



STRATEGIC PLAN

2024 - 2027



Introduction

In September 2023, four new officers were elected to the Board of the Montana State Genealogical Society. Three of the new officers were taking the reins from dedicated volunteers who had led the Society since 2008. With such a monumental change in leadership, it seemed prudent to spend time thinking about and planning for the future.

Process

The MSGS Board created a Strategic Planning Committee in October 2023. We immediately got to work identifying stakeholder groups, conducting community assessments, and developing strategic plan content. We sent surveys to the membership, to statewide historical and cultural organizations, and to other genealogy societies in the region.

Next, the committee met in person in Great Falls in June 2024. Utilizing valuable information gleaned from the surveys, we refreshed the Society's mission statement and clarified its values. We also brainstormed our vision for the Society's future and identified strategic priorities that will bring that vision to fruition.

Outcomes

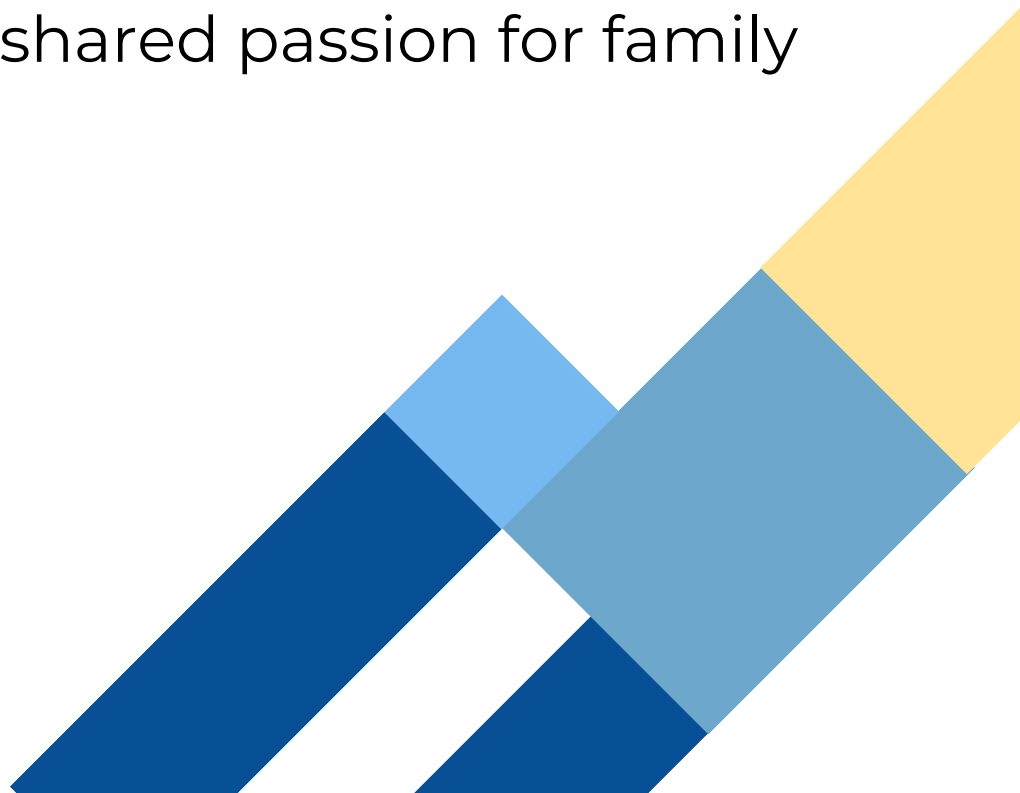
We learned that our members highly value the educational events that MSGS provides, and they are ready for more of a good thing. We have also identified opportunities for collaboration with other organizations, for increased involvement in relevant projects, and for improved communication with all MSGS's stakeholders.

MISSION

The Montana State Genealogical Society helps family historians develop skills and discover connections that enhance their research.

VISION

Our vibrant and engaged community celebrates its shared passion for family history.



VALUES

Education and skill development

We are continually learning and practicing.

Knowledge and competency

We are a reliable, trustworthy source of genealogy information.

Networks and connections

We actively engage with our community to build relationships.

Preservation and access

We are stewards of genealogically-relevant records and resources.

Helping and sharing

We strive to deliver the highest quality genealogy services and assistance.

Strategic Priority 1

EDUCATION

MSGGS provides robust, high-quality learning opportunities to our community.

- Resume and refresh our annual conference.
- Offer additional learning opportunities throughout the year.

MSGGS reaches out to foster connections and partnerships.

- Engage with various Montana organizations for mutual benefit.
- Promote our mission and goals with our membership and beyond.

Strategic Priority 2

RESOURCES

MSGs help people discover their family history.

- Create a mentorship program to connect our members and improve their skills.
- Expand and promote our research assistance services.

MSGs create, preserve, and provide access to unique Montana records.

- Create a clearinghouse of unique Montana records.
- Develop and participate in statewide projects.

Strategic Priority 3

RELATIONSHIPS

MSGs recruits and retains a diverse & inclusive membership.

- Recruit new members through in-person events and online campaigns.
- Provide meaningful events, services, and volunteer opportunities to retain members.

MSGs collaborates with organizations that share our interests.

- Seek out and provide assistance with state-level projects.
- Foster partnerships with genealogy organizations in our region.

Strategic Priority 4

DEVELOPMENT

MSGGS prepares for the future while honoring the past.

- Active a fundraising program to support current initiatives and to build capacity for future projects.
- Commit to continuous visioning for the future.

MSGGS communicates clear, current information to our members and stakeholders.

- Create a communications plan to ensure consistent messaging.
- Update bylaws, standing rules, job descriptions, and internal procedures regularly.

Conclusion

Prioritizing education and skill development empowers our members to achieve greater research expertise. Building robust networks will enhance collaboration and strengthen our community. Our dedication to preservation and access ensures that invaluable historical resources remain available. Through helping and sharing, we support one another and advance genealogy. Together, we will honor our heritage and pave the way for future discoveries.

We invite all members of the Montana State Genealogical Society to actively participate in the execution of this strategic plan. Your involvement, enthusiasm, and support are crucial to our success. Together, we will create a vibrant and dynamic society that not only honors the past but also paves the way for future genealogical discoveries and connections. Let us move forward with confidence and a shared sense of purpose.

Gratitude

A heartfelt thank you goes out to the following MSGS members who volunteered their time and talent to help plan the Society's future:

Stacey Corcino
Desirée Funston
Heidi Gibson
Jane Lee Hamman
Bill Hunter
Jan Thompson
Julie Walker





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