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

UNDERGROUND RAILROAD EDUCATION CENTER (UREC)

Board Timeline Assignment & Sequencing Worksheet

Companion Tool to the Updated 2027–2029 Strategic Plan Draft

Instructions: Use this worksheet during Board working sessions to assign target start/completion windows, confirm prerequisite dependencies, and designate lead Board/Staff owners for every objective in the updated Strategic Plan.
Sequencing Principle: Prioritize 'Foundation-First' items (governance, HR policies, staff capacity, fundraising systems, and core historical programs) immediately, while tying facility-dependent milestones to Capital Campaign cash flow and construction completion.
Suggested Horizon Codes: IMM = Immediate (Q4 2026–Q2 2027) | Y1 = 2027 | Y2 = 2028 | Y3 = 2029 | ONG = Ongoing | FAC = Tied to IC Occupancy.

Pillar I: Preservation & Capital Transition (Interpretive Center & Myers Residence)

Strategic Objective	Key Action Summary	Suggested Lead	Key Dependency	Board-Assigned Target Timeline
1.1 Capital Campaign & Multi-Year Pledge Management	Finalize donor match strategy, track 5-year installment pledges, and align construction draws with cash-in-hand.	Board Capital Campaign Committee	Ongoing / Active	[ ]
1.2 Interpretive Center Core Build-Out (Phase 1 Spaces)	Complete Living Building Challenge / geothermal construction prioritizing Exhibit Halls, Collections Storage, Offices, and Indoor ADA Restrooms.	Facilities / Building Committee & GC	Capital Campaign & Permitting	[ ]
1.3 Secondary Facility Spaces (Phase 2 Build-Out)	Outfit Commercial Kitchen ('Harriet's Kitchen'), Café, Media Center, Children's Room, and Studio Apartments.	Facilities Committee & ED	Phase 1 Occupancy & Dedicated Funding	[ ]
1.4 Collections & Library Relocation	Relocate and expand the NYS Underground Railroad Research Library and archival storage into dedicated climate-controlled wing.	Interpretive & Collections Staff	Phase 1 IC Completion	[ ]
1.5 Myers Residence Restoration Completion	Leverage Interpretive Center operational capacity to complete remaining restoration milestones at the Stephen & Harriet Myers Residence.	Preservation Committee	IC Opening & Preservation Grants	[ ]

Pillar II: Exploring & Connecting the Past with the Present

Strategic Objective	Key Action Summary	Suggested Lead	Key Dependency	Board-Assigned Target Timeline
2.1 Core Historical & Environmental Justice Tours	Deliver integrated tours linking the Myers Residence, Downtown Albany Walking Tours, Pre-Revolutionary Dutch Barn frame, and environmental justice.	Interpretive Staff & Docents	None (Can launch/expand immediately)	[ ]
2.2 Community Archaeology Expansion	Expand hands-on archaeology digs to include both undergraduate students and local community residents.	Archaeology Lead & Staff	Seasonal (Spring/Summer)	[ ]
2.3 Mission-Aligned Civic Engagement Events	Host voter registration drives (e.g., 4th of July programming) and historical civil rights forums within UREC's core educational mission.	Program Committee & Staff	None (Immediate)	[ ]
2.4 Annual Underground Railroad Public Conference	Determine format/venue and relaunch signature conference focused on historical and modern agents of change.	Program Committee	Board decision on interim vs. IC venue	[ ]
2.5 Marketing, Branding & Tourism Packages	Launch regional tourism packages (Discover Albany, I LOVE NY, Amtrak), refreshed digital branding, and print brochure distribution.	Marketing / Outreach Staff	Annual event calendar finalized	[ ]

