UNDERGROUND RAILROAD EDUCATION CENTER
Learn the Past, Be the Present, Create the Future ®

UNDERGROUND RAILROAD EDUCATION CENTER (UREC)

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STRATEGIC PLAN: 2027 – 2029

REVISED DRAFT (UPDATED WITH STAKEHOLDER FEEDBACK)

NOTE TO THE BOARD & STAKEHOLDERS: This revised draft integrates feedback from Board Members, Staff, the UREC Interpretive Center Business Plan, and nonprofit succession planning best practices. Per stakeholder consensus, rigid year-by-year and quarter-by-quarter deadlines have been removed from the strategic goals so that implementation sequencing remains flexible, cross-referenced across operational needs, and tied realistically to Capital Campaign cash flow and facility readiness. The Board of Directors will establish specific target timelines upon reviewing and adopting this framework.

1. Introduction & Planning Horizon

This 3-Year Strategic Plan guides the Underground Railroad Education Center (UREC)—incorporated in 2003 as a 501(c)(3) historical society chartered under the Regents of the University of the State of New York—through its 2027–2029 cycle. Building on 22+ years of historical research, youth empowerment, and preservation at the Stephen and Harriet Myers Residence (a National Register site, National Network to Freedom affiliate, and member of the International Coalition of Sites of Conscience), this plan positions UREC to strengthen its organizational foundation, construct and operationalize the landmark $12–$15 million Interpretive Center on Livingston Avenue, and prepare for long-term institutional sustainability beyond its co-founders.

Planning Phase	Governance & Planning Focus
2026 Q4	Review revised Strategic Plan draft and Worksheet items; Board assigns target timelines and adopts final 2027–2029 Plan.
January 1, 2027	Formal inauguration of the 2027–2029 Strategic Plan; immediate initiation of core organizational, fundraising, and programmatic priorities.

2027 – 2029 Cycle	Phased execution across all five Strategic Pillars, paced dynamically according to Capital Campaign pledge realizations, construction milestones, and staffing capacity.
2029 Q3–Q4	Comprehensive evaluation of 2027–2029 outcomes and launch of strategic planning for the 2030–2032 cycle.

2. Strategic Plan Framework

Attribute	Core Definition
Mission Statement	To research and preserve the local and national history of the Underground Railroad movement, its international connections, and its legacy to today's social justice issues, thereby empowering people of all ages to be agents of change toward an equitable and just society.
Vision (2027–2029)	To build and complete the net-zero Interpretive Center, operationalize it, and successfully transition materials, staff, and core programming into the new facility—comfortably growing into the space to scale UREC's educational, cultural, and community impact across Arbor Hill, the northern part of Albany, and the broader region while institutionalizing durable governance and leadership.
Core Identity & Scope	UREC is fundamentally a history-based educational and preservation organization whose Environmental, Social, and Governance (ESG) commitments are manifested organically through its historical research, youth programs, community partnerships, and sustainable facility—avoiding unqualified clinical or social-work liability while partnering with specialized agencies to serve neighborhood needs.
Foundational Pillars (Cross-Referenced)	Pillar I: Preservation, Capital Transition & Green Infrastructure Pillar II: Exploring & Connecting the Past with the Present (Academic & Public Programs) Pillar III: Youth Empowerment & Workforce Pipelines Pillar IV: Community Engagement, Neighborhood Synergy & Resilience Pillar V: Organizational Professionalization, Succession Planning & Financial Self-Sufficiency

Pillar I: Preservation, Capital Transition & Green Infrastructure

Transitioning from construction management to operational excellence while safeguarding the Stephen and Harriet Myers Residence, collections, and net-zero Interpretive Center infrastructure. Execution is paced to Capital Campaign cash flows and prioritizes core museum spaces first.

