UNDERGROUND RAILROAD EDUCATION CENTER

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UNDERGROUND RAILROAD EDUCATION CENTER (UREC)

ANONYMOUS SUMMARY OF STAKEHOLDER FEEDBACK & REVIEW NOTES

2027–2029 Strategic Planning Process — Consolidated Board & Staff Input

PURPOSE & ANONYMITY NOTICE: Because stakeholders could not convene in a single session, Board Members and Staff submitted written reactions and recommendations to the initial 2027–2029 Strategic Plan draft. In accordance with participant requests, all comments below have been fully anonymized, stripped of personal identifiers, and synthesized by theme so all participants have complete visibility into the collective feedback shaping the revised draft.

Executive Synthesis: Key Consensus Themes

Across all Board and staff submissions, five overarching themes emerged with strong alignment:

- **1. Organizational Foundation First:** Staff and Board reviewers emphasized that UREC must strengthen its internal organizational structure, written policies, Standard Operating Procedures (SOPs), and staffing capacity before—or alongside—launching ambitious new initiatives ('repair the foundation before building the addition').
- **2. Realistic, Flexible Pacing:** Reviewers noted that rigid year-by-year and quarter-by-quarter timelines do not reflect Capital Campaign realities (where pledges pay out over ~5 years) or construction timelines (which may shift by a year or more). Existing core programs should scale immediately rather than waiting until 2028 or 2029.
- **3. Dedicated Succession & Post-Founder Pillar:** Multiple participants urged adding a dedicated pillar for succession planning and post-founder transition—establishing clear timelines, Board ownership, conflict-of-interest boundaries, and institutional knowledge transfer.
- **4. Clarity of Mission & Liability Protection:** Reviewers cautioned against 'mission creep' into unqualified social work or clinical services that create liability, recommending instead that UREC anchor itself as a history-based educational institution that collaborates with qualified external partners.
- **5. Sustainable Fundraising & Revenue Diversification:** Feedback highlighted the need to move beyond founder-dependent tours and year-end appeals toward structured membership tiers, ticketed events, dedicated development staffing, and realistic earned-income projections.

1. Plan Structure, Vision, Identity & Terminology

Topic / Sub-Theme	Anonymized Stakeholder Perspectives
Plan Format & Detail Level	Some reviewers noted surprise at the sweeping, high-level format of the initial draft compared to UREC's prior plan (which used detailed Goals, Objectives, Strategies, and Activities), expressing concern that high-level phrasing left too much ambiguity around execution and staff roles.
Revised Vision Statement	Proposed an explicit operational vision: 'To build and complete the Interpretive Center, operationalize it and successfully transition the materials, staff and program into the Interpretive Center. To comfortably grow into the new space and use it to scale.'
Core Organizational Identity	Raised a foundational question: Is UREC a social justice direct-service center or a history-based organization? Reviewers noted neither current staff nor the Board is trained or credentialed for social work, and taking on such roles without best practices risks legal liability and real harm to vulnerable youth/visitors. Instead, UREC should pursue social justice through its historical mission (e.g., connecting abolitionism to voting rights and hosting voter registration drives).
Pillar Alignment	Noted that the initial draft renamed pillars differently from UREC's prior annual reports (which centered on Youth Empowerment, Community Engagement and Development, Preservation, and Exploring & Connecting the Past with the Present).
Geographic & Inclusive Language	Recommended replacing 'North Albany' (a specific distinct neighborhood) with 'the northern part of Albany' when describing broader service reach. Also recommended replacing 'minority culinary entrepreneurs' with 'underrepresented culinary entrepreneurs' to avoid pandering or proof-of-status issues in a majority-minority neighborhood.

2. Timelines, Capital Campaign & Construction Realities

Topic / Sub-Theme	Anonymized Stakeholder Perspectives
Construction & Fundraising Delays	Multiple reviewers observed that Interpretive Center construction and full capital fundraising are at least a year behind the draft's initial assumptions. Because Capital Campaign pledges are typically paid in multi-year installments (e.g., over 5 years) and the campaign is still in early data-gathering and matching-gift stages, tying strict quarterly deadlines to building completion risks setting the organization up for perceived failure.

Removing 12-Quarter Rigidity	Stakeholders recommended removing rigid year-by-year/quarter-by-quarter locks so UREC can launch high-impact programs as soon as feasible rather than artificially holding them until 2028 or 2029.
Immediate Program Acceleration	Reviewers strongly urged moving current core strengths (Pillar III in the original draft—such as archaeology, school programs, and Museum Studies funding) forward immediately, and exploring early launch of seasonal offerings like the Farmers Market prior to full building completion.