Pillar III: Youth Empowerment & Workforce Pipelines

Strategic Objective	Key Action Summary	Suggested Lead	Key Dependency	Board-Assigned Target Timeline
3.1 Young Abolitionist Leadership Institute (YALI)	Sustain and expand summer (SYEP) and school-year teen leadership cohorts at Albany High School and UREC.	Youth Program Staff	Existing funding / annual school cycle	[ ]
3.2 Museum Studies Teen Program (MSTP) Scaling	Secure multi-year private/state funding blocks and expand teen cohorts beyond initial pilot.	ED, Grant Writers & Youth Staff	Immediate (do not wait until 2029)	[ ]
3.3 Urban Scholars & Higher-Ed Partnerships	Explore formal internship and research partnerships with NYS/national Urban Scholars programs and local colleges.	Academic / Program Committee	Staff capacity & MOUs	[ ]
3.4 Green-Job & Culinary Workforce Workshops	Launch introductory green-building workshops and culinary micro-business incubator training in the IC.	Workforce Partners & Staff	IC Geothermal & Kitchen Completion	[ ]

Pillar IV: Community Engagement & Neighborhood Resilience

Strategic Objective	Key Action Summary	Suggested Lead	Key Dependency	Board-Assigned Target Timeline
4.1 Comprehensive Emergency Preparedness Plan	Develop facility-wide safety, fire lock-box, security response, and collections protection protocols for both buildings.	Operations/Facilities & Interpretive Staff	Immediate / Pre-IC Occupancy	[ ]
4.2 North Albany / Arbor Hill Resilience Hub	Formalize emergency shelter and extreme-weather public aid protocols with City of Albany and first responders.	Board Executive Committee & City Partners	IC Occupancy & Emergency Plan	[ ]
4.3 Arbor Hill Farmers Market & Food Access	Partner with regional farms to host a recurring neighborhood farmers market (can begin outdoors on UREC lots prior to IC completion).	Community Engagement Committee	Seasonal (Spring/Summer)	[ ]
4.4 Third-Party Community Space Rentals	Establish policies and fee structures for local organizations to host community meetings and events at the IC.	Operations & Finance Committees	IC Occupancy & Facility Policies	[ ]

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

Strategic Objective	Key Action Summary	Suggested Lead	Key Dependency	Board-Assigned Target Timeline
5.1 HR Manual, SOPs & Role Clarity	Adopt comprehensive personnel policies, Standard Operating Procedures, and updated job descriptions clarifying current staff roles.	Governance / HR Committee	Immediate (Highest Foundation Priority)	[ ]
5.2 Staffing Expansion & Compensation Alignment	Benchmark staff salaries for retention, expand FTEs for IC operations, and hire dedicated Development/Fundraising staff.	Finance & Personnel Committees	Operating budget & grant funding	[ ]
5.3 Emergency Succession Plan	Adopt short-term leadership continuity plan designating acting leadership, credential access, and emergency contacts.	Board Executive Committee	Immediate (Q4 2026 – Q1 2027)	[ ]
5.4 Board Transition & Search Committee Charter	Form 5–7 member Board committee (excluding Co-Founders) to define leadership profile, transition timeline, and search funding.	Board President & Governance Committee	Immediate	[ ]
5.5 Institutional Knowledge & Oral History Capture	Conduct recorded oral history interviews with Paul & Mary Liz Stewart and longtime volunteers; document donor/grant systems.	Transition Committee & Archival Staff	Immediate / Ongoing	[ ]

Strategic Objective	Key Action Summary	Suggested Lead	Key Dependency	Board-Assigned Target Timeline
5.6 Diversified Earned Income & Membership Revamp	Overhaul membership tiers, streamline donation processing, launch ticketed events, and evaluate/reposition premium tours.	Development Committee & Staff	Immediate	[ ]
5.7 Corporate ESG Sponsorship Program	Deploy tiered corporate sponsorship packages ($5K–$25K) aligned with UREC's net-zero facility and community impact.	Development & Capital Committees	Immediate	[ ]
5.8 Board Governance & Skills Matrix Implementation	Define Board committee charters, implement T3 give-or-get expectations, and recruit targeted skills (Legal, Finance, Development).	Governance / Nominating Committee	Immediate / Annual Board Cycle	[ ]