Goal / Objective	Strategies & Concrete Activities	Cross-References & Dependencies
1.1 Interpretive Center Construction & Net-Zero Execution	• Complete construction of the $12–$15M Interpretive Center on Livingston Avenue (with general contractor Bass-Hatfield) per existing architectural plans engineered to meet Living Building Challenge and net-zero greenhouse gas standards (including geothermal climate loops). • Prioritize immediate build-out and fit-out of mission-critical spaces first: exhibit/public assembly areas, climate-controlled collections storage, staff offices, and indoor ADA-accessible public restrooms.	• Dependent on Capital Campaign pledge realizations & construction schedule. • Cross-ref: Pillar V (Capital Campaign & Facility Grants).
1.2 Myers Residence Restoration & Collections Stewardship	• Leverage expanded storage and program capacity at the Interpretive Center to protect fragile artifacts and complete the ongoing restoration of the adjacent Stephen and Harriet Myers Residence. • Relocate and expand the physical New York State Underground Railroad Research Library into its permanent wing with dedicated archival and genealogy workspaces.	• Supports Pillar II (Research & Exhibitions) and Pillar III (Museum Studies Teen Program).
1.3 Historic Barn Frame & Environmental Justice Interpretation	• Install and interpret the salvaged Pre-Revolutionary War Mohawk Valley Dutch timber barn frame inside the main assembly/exhibit hall as a centerpiece artifact connecting 18th-century enslaved labor in New York to the struggle for freedom. • Develop educational workshops and interpretive materials (delegated to interpretive staff rather than co-founders) exploring the intersection of environmental justice, sustainable design, and Black history.	• Connects Pillar I facility assets with Pillar II curriculum and Pillar V ESG sponsorships.
1.4 Commercial Kitchen & Secondary Space Phasing	• Sequence the equipping and activation of the on-site commercial kitchen ('Harriet's Kitchen'), café, media center, and two studio apartments (for visiting scholars/artists and grounds/security personnel) after core museum, storage, and office spaces are operational.	• Enables Pillar III culinary workforce training and Pillar IV/V earned-income rentals.

	• Secure targeted facility improvement grants (e.g., NYS Office of Community Renewal, City of Albany Community Development, Reeve Foundation, Community Foundation for the Greater Capital Region) for accessibility and public amenities.	

Pillar II: Exploring & Connecting the Past with the Present

Combating historical erasure through rigorous local research, community archaeology, and transformative public programming that connects 19th-century abolitionist history to contemporary civic engagement—scaling existing strengths immediately while preparing for expanded indoor capacity.

Goal / Objective	Strategies & Concrete Activities	Cross-References & Dependencies
2.1 Immediate Expansion of Core Historical & Tour Offerings	• Scale up UREC's existing, high-performing core programs immediately—without waiting for Interpretive Center completion—by expanding standard and themed tours of the Myers Residence, Downtown Albany Walking Tours, and off-site speaker engagements. • Launch integrated multi-site heritage tour packages in partnership with Discover Albany, Amtrak corridors, I LOVE NY, and regional peers (e.g., Ten Broeck Mansion / Albany County Historical Association, Historic Cherry Hill) to grow annual visitation toward regional benchmarks.	• Immediate priority regardless of construction timeline. • Cross-ref: Pillar V (Marketing & Earned Income).
2.2 Community & Academic Archaeology	• Expand UREC's signature archaeology program immediately by welcoming both local undergraduate researchers and broader community volunteers/participants in seasonal digs and artifact analysis across UREC properties. • Integrate archaeological findings and scientific-method modules into K–12 school visits and public workshops.	• Can scale immediately on existing grounds. • Feeds Pillar I exhibits and Pillar III student training.
2.3 Rotating Exhibitions, Research Library & Media Production	• Develop a calendar of rotating exhibitions and traveling exhibit series showcasing overlooked local and international Underground Railroad activists (across the U.S., Canada, the Caribbean, Mexico, and the Atlantic world). • Activate the Interpretive Center's Research Library and Media Center for genealogy workshops, public lectures, documentary production, and educational video content.	• Clarifies and elevates Interpretive Project Manager role. • Cross-ref: Pillar I (Library/Media Wing) & Pillar V (Staffing).

2.4 Public Convenings & Annual Conference Evaluation	• Evaluate the strategic format, staffing capacity, and financial model for relaunching or reimagining the Annual Underground Railroad Public Conference once the Interpretive Center's assembly spaces are available. • Host mission-aligned civic convenings—such as historical and contemporary voting rights forums and nonpartisan voter registration drives tied to existing July 4th programming—connecting 19th-century abolitionism to modern civic agency.	• Aligns social justice mission with UREC's core historical expertise (avoiding non-mission social work).

Pillar III: Youth Empowerment & Workforce Pipelines

Investing in young people and emerging professionals through paid leadership institutes, museum studies training, academic partnerships, and facility-based workforce readiness—grounded in rigorous youth-safety and operational standards.

Goal / Objective	Strategies & Concrete Activities	Cross-References & Dependencies
3.1 Young Abolitionist Leadership Institute (YALI)	• Sustain and expand the 17-year-old Young Abolitionist Leadership Institute, serving up to 40 teens during the five-week summer session (in partnership with the City's Summer Youth Employment Program) and school-year cohorts at Albany High School. • Maintain paid stipends and youth incentives (supported by partners such as the Carl Touhey Foundation) to honor teens' time while building leadership, public speaking, and historical research skills.	• Core existing program; continues uninterrupted across Myers Residence and new Children's/Youth spaces.
3.2 Museum Studies Teen Program (MSTP) Stabilization	• Immediately stabilize and expand the Museum Studies Teen Program—building on initial support from IMLS, the Carl Touhey Family Foundation, private donors, and NYS Assemblymember Gabriella Romero—rather than deferring funding restructuring. • Establish multi-year private and state funding blocks to support paid teen cohorts gaining hands-on museum, archival, and interpretive experience.	• Immediate priority. • Cross-ref: Pillar V (Organization-wide Fundraising Restructuring).
3.3 Urban Scholars & Collegiate Internship Pipelines	• Establish formal partnerships with the Urban Scholars Program and comparable regional/national initiatives supporting underrepresented, low-income, or first-generation students from middle school through	• Directly supports Pillar II research capacity and Pillar V internal talent pipeline.

	graduate school. • Create structured internships in archival research, public history, archaeology, and nonprofit administration.	
3.4 Culinary & Green-Building Workforce Readiness	• Once the Interpretive Center is operational, launch introductory green-building/sustainability workshops (leveraging the geothermal/net-zero facility) and culinary workforce readiness training in Harriet's Kitchen. • Implement strict youth-protection, privacy, and media-consent protocols across all youth and workforce programs.	• Dependent on Pillar I facility completion and Pillar V SOPs/staffing.

Pillar IV: Community Engagement, Neighborhood Synergy & Resilience

Positioning UREC as an active community anchor and Resilience Hub for Arbor Hill and the northern part of Albany through food access, entrepreneurial support, emergency readiness, and disciplined external partnerships that respect UREC's core mission boundaries.

Goal / Objective	Strategies & Concrete Activities	Cross-References & Dependencies
4.1 Arbor Hill & Northern Albany Neighborhood Synergy	• Deepen partnerships with residents, small businesses, and civic groups in Arbor Hill and the northern part of Albany to ensure the Interpretive Center serves as a welcoming cultural anchor and economic catalyst. • Prioritize local hiring during Interpretive Center construction and ongoing facility operations, and host neighborhood-accessible community events, cultural celebrations, and civic meetings.	• Supports local economic uplift and Pillar V community board representation.
4.2 Food Oasis & Underrepresented Culinary Entrepreneurship	• Launch a recurring seasonal Arbor Hill Farmers Market in partnership with regional farms (able to begin on UREC grounds prior to full building completion) to expand fresh food access. • Provide affordable, shared-use commercial kitchen access in Harriet's Kitchen to support early-stage, underrepresented local culinary entrepreneurs and launch UREC's 'Harriet's Kitchen' baked goods line.	• Farmers market can launch early; kitchen incubation follows Pillar I kitchen activation.
4.3 Emergency Preparedness & Designated Resilience Hub	• Develop a comprehensive Emergency Preparedness Plan covering visitors, staff, community members, and historic collections—	• Coordinated with interpretive and operations

	coordinating with the Albany Fire Department (lock-box access), security providers, and city emergency managers. • Establish UREC's role as a designated Resilience Hub for the northern part of Albany, providing clean backup power, climate shelter during extreme weather, and public information distribution.	staff upon Interpretive Center occupancy.
4.4 Mission-Aligned Community Partnerships (Avoiding Mission Creep)	• Deliver community-benefit programming (such as financial literacy, small-business workshops, health fairs, or legal clinics) exclusively through vetted external partner agencies that carry appropriate professional credentials and liability coverage, allowing UREC staff to remain focused on history, education, and cultural stewardship.	• Protects staff capacity and mitigates organizational liability (Cross-ref: Pillar V).

Pillar V: Organizational Professionalization, Succession Planning & Financial Self-Sufficiency

Building the internal foundation required to sustain UREC's growth: codifying policies and staff structure, executing a disciplined Board-led succession and post-founder transition plan, strengthening Board governance, and diversifying revenue across the Capital Campaign, philanthropy, and earned income.

Goal / Objective	Strategies & Concrete Activities	Cross-References & Dependencies
5.1 Comprehensive Succession & Post-Founder Transition Plan	• Establish a formal, Board-led Succession & Transition Committee (excluding the co-founders to prevent conflicts of interest) to design and adopt both an Emergency Succession Plan (for sudden illness/absence, with documented logins, grant calendars, and interim authority) and a Planned Post-Founder Transition Playbook. • Engage the co-founders (Paul and Mary Liz Stewart) in defining a clear, realistic departure horizon (avoiding an open-ended 5–10 year drift), post-exit advisory boundaries (e.g., Director Emeritus or time-limited consulting), and a mandatory 3–6 month separation period upon a new Executive Director's hire so the successor establishes unambiguous authority. • Conduct structured oral history interviews and institutional knowledge capture with Paul and Mary Liz Stewart, longtime volunteers, and key supporters, while systematically transferring	• Top governance priority. • Budget dedicated transition/search funds (e.g., executive search firm, overlapping salary). • Cross-ref: All Pillars.

	personal donor and funder relationships to Board and development leadership.	
5.2 Organizational Structure, Policies & Staffing Expansion	• Conduct an immediate organizational structure and workflow audit to codify clear job descriptions, reporting lines, and Standard Operating Procedures (SOPs)—ensuring every current staff role (including Interpretive Project Manager, education, exhibits, and operations) is clearly integrated and supported. • Expand professional staffing capacity and competitive compensation (scaling toward the Business Plan's projected ~10 FTE / $809K personnel model as the Interpretive Center opens), prioritizing core museum/education retention alongside dedicated development/fundraising and facilities roles.	• 'Repair the foundation before building the addition': prerequisite for scaling Pillars I–IV.
5.3 Board Governance, Committee Structure & Skills Matrix	• Clarify Board charters, bylaws, and standing committee responsibilities (Governance/Nominating, Finance/Audit, Capital Campaign/Development, Facilities/Building, and Program/Collections), shifting operational tasks off co-founders and onto structured committees and staff. • Execute a Board skills-and-diversity recruitment plan targeting high-need competencies—specifically Nonprofit Finance, Fundraising/Philanthropy, Legal, Hospitality/Earned Income, and Facilities/Green Systems—while maintaining meaningful Arbor Hill / local neighborhood representation (at least 25%–33%) without tokenism.	• Empowers Board ownership of strategic execution and transition oversight.
5.4 Diversified Revenue, Capital Campaign & Donor Stewardship	• Execute the multi-year Capital Campaign (building on $8M+ already raised toward the $12–$15M project) by securing lead matching gifts and managing multi-year donor pledges realistically alongside construction cash flows. • Restructure organization-wide fundraising beyond year-end appeals ('December Dash') by launching a tiered annual Membership Program, ticketed cultural/culinary events, streamlined CRM donation processing, and corporate ESG sponsorships. • Generate sustainable earned income via commercial kitchen rentals, daytime café operations, conference/exhibit space rentals, Library/Media Center programs, and targeted	• Targets Business Plan operating budget (~$1.0M–$1.23M annual revenue) and ≥25% earned income share.

	donor/corporate heritage tours (repositioning high-tier tours so they do not overburden co-founders).

3. Integrated Marketing, Governance & Revenue Roadmap

A. Multi-Channel Marketing & Audience Engagement Strategy

- **Educational Institutions:** Automate school group bookings through Capital Region BOCES contracts and align on-site and traveling workshops directly with the NYS Social Studies Framework.
- **Heritage Tourism & Regional Visibility:** Establish cross-promotional packages with Discover Albany, Amtrak corridors, I LOVE NY, and regional historic sites (Ten Broeck Mansion, Historic Cherry Hill), utilizing both digital platforms (Google Business, TripAdvisor, social media) and traditional print/brochure distribution (e.g., Berkshire Brochures) supported by a planned annual event calendar.
- **Grassroots & Community Outreach:** Strengthen grassroots outreach across Arbor Hill and the northern part of Albany through neighborhood flyers, local media press releases, and community partner networks, alongside UREC's long-running print newsletter and Constant Contact digital bulletins.
- **Membership & Donor Funnel:** Implement a tiered membership structure and digital content funnel (podcasts, archival newsletters, Media Center documentaries) to convert casual visitors into recurring members, annual appeal donors, and attendees at ticketed signature events.

B. Organizational Capacity & Board Governance Benchmarks

As UREC transitions from a founder-led, volunteer-reliant model into a fully staffed museum and Interpretive Center, the Board and leadership will track the following institutional benchmarks (with specific target dates to be finalized by the Board):

Core Category	Current Baseline	Target Benchmark (2027–2029 Cycle)
Succession & Transition Readiness	Informal founder-led operations; no written succession playbook	Written Emergency & Planned Succession Plans adopted; Search/Transition Committee active; co-founder oral histories & donor transfer underway
HR Policies & SOPs	Informal workflows; limited written policies	Comprehensive Employee Handbook, SOPs, youth safety protocols, and updated job descriptions adopted across all roles
Staffing & Labor Mix	~3 FTE (8 staff) + 5 seasonal; ~70% Program / 30% Admin	Scale toward Business Plan model (~10 FTE / ~$809K personnel) with dedicated Development & Facilities capacity; 80% Program / 20% Admin
Earned Income Operations	Primarily tours & small-scale sales	25%+ of operating budget (~$250K–$300K+) from commercial kitchen rentals, café, event/conference rentals, and ticketed programs

Board T3 (Time, Talent, Treasure)	Varying participation & giving levels	100% active committee participation; tiered give-or-get commitment ($2,500 scaling to $5,000) with inclusive sliding scale for community seats
Board Competency & Local Representation	17-member diverse board; ad-hoc recruitment	Active committees (Governance, Finance, Development, Facilities, Programs); fill Finance, Philanthropy, Legal & Hospitality seats; maintain ≥25%–33% Arbor Hill / northern Albany representation

C. Corporate ESG & Institutional Partnership Framework

UREC's Environmental, Social, and Governance (ESG) value proposition is rooted authentically in its mission, programs, and net-zero facility. Corporate and institutional partnerships will be structured with clear benefit tiers (with donor wall recognition periods and cumulative benefits clearly defined by the Development Committee):

- **Pillar Sponsor ($25,000 / Year):** Naming opportunities for designated spaces (e.g., Research Library, Commercial Kitchen, Media Center), premier brand recognition across digital and print materials, and private corporate leadership workshops/tours led by trained interpretive staff.
- **Resilience Partner ($10,000 / Year):** Direct sponsorship of the Arbor Hill Farmers Market, youth leadership cohorts, or public lecture series, including on-site signage, press recognition, and all Heritage Circle benefits.
- **Heritage Circle ($5,000 / Year):** Annual corporate membership, priority registration for signature public convenings, and term-defined recognition on UREC's digital and lobby donor displays.

4. Board of Directors Action Worksheet

The following decision items are submitted for Board deliberation and resolution prior to final adoption of the 2027–2029 Strategic Plan:

1. Timeline & Sequencing Assignment: Review the cross-referenced objectives across Pillars I–V and assign realistic target quarters/years aligned with Capital Campaign pledge schedules and Bass-Hatfield construction milestones.

2. Succession Committee Charter & Timeline: Appoint a 5–7 member Board Succession & Transition Committee (excluding the co-founders), establish a target transition horizon with Paul and Mary Liz Stewart, and authorize budget/grant applications for executive search and transition support.

3. Organizational Foundation & HR Audit: Authorize an immediate HR and operational review to adopt an updated Employee Handbook, role descriptions, SOPs, and youth safety/privacy policies prior to Interpretive Center occupancy.

4. Programmatic Boundaries & Conference Decision: Confirm UREC's strategic boundary as a history-based educational institution that partners with qualified external providers for community social services, and decide on the future format and timing of the Annual Public Conference.

5. Historical Plan Integration & Academic Partnerships: Mine institutional knowledge and fundraising concepts from the 2021–2026 Strategic Plan draft (by Liam C. Duell and Mary Liz Stewart) and formalize Urban Scholars Program outreach.