

Five-Year Strategic Plan

for Historic Camden Foundation

presented by SAGE Nonprofit Consultants

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Executive Summary

Almost 40 years after being established to commemorate and celebrate the extraordinary history found in Camden, South Carolina, the Historic Camden Foundation has come to a critical juncture. Faced with the need for revitalization; imminent executive director succession; a modern-day brand; updating of internal systems and processes; and the immediate need to cultivate a healthy donor and volunteer base, the board of directors have actively supported the development of this strategic plan – a plan that focuses on “transforming” Historic Camden Foundation.

The purpose of this plan is to help guide the board and executive director through a transformational phase that will address the aforementioned needs while reestablishing Historic Camden as an integral part of the City of Camden’s ambitious tourism and economic development strategy.

It is no surprise that Historic Camden Foundation is viewed as a remarkable asset for the City of Camden, Kershaw County and the state of South Carolina. Yet, its 107-acre property, facilities, programming and image are in need of revitalization to realize its full potential as a cultural crossroads for Colonial and Revolutionary War history. Even as an affiliate with the National Park Service, Historic Camden struggles to realize its full potential on a daily basis.

This strategic plan charts a path forward. It outlines a 5-year process with clear tactical steps to a transformed sustainable entity. Implementation of this plan will help provide an increased number of visitors who leave with memorable experiences and a desire to return. By strengthening from the inside out, Historic Camden Foundation will be in a stronger position to fulfill its mission each day, while working toward its vision at the same time.

This plan results from an extensive research effort that involved:

- More than 60 interviews with public officials, community and business leaders, as well as Historic Camden Foundation staff and volunteers
- A thorough assessment of Historic Camden Foundation current organization capacity – financial management, resource development/fundraising, governance, marketing and communication, and staffing
- A profile of the board’s current assets – demographics, expertise and relationships with the community
- A benchmarking study of comparable outdoor museums in the South
- Several on-site visits, including a detailed guided tour with the current executive director

Executive Summary *(cont'd.)*

This plan lays out ambitious, yet achievable, goals – the heart of which include:

- Vigorous and visionary leadership, with clarity on roles of the board and staff – with the board determining strategy and policy, and the executive director carrying out the plan
- A new brand identity supporting a clear mission and differentiating between the governing entity and the tourist destination
- Expanded programming that reflects the diverse communities that contributed to Historic Camden’s rich cultural history, and provides exciting interactive educational experiences for families
- Completion of the archaeological site assessment, using cutting-edge technology, that respects both historical and environmental integrity
- A revamped business model, including strengthened financial management practices and a plan for revenue enhancement, that will ensure Historic Camden Foundation’s sustainability

Through a consistent and thoughtful implementation of this plan, Historic Camden Foundation should expect to see positive results and a renewed energy from its members, partners and the community as a whole.

Executive Summary *(cont'd.)*

About Historic Camden Foundation

In 1967, the Camden District Heritage Foundation was created and began purchasing the Historic Camden Revolutionary War Site (Historic Camden) properties. In 1969, the Camden Historical Commission was formed in order to be eligible for bicentennial state and federal funds. This Commission was governed by the City of Camden and was designated the governing body of Historic Camden.

In 2000, the Commission was dissolved and the Foundation became Historic Camden's governing body, independent of the City of Camden and legally changed its name to the Historic Camden Foundation (HCF).

Today, Historic Camden Foundation is a multi-faceted nonprofit entity. It is an outdoor museum with a collection of historic buildings as well as traditional museum displays, 107 acres of park landscape serving as a site for a wide variety of community activities, a nature trail, a tourist information center and destination, as well as a venue for Historic Camden-sponsored events.

The actual property owned by HCF is designated "Historic Camden Revolutionary War Site," referred to by many as "Historic Camden," creating branding confusion between "Historic Camden Revolutionary War Site" and the "Historic City of Camden." For practical purposes, Historic Camden, Historic Camden Foundation and Historic Camden Revolutionary War Site may be considered as one entity, governed by a volunteer board, and administered by a paid staff as referenced in this strategic plan.

Mission & Vision

Mission:

To protect, preserve and celebrate Camden's extraordinary Colonial and American Revolutionary War history.

Vision:

To become one of the country's premier community museums of national and international significance for Colonial and Revolutionary War history by forging a path forward to a greater appreciation of America's past through preservation, research, education and interactive experience.

Overall Strategic Goals

● **Goal 1: Organizational Development**

To build a strong infrastructure of board, staff and volunteers to achieve transformation, ensure sustainability and fulfill Historic Camden Foundation's mission.

● **Goal 2: Financial Management**

To strengthen internal controls, improve financial management practices, and diversify and increase the revenue base, to ensure the sustainability of Historic Camden Foundation and fulfillment of its mission.

● **Goal 3: Resource Development**

To become a self-sustaining outdoor museum and recreation area capable of supporting the growth, maintenance and protection of Historic Camden Foundation's 107-acres and historical assets.