3. Interpretive Center Priorities & Facility Operations

Topic / Sub-Theme	Anonymized Stakeholder Perspectives
Space Prioritization	Recommended prioritizing mission-essential spaces first upon Interpretive Center occupancy: exhibit/public programming areas, climate-controlled collections storage, and staff offices.
Commercial Kitchen Sequencing	Suggested treating the commercial kitchen as a lower initial mission priority (viewing it partly as a personal interest area) while supporting it as a longer-term asset for culinary programming and rental revenue once core museum operations are established.
Indoor ADA Restroom & Facility Grants	Highlighted the urgent need for a permanent, indoor, ADA-accessible restroom for year-round public comfort, hygiene, and grant competitiveness, sharing potential funding avenues (City of Albany Community Development, NYS Office of Community Renewal, Christopher & Dana Reeve Foundation Quality of Life Grants, and Community Foundation for the Greater Capital Region).
Living Building Challenge & Green Tours	Clarified that architectural plans are already engineered to meet Living Building Challenge and net-zero standards (so 'fine-tuning' is already embedded in design). Reviewers questioned adding new co-founder-led green-infrastructure tours, noting co-founders should be stepping back and any new tours must be delegated to trained staff.
Emergency Preparedness Plan	Recommended expanding the Resilience Hub concept into a comprehensive facility Emergency Preparedness Plan covering both people and historic collections, developed jointly by interpretive and operations staff in coordination with the Albany Fire Department (lock-box access) and security providers.

4. Staffing, Policies & Internal Organizational Capacity

Topic / Sub-Theme	Anonymized Stakeholder Perspectives

Policies, Procedures & Role Clarity	Multiple staff members emphasized the urgent need for formalized organizational policies, procedures, and updated job descriptions. Without clear structure, current staff—including interpretive, education, and exhibit personnel—struggle to see where their positions fit into the strategic plan.
Staffing Size, Compensation & Retention	Reviewers stressed that UREC cannot execute expanded Interpretive Center programming with current staffing levels. Both staff headcount and competitive pay must increase to support the transition and ensure staff retention.
Prioritizing Core Museum Roles	Staff noted frustration at seeing new initiatives (such as green-job workshops) listed ahead of solidifying existing museum education and exhibit positions, urging leadership to reinforce core museum roles first.

5. Succession Planning & Post-Founder Transition

Topic / Sub-Theme	Anonymized Stakeholder Perspectives
Elevate to a Major Pillar	Strong consensus that succession planning and post-founder transition must be elevated from a worksheet note into a major Strategic Plan goal/pillar.
Transition Horizon & Co-Founder Clarity	While one perspective suggested a 5–10 year transition window paired with an emergency contingency plan, another urged a tighter, clearer timeline—asking the co-founders to communicate concrete plans for stepping back so the Board can plan proactively.
Board Ownership & Conflict-of-Interest Boundaries	Reviewers emphasized that executive search and transition governance must be strictly Board-led, explicitly excluding the co-founders from the search/selection committee to avoid conflicts of interest and empower the Board to take full institutional ownership.
External Search & Transition Funding	Recommended budgeting and fundraising/grant-writing specifically to hire an external executive search firm and fund transition overlap.
Institutional Knowledge & Oral Histories	Supported recording structured oral histories with both co-founders, longtime volunteers, and early supporters to preserve 22+ years of institutional memory, alongside transferring donor relationships to Board and development staff.

6. Fundraising, Earned Income, Marketing & Board Governance

Topic / Sub-Theme	Anonymized Stakeholder Perspectives

Organization-Wide Fundraising Restructuring	Urged accelerating fundraising restructuring immediately rather than waiting until 2029, including hiring dedicated development staff, streamlining donation data entry, revamping the membership program, and adding fundraising appeals beyond the year-end 'December Dash.'
Reassessing Revenue Assumptions	Questioned the realism of generating $15K/year from $100 Founders' Tours (noting current low uptake, dated academic positioning, and unwanted distraction for the co-founders), recommending instead ticketed public events, sponsored community events, and major-donor cultivation. Also clarified that studio apartments were intended to house visiting speakers/artists for programming rather than generate commercial profit.
Marketing & Brand Quality	Recommended upgrading social media quality and brand consistency, planning an annual event calendar early enough to utilize print brochure distribution (similar to Berkshire Brochures), and promoting the facility for community event rentals.
Board Structure, Committees & Representation	Requested clearer Board committee structures and stewardship expectations, questioned whether 'Green Resiliency' is a top Board seat priority compared to Finance/Fundraising, and cautioned against tokenizing Arbor Hill representation—recommending a commitment to maintaining at least 25% local representation grounded in a genuine skills inventory and active participation.
Donor Recognition Tiers	Suggested revising ESG sponsorship benefits so $5,000 gifts receive term-limited rather than permanent donor wall recognition, and clarifying that higher sponsorship tiers include all benefits of lower tiers.