● **Goal 4: Site Enhancement**

To preserve and enhance both the historical and natural features of Historic Camden Foundation's assets in a manner that maintains maximum historical and environmental integrity.

● **Goal 5: Program Development**

To provide programs that serve local community needs and the public-at-large in the areas of education, recreation, preservation and interpretation.

● **Goal 6: Marketing & Communications**

To rebrand Historic Camden Foundation to create new energy that supports strategic goals; instills a sense of pride with constituents; provides a brand identity that resonates with target markets and establishes a foundation from which the organization can fulfill its mission and work toward its vision.

● Goal 1: Organizational Development

Goal: To build a strong infrastructure of board, staff and volunteers to achieve transformation, ensure sustainability and fulfill Historic Camden Foundation’s mission.

Strategy 1: Build a capable, active and inclusive board that fully supports the mission and holds itself accountable for results.

Tasks	Date	Responsible
a. Establish a Governance Committee to oversee board recruitment and education; create governance policies; and review the bylaws.	1Q16	Board Chair
b. Establish other committees to support organization transformation and strategic plan objectives.	1Q16	Board Chair
c. Increase the authorized number of board members from 15 to 17.	1Q16	Board
d. Target recruitment efforts to ensure the board reflects the diversity of communities that HCF serves, and includes the range of expertise, resources and relationships that help achieve the mission.	1Q16, Ongoing	Governance Committee
e. Evaluate the Executive Director’s performance annually, based upon agreed-upon goals.	4Q16, Annually	Board
f. Create a set of metrics that enables the board and staff to monitor the organization’s performance.	2Q16	Board, ED
g. Conduct an annual board assessment.	2017, Annually	Board, ED
h. Develop a set of values to guide organizational decision-making.	2017	Board, Staff
i. Develop a succession plan (including emergency succession).	2017, Annually update	Board, ED
j. Implement a consent agenda for board meetings.	1Q16	Board, ED
k. Ensure board members are clear about what is expected of them, with respect to “time, treasure and talent”; schedule periodic board training, making use of resources available from SCANPO and BoardSource.	1Q16, Ongoing	Board, ED

● **Goal 1: Organizational Development** (*cont'd.*)

Strategy 2: Attract, develop and retain competent and motivated staff members.

Tasks	Date	Responsible
a. Hire an executive director who can help implement this plan.	1Q16	Board
b. Restructure the organization to provide staffing that supports the mission; create a staffing plan that aligns with resources and helps drive fundraising efforts.	1Q16	ED
c. Outsource functions essential to transformation until full staffing can be achieved.	1Q16 to 2020	ED
d. Institute background checks for employees and volunteers, especially those who handle money or work with children.	1Q16, Ongoing	ED
e. Update and revise personnel policies.	2Q16, Annually	ED with Board OK
f. Revise job descriptions.	2Q16, Annually	ED
g. Develop and implement a performance evaluation program; conduct annual reviews of employees.	2017, Annually	ED
h. Provide professional development opportunities for staff, including sales and customer service training.	1Q16, Ongoing	ED
i. Recruit student interns to support operations from local community colleges, four-year colleges and universities.	1Q16, Ongoing	ED
j. Assess technology needs; develop a technology plan to maximize staff productivity.	2Q16, Ongoing	ED
k. Staffing changes: (a) Convert Admin. Asst. to full-time; (b) hire full-time Development / Events / Marketing Director	2017	ED
l. Staffing changes: (a) hire full-time Program/Volunteer Coordinator; (b) increase number of volunteers	2018	ED
m. Staffing changes: add to maintenance staff or outsource maintenance/janitorial services	2019	ED
n. Staffing changes: hire part-time person to run Gift Shop and add to weekend staff; achieve full staffing	2020	ED

● **Goal 1: Organizational Development** (*cont'd.*)

Strategy 3: Build and sustain a cadre of dedicated and capable volunteers.

Tasks	Date	Responsible
a. Assign responsibility for managing volunteers.	1Q16	ED
b. Conduct an assessment of current volunteers.	2Q16	ED, Staff
c. Provide customer-service and sales training to volunteers.	1Q16, Annually	ED, Staff
d. Develop a strategy for volunteer recruitment and retention that aligns with program initiatives and organizational needs.	2017	ED, Staff
e. Develop a volunteer handbook.	2017	ED, Staff
f. Create a volunteer recognition program.	2017	ED, Staff
g. Conduct an annual volunteer satisfaction survey.	2017, Annually	ED, Staff

● Goal 2: Financial Management

Goal: To strengthen internal controls, improve financial management practices, and diversify and increase the revenue base, to ensure the sustainability of Historic Camden Foundation and fulfillment of its mission.

Strategy 1: Improve internal controls.

Tasks	Date	Responsible
a. Segregate key financial duties among staff and board members, including the board treasurer.	2Q16	ED, Fin. Comm.
b. Include full set of financials, including Statement of Financial Position (balance sheet) in monthly review by the board of directors.	1Q16, Ongoing	ED, Fin. Comm.
c. Involve the outside CPA on a quarterly basis in the review of the accounting records (including bank reconciliations) and financials.	2Q16	ED, Fin. Comm.

● **Goal 2: Financial Management** (*cont'd.*)

Strategy 2: Improve financial management practices.

Tasks	Date	Responsible
a. Develop written financial management policies and procedures.	4Q16	ED, Fin. Comm.
b. Document and improve payroll processes and procedures, including development of timesheets that are reviewed and approved by the executive director.	2Q16	ED, Fin. Comm.
c. Bring fixed assets record management in-house (currently handled by the outside CPA).	4Q16	ED, Fin. Comm.
d. Review and revise financial reports to increase their effectiveness as tools to review the organization's performance.	3Q16	ED, Fin. Comm.

● **Goal 2: Financial Management** (*cont'd.*)

Strategy 3: Diversity and increase the revenue base.

Tasks	Date	Responsible
a. In connection with the resource development plan and consistent with the 5-year strategic plan financial projections and the budget approved by the board of directors, develop a plan to diversity and increase the organization's revenue base.	2Q16	ED, Fin. Comm.
b. Create a contingency reserve to accommodate significant expenditures, such as major repairs and staff expansion, in the future.	4Q16	ED, Fin. Comm.

● Goal 3: Resource Development

Goal: To become a self-sustaining outdoor museum and recreation area capable of supporting the growth, maintenance and protection of Historic Camden Foundation’s 107 acres and historical assets.

Strategy 1: Develop infrastructure for a robust resource development process.

Tasks	Date	Responsible
a. Recruit and train new board members who are willing to be active in the resource development process.	1Q16, Ongoing	ED, Board
b. Establish a resource development committee that includes both board members and community leaders. Involve all board members, in some fashion, in the resource development effort.	1Q16	ED, Board
c. Recruit and hire a resource development / marketing person.	2017	ED
d. Select and procure a software donor database system, assemble all lists in the database, and determine person responsible to maintain the database. Acquire both postage and email addresses.	2017	ED, Staff
e. Develop materials needed for resource development effort (such as: a simple case statement and/or annual report).	2017	ED, Staff
f. Provide opportunity for online donations through a redesigned website.	2017	ED, Staff
g. Develop and implement policies for resource development including procedure for receiving, recording, acknowledging and reporting gifts.	2017	ED, Board

● **Goal 3: Resource Development** (*cont'd.*)

Strategy 2: Develop an integrated resource development plan for the next five years.

Tasks	Date	Responsible
a. Develop and implement a board appeal program so that 100 percent of board members give a “stretch” gift to set the stage for requesting funds in the community.	1Q16, Annually	Board
b. Develop and implement a plan to market HCF facilities and grounds for rental income. Include Kershaw House, McCaa Tavern and grounds.	1Q16	ED, Staff
c. Strengthen partnership with local governments and build on partnerships with state and federal governments, and relevant state, regional and national historic organizations.	1Q16	ED, Board
d. Develop and implement a plan to generate funds through admission to the site and increase revenue from tours, workshops, programs and events.	3Q16, Ongoing	ED, Staff
e. Develop and implement a robust membership drive. Evaluate and strengthen benefits of membership and recognition of high-level members. Include a process to encourage renewals. Develop new membership brochure reflecting membership options.	2017, Ongoing	ED, Board
f. Increase revenue from gift shop. Maximize gift shop space and expand inventory. Recruit a volunteer or part-time staff person dedicated solely to buying for and managing the gift shop.	2017, Ongoing	ED, Staff
g. Develop an annual appeal to members and the community. Consider generating funds for one purpose (i.e., upgrade an exhibition, landscaping, etc.).	2017, Annually	ED, Staff, Board
h. Develop a major gifts program with a focus on individual and corporation solicitations. Conduct cultivation events for both individuals and businesses.	2017, Ongoing	ED, Staff, Board
i. Plan and host one event annually focused on generating revenue.	2018, Annually	ED, Staff, Board
j. Develop a variety of strategies to acknowledge and recognize gifts to HCF (Rule of Seven).	2017, Ongoing	ED, Staff
k. Develop a process to monitor and evaluate success of implementation of the resource development plan. Include dashboard indicating progress.	2017	ED, Staff

● **Goal 3: Resource Development** (*cont'd.*)

Strategy 3: Request grant funds based on the implementation of the strategic plan.

Tasks	Date	Responsible
a. Retain a person to research and prepare grants for HCF. Person could be contractual or volunteer.	3Q16	ED
b. Research grants (public and private) to fund components of the strategic plan.	3Q16, Ongoing	ED, Staff

● **Goal 3: Resource Development** (*cont'd.*)

Strategy 4: Develop a capital campaign to finance long-term capital projects based on long-range capital plan.

Tasks	Date	Responsible
a. Conduct a feasibility study to determine possible success of a capital campaign.	2019	ED, Staff, Board
b. Develop a case for support.	2020	ED, Staff, Board
c. Determine staffing and materials needed to manage the capital campaign.	2020	ED
d. Conduct capital campaign.	2020	ED, Staff, Board

● Goal 4: Site Improvement

Goal: To preserve and enhance both the historical and natural features of Historic Camden Foundation’s assets in a manner that maintains maximum historical and environmental integrity.

Strategy 1: Complete the site’s archaeological assessment.

Tasks	Date	Responsible
a. Complete the site’s gradiometer survey and determine next steps.	4Q16	ED, with State Archaeologist
b. Develop a plan to fund and implement next steps for preservation and programming.	2017	ED
c. Develop a plan to document the archaeological process and progress and to exhibit items from the archaeological digs.	2017	ED, Board

● **Goal 4: Site Improvement** (*cont'd.*)

Strategy 2: Develop a long-range capital improvement plan for the site. Plan should utilize archaeological findings and include needs for the existing buildings, site development, and structures to enhance the story of Historic Camden and budget for these site modifications.

Tasks	Date	Responsible
a. Conduct an assessment of current structures to determine maintenance needs and renovation needs to maximize their ability to tell the Historic Camden story.	2019	ED, with input from State Archaeologist
b. Develop a site plan utilizing the 1976 plan as a basis, incorporating current structures and outlining the need for additional structures and site improvements.	2019	ED
c. Develop a capital improvements plan with phases for development, cost of the projects and potential revenue generated.	2019	ED

● Goal 5: Program Development

Goal: To provide programs that serve local community needs and the public-at-large in the areas of education, recreation, preservation and interpretation.

Strategy 1: Provide visitors with a clear understanding of the site through exhibitions.

Tasks	Date	Responsible
a. Seek guidance from an expert to assist in the development of programs and exhibitions.	4Q16	ED
b. Develop and implement a plan to evaluate and upgrade current exhibitions. Determine needed modifications and implementation process. Partner with existing groups within the area to enhance exhibitions.	2017	ED, Staff
c. Develop an interpretative plan for the site, building on previous plans that have been developed but not implemented. Develop new exhibitions. Partner with existing entities to show connections within Camden. Include budget and timeline. Include strategy to evaluate exhibitions through public comment.	2017	ED, Staff
d. Develop a brief three-to-five minute video that describes the significance of the site and provides an overall view of the exhibitions. Video should connect the site with other historic events and locations in Camden.	2018	ED, Staff

● **Goal 5: Program Development** (*cont'd.*)

Strategy 2: Engage visitors with an interactive experience through programs, workshops and special events.

Tasks	Date	Responsible
a. Develop a calendar of a minimum of one program every quarter to engage the community with Historic Camden. Programs should require admission. Examples include receptions with session on the impact of Native Americans in the community, unique events that occurred during the Colonial period, etc. Co-sponsor programs with local groups.	2017, Ongoing	ED, Staff
b. Develop a series of educational programs based on a wide variety of topics such as the impact of waterways, native plants, and significant historic events. Programs should be individualized for families, adults and children.	2017, Ongoing	ED, Staff
c. Develop an interpretive plan with accompanying programs that showcase Historic Camden's role as a cultural crossroads, and tell the story of the different cultures that impacted Historic Camden. Include the African-American and Native American cultures, their leaders and their role.	2017	ED, Staff
d. Develop a series of hands-on workshops that engage the community, such as crafts and cooking from the Colonial period. Include workshops for families, adults, and children.	2017, Ongoing	ED, Staff
e. Develop a series of outreach programs that could be presented in classrooms to “bring the history” to children. These programs could include interactive hands-on activities.	2017, Ongoing	ED, Staff

● **Goal 5: Program Development** (*cont'd.*)

Strategy 3: Conduct regular assessments of the exhibitions and programs to determine the program's value and to incorporate feedback from visitors.

Tasks	Date	Responsible
a. Develop and implement a structured system to track attendance to Historic Camden. Partner with the City of Camden by utilizing their tracking system.	2Q16	ED, Staff
b. Gather contact information from visitors (email, postal addresses) to maintain contact with them after their visit.	2Q16	ED, Staff
c. Encourage visitors to connect with Historic Camden via social media (perhaps at the beginning or conclusion of tours or with signage).	2Q16	ED, Staff
d. Develop and implement a systematic process to solicit feedback from visitors and participants in programs (online or paper surveys, follow-up phone calls, etc.). Utilize the information to consistently modify exhibitions and activities.	4Q16	ED, Staff

● Goal 6: Marketing & Communications

Goal: To rebrand Historic Camden Foundation to create new energy that supports strategic goals, instills a sense of pride with constituents (i.e. staff, board of directors, donors, volunteers, members and community), provides a brand identity that resonates with target markets (i.e. donors and visitors as identified in the Arnett Muldrow study) and establishes a foundation from which the organization can fulfill its mission and work toward its vision.

Strategy 1: Improve brand identity for the Foundation (i.e. nonprofit) and the Historic Site.

Tasks	Date	Responsible
a. Hire a professional designer to develop a brand identity for the Foundation as the governing entity (the 501c3) and the Historic Camden site as a tourism destination (the go-to location).	1Q16	ED, Board, with outside help
b. Involve constituents and the local community in the rebranding process through a thorough feedback process (perhaps involve the community to generate interest and new energy).	1Q16	ED, Board, with outside help
c. Create branding standards to protect the integrity of the brand identity for both the Foundation and the Historic Site. This would include corporate colors, fonts, icon, etc.	1Q16	ED, Board, with outside help

● **Goal 6: Marketing & Communications** (*cont'd.*)

Strategy 2: Improve Historic Camden Foundation’s presence on the Internet and communications using current technology.

Tasks	Date	Responsible
a. Obtain a new domain name (historicc Camden.org) and prepare to build a new website at that domain versus current historic-camden.net domain.	1Q16	ED
b. Design and build a new website that is mobile-friendly, includes basic ecommerce and helps fulfill the mission through the organization’s virtual front door. This should establish a strong foundation from which future staff can expand upon.	2Q16	ED with outside help
c. Eliminate duplicate Facebook pages by moving followers from personal page to the business page.	1Q16	ED with outside help
d. Set up a Twitter account, Instagram account, YouTube channel and Google+ page.	1Q16	ED with outside help
e. Utilize outside professional help to maintain website and social media until marketing staff member is on board.	2017	ED
f. Send marketing staff member to SCANPO trainings on website practices, social media, donor databases and online giving.	2017, Ongoing	ED, Staff
g. Create event section on website (i.e. rates, available space, rules, showcase photos, etc.).	2Q16, Ongoing	ED with outside help
h. Continue to add to online gift shop (such as Shopify).	3Q16, Ongoing	ED with outside help
i. Integrate donor software with website when feasible to streamline processes and leverage newer technology.	2017	ED, Staff
j. Highlight leadership and board of directors on website and create a board-only section.	2Q16	ED with outside help
k. Develop master contact database of postal addresses and emails. House data in Constant Contact or Mail Chimp vs. Excel.	2Q16, Ongoing	ED, Staff, with outside help
l. Support annual appeals by adding information to website, sharing in newsletters and social media.	2017, Ongoing	ED, Staff
m. Create follow-up email to site visitors to keep them engaged and encourage social media connection.	3Q16, Ongoing	ED, Staff, Volunteer
n. Add blog to website and blog once a month showcasing history and sharing stories through the web. Share blog posts in newsletters and social media.	2Q16, Monthly	ED, Staff, with outside help
o. Create “Test Your Rev War History Knowledge” interactive feature on website	2018	Staff, Volunteer, with outside help

● **Goal 6: Marketing & Communications** (*cont'd.*)

Strategy 3: Improve communications and ongoing relationships with key constituent groups (i.e. members, visitors*, donors and community).

**Note: Visitor demographics and lifestyle in Arnett Muldrow study.*

Tasks	Date	Responsible
a. Support resource development efforts by creating a professionally designed case statement document to showcase the Foundation's future plans.	2Q16	ED, Mktg. Comm.
b. Set up an enewsletter account with a third-party provider such as Constant Contact, Vertical Response or Mail Chimp and send out periodic updates to individuals with email addresses on file.	2Q16	ED, Staff, Volunteer
c. Set up an editorial calendar for a printed newsletter that is sent twice a year and solicits membership renewals and donations. Provide a calendar of events in both mailings.	1Q16	ED, Staff, Volunteer
d. Create volunteer recruitment brochure for volunteer coordinator.	2018	ED, Staff
e. Set up e-communications (through Constant Contact or Mail Chimp) to communicate with volunteers.	2018, Ongoing	ED, Staff
f. Create annual report and distribute in either print or electronic version to each constituent group.	4Q16, Annually	ED
g. Hire marketing intern to assist with communications tasks, social media, website updates, etc.	2Q16, Annually	ED
h. Develop volunteer recruitment brochure, support volunteer recruitment efforts on social media channels and submit press release to community asking for qualified volunteers.	2017, Annually	ED, Staff
i. Design and print annual report to showcase progress and new changes to organization	2017, Annually	ED, Staff with outside help
j. Create an "Out and About" package for Historic Camden that includes 4x9 rack cards (i.e. brochure), tablecloth, banner and giveaway, business cards (with history tips).	2Q16	ED with outside help
k. Promote signature fundraising event through comprehensive event marketing plan (developed by marketing staff).	2018	ED, Staff, Mktg. Comm.
l. Redesign on-site visitor map and brochure so that it's easier to read and understand.	2Q16	ED with outside help
m. Create 1-2 minute showcase video to promote the history and support the mission of Historic Camden	2018-2019	Staff
n. Develop communications/PR plan to support capital campaign based on feasibility study results.	2020	ED, Staff, Mktg. Comm.

● **Goal 6: Marketing & Communications** (*cont'd.*)

Strategy 4: Announce new leadership and adoption of new strategic plan.

Tasks	Date	Responsible
a. Write and submit a press release to The State newspaper and Camden Chronicle-Independent about new leadership, future plans and vision for the organization. Share release with any partnership organizations.	1Q16	ED or Board Chair, with outside help
b. Post the press release on the new website under News section and share the link on all social media accounts.	1Q16	ED, Volunteer
c. Develop case summary to use with community to generate support and support resource development efforts.	2Q16	ED, Mktg. Comm.
d. Post case summary on new website and share on social media.	2Q16	ED, Volunteer
e. Host welcome reception at McCaa Tavern for new director	1Q16	Board Chair, Mktg. Comm.

● **Goal 6: Marketing & Communications** (*cont'd.*)

Strategy 5: Develop marketing ROI systems to track progress.

Tasks	Date	Responsible
a. Ensure Google Analytics is embedded in code of new website in order to track website track.	1Q16	ED with outside help
b. Set up systems to capture visitor emails and encourage connection through social media.	2Q16, Ongoing	ED
c. Set up generic email to promote on website for visitors to use to interact with Historic Camden and track emails (i.e. info@)	1Q16	ED with outside help
d. Run monthly reports from donor software and compare to marketing metrics (i.e. website traffic, social media traffic, etc.)	2017, Ongoing	ED, Staff
e. Create measurement report to highlight website traffic, social media connections, # of email addresses on file, gift shop sales, donations, blog posts, etc. Share report with marketing committee each month.	2017, Ongoing	ED, Staff

Attachment A: 5-Year Financial Projections for Historic Camden Foundation 2016–2020

	Current /2015	2016	2017	2018	2019	2020	Comments
REVENUES							
APPROP CITY	\$16,000	\$16,000	\$16,000	\$16,000	\$16,000	\$16,000	Assuming no change in the 5-year period
APPROP COUNTY	\$1,875	\$1,875	\$1,875	\$1,875	\$1,875	\$1,875	Assuming no change in the 5-year period
DONATIONS	\$13,000	\$25,000	\$40,000	\$50,000	\$55,000	\$60,000	Assumes increased fund-raising efforts by the board
EVENTS	\$36,000	\$40,000	\$45,000	\$55,000	\$60,000	\$60,000	Assumes increased # of events. Includes smaller, simple events to get the locals there; Fall festival. Farm to table dinner with Colonial or British theme. Est # of events by Yr4 = 4 small events @ \$5000 each, and 4 large events @ \$7500 each.
EXCHANGE (GIFT SHOP)	\$36,000	\$40,000	\$45,000	\$48,000	\$50,000	\$55,000	Increased sales in gift shop
GATE	\$11,500	\$25,000	\$45,000	\$60,000	\$70,000	\$80,000	Assumes charging for admission, plus increased fees for tours.
MEMBERSHIPS	\$12,375	\$15,000	\$20,000	\$22,000	\$26,000	\$30,000	Assumes expanded membership / fund-raising efforts by the board
RENTAL INCOME	\$7,800	\$18,250	\$26,000	\$31,250	\$33,750	\$33,750	Includes McCaa & Kershaw/Cornwallis houses. Assumes average rental of \$500 per event for McCaa, and \$550 per event for K/C house. By yr 3, assumes 35 events/yr for McCaa and 25 events/yr for K/C.
GRANTS	\$450	\$40,000	\$60,000	\$90,000	\$110,000	\$110,000	Assumes that at least 65% of the grant covers existing, budgeted expenses (including new marketing initiatives, events, new historical books etc.); 35% new expenses are reflected on Grant-Funded Program Expense line below.
OTHER REVENUE	\$0	\$0	\$20,000	\$40,000	\$15,000	\$13,000	Other new sources of revenue - through increased fund-raising efforts by the board (sponsorships, fund-raisers, etc.), pinnacles in year 3
Total Revenues	\$135,000	\$221,125	\$318,875	\$414,125	\$437,625	\$459,625	
PERSONNEL EXPENSES							
<i>PERSONNEL:</i>							
EXEC DIRECTOR	\$34,400	\$60,000	\$60,000	\$61,800	\$63,654	\$65,564	Assumes new, full-time Executive Director in place in year 1.
ADMIN ASST/IT	\$10,860	\$15,000	\$30,000	\$30,900	\$31,827	\$32,782	Assumes P/T person in yr 1, and full-time in years 2-5; this person would also help with IT-related functions.
DEVEL / EVENTS / MKTG DIRECTOR	\$0	\$0	\$45,000	\$46,350	\$47,741	\$49,173	Assumes new F/T person in place at the beginning of year 2; this role would oversee resource development efforts, events management & marketing efforts.
PROGRAM / VOLUNTEER COORDINATOR	\$0	\$0	\$0	\$45,000	\$46,350	\$47,741	Assumes new F/T person in place at the beginning of year 3; this person also serves as Volunteer Coordinator, and assumes that HCF expands use of volunteers.
MAINTENANCE / JANITORIAL	\$8,320	\$8,500	\$9,000	\$9,335	\$12,000	\$15,000	Assumes either P/T staff or outsourced firm to handle maintenance and janitorial functions.
PART-TIME/WEEKEND/ OTHER	\$11,780	\$14,000	\$15,000	\$19,200	\$22,000	\$25,000	Assumes 1 P/T person to be in charge of the Gift Shop (ie., buying, etc.) Plus weekend staff.
SUBTOTAL SALARIES	\$65,360	\$97,500	\$159,000	\$212,585	\$223,572	\$235,259	
PAYROLL TAXES (@ 7.65%)	\$5,000	\$7,500	\$12,200	\$16,300	\$17,100	\$18,000	
OTHER EMPLOYEE BENEFITS (HEALTH INSUR/OTHER)	\$0	\$8,100	\$13,300	\$17,800	\$18,700	\$19,600	
SUBTOTAL - PAYROLL TAXES & BENEFITS	\$5,000	\$15,600	\$25,500	\$34,100	\$35,800	\$37,600	
SUBTOTAL PERSONNEL EXPENSES	\$70,360	\$113,100	\$184,500	\$246,685	\$259,372	\$272,859	
OTHER EXPENSES:							
MARKETING	\$1,000	\$16,625	\$25,325	\$37,300	\$38,053	\$40,900	Target = 8.5% to 9% of total revenues (by year 3)
OTHER PROGRAM EXPENSES - DONOR MGT SOFTWARE	\$0	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	Assuming \$100/month for donor database software (cloud)
GRANT-FUNDED PROGRAM EXPENSES	\$0	\$14,000	\$21,000	\$31,500	\$38,500	\$38,500	Assuming 35% of grant revenue = additional grant-funded program expenses, including new interpretive plan, video development and additional program supplies
EXCHANGE (GIFT SHOP) - MERCHANDISE EXPENSES	\$18,950	\$21,200	\$23,850	\$25,440	\$26,500	\$29,150	Assuming 53% X exchange revenue
MAINTENANCE / GROUNDS	\$4,150	\$7,000	\$9,000	\$12,000	\$12,000	\$12,000	
EVENT EXPENSES	\$8,000	\$11,000	\$13,000	\$15,000	\$17,000	\$20,000	
UTILITIES / TELEPHONE	\$14,622	\$16,000	\$17,000	\$18,000	\$18,000	\$18,000	
INSURANCE	\$7,700	\$8,000	\$9,000	\$9,000	\$9,000	\$9,000	
OTHER OPERATIONS	\$10,339	\$13,000	\$15,000	\$18,000	\$18,000	\$18,000	
SUBTOTAL OTHER EXPENSES	\$64,761	\$108,025	\$134,375	\$167,440	\$178,253	\$186,750	
Total Expenses	\$135,121	\$221,125	\$318,875	\$414,125	\$437,625	\$459,609	
EXCESS OF REVENUES OVER EXPENSES	(\$121)	\$0	\$0	\$0	\$1	\$16	

SWOT Analysis - Summary of Findings from Interviews - *as of June 10, 2015*

What are HCF's strengths and weaknesses?

Strengths	
<ul style="list-style-type: none">• The property itself• The location (entrance to city; convenient for travelers)• Our unique and expansive history/story• Kershaw-Cornwallis House• McCaa Tavern• Programs and events; personalized tours• Commitment of board (some)• Board leadership (especially Tray & Bob)• Commitment/knowledge of staff (Joanna “amazing” and Jennifer “a go-getter”)	<ul style="list-style-type: none">• A “diamond in the rough”• Good newspaper coverage• Newsletters polished/professional• Farmers Market• Gift shop a moneymaker• Community support• City's help in maintaining property• Affiliate of NPS• Fun work environment• Private tours and the third grade day are well done.

SWOT Analysis - Summary of Findings from Interviews - *as of June 10, 2015*

What are HCF's strengths and weaknesses?

Weaknesses

- HCF has poor relationship with city/county
- ‘Bad blood’ with Chamber over visitor center issue
- Community does not embrace HCF
- Lack of sufficient funding; dependent upon city; not set up to be “self-sustaining”; always “begging” for money
- Public image: not a top attraction; little or no brand recognition outside our community
- Inadequate/tired advertising/marketing
- Board weak; lacks leadership
- Board needs greater skills, diversity, engagement, education, fundraising
- Board and staff need to be more forgiving when conflicts arise within the community
- Ex-officio members unsure of role
- Underutilized assets
- Buildings not well sited
- Property not well kept; facilities not clean; cat smell in shop; buildings need repair and are unfurnished; tour buses won't stop because of bathrooms
- Interpretation not inclusive; nothing for African Americans; nothing slave-related
- Small buildings perceived as “slave shacks” but not explained
- Limited staffing
- ED does not collaborate with others. She often uses an aggressive approach unnecessarily.
- No succession plan
- Time for a change in executive leadership

SWOT Analysis - Summary of Findings from Interviews - *as of June 10, 2015*

What are HCF's strengths and weaknesses?

Weaknesses (cont'd.)

- Local teachers experience lack of follow-through
- “A dusty relic”
- Programming repetitive; not much to bring you back
- Excuses for not pursuing new ideas
- Exhibits tired and need updating; confusing chronicling; houses disconnected
- Volunteer organization not as energized as it used to be
- Donor base is dying; median income falling; most donations small amounts
- Tour under-priced; should be \$15
- No clear marketing plan for McCaa
- Part-time staff bring little value (except for Jennifer Lee)
- Staff is rude to visitors; lack customer service attitude; not kid-friendly
- Staff communication poor; aggravated by part-time schedules
- Outdoor location puts us at risk of weather
- Wouldn't trust Joanna's data
- Unwillingness to let go of NPS pursuit
- Turf issues (redoubts on other side of street)
- Lack of landscaping barrier between HC and stadium/arena

Issues List

Issues	Possible Remedies
<p>Mission/Vision</p> <p>1. Lack of mission and vision clarity (Who are we and where do we see ourselves in the future?)</p>	<p>Review at retreat and develop during strategic planning process</p>
<p>Name/Brand Identity</p> <p>2. Name confusion (Are we a place or an entity or both?)</p>	<p>Rebrand</p>
<p>Relationships</p> <p>3. Relationships with community partners are strained</p>	<p>Get involved; re-engage yourself in the community and build/cultivate relationships</p>
<p>Affiliations</p> <p>4. Little effort to truly maximize benefits derived from current affiliations (e.g. state, archives, USC, NPS, etc.)</p>	<p>Clarify mission and solicit help from these partners</p>
<p>Executive Succession</p> <p>5. Currently no succession planning</p>	<p>Develop plan for emergency, short-term and long-term</p>
<p>Board Leadership</p> <p>6. Board leadership isn't as strong as it could be. Need 'team' leadership vs. individual focus</p>	<p>More board training and development; harness skills and available resources; recognize gaps and fill the need; repair relationships; enforce by-laws and develop stronger policy on board giving</p>
<p>Revenue</p> <p>7. Insufficient revenue for operations to operate at a capacity conducive for growth and opportunity</p>	<p>No quick solution; research grant opportunities; develop fund-raising/development plan; raise tour prices; schedule more tours</p>

Issues List

Issues	Possible Remedies
<p>Marketing</p> <p>8. Lack of cohesive marketing strategy and implementation; no plan</p>	<p>Define target markets; develop plan; identify resources; look into grant opportunities; cross promotion; enhance social media; increase connection of historical significance with other state/ regional projects (PR opportunities)</p>
<p>Facilities</p> <p>9. Physical facilities, exhibits and signage are worn down</p>	<p>Possible grant opportunity to refurbish; improve what you can now; go after resources for more extensive facelift; establish relationships with Native American and African-American communities to involve in new exhibits/programs</p>
<p>Use Of Properties/Assets</p> <p>10. Not utilizing top properties to their full potential</p>	<p>Speed up utilization of McCaa Tavern and start promoting; use more space in Kershaw mansion (not just the basement); let the community ‘experience’ those the properties for all that they are</p>
<p>Volunteer Strategy</p> <p>11. Lack of strategic volunteer recruitment and retention</p>	<p>Train current volunteers in the area of customer service; develop formal training for tour guides; think of creative ways to attract new volunteer base (volunteermatch.org; college history majors; civic groups; garden clubs; etc.)</p>

List of Interviewees

Dr. Ernestyne Adams	Joanna Craig	Jon Leader	Lance Player
Clifton Anderson	Marty Daniels	Frank Lee	Willard Polk
Robert Ariail	Bill Denton	Jennifer Lee	Rob Powell
Davie Beard	Alfred Mae Drakeford	Karen Lindsay	Albert Reed
Craig Bell	Tray Dunaway	Walker Long	David Paul Reuwer
Ingrid Blackburn	Gina Ellis-Strother	Sandra Long	Katherine Richardson
Alice Boykin	Eric Emerson	Peggy McLean	Paula Scarborough
Katherine Brown	Cindy Fussell	Mike Mischner	Jayne Scarborough
Julian Burns	Bob Giangiorgi	Jim Melton	Mayor Tony Scully
Deborah Butcher	Rickie Good	Tripp Muldrow	Linda Shaylor
Ginny Caracco	Jeffrey Graham	Laurie Parks	Carol Sheridan
Vic Carpenter	Liz Horton	Mel Pearson	John Slaughter
Hank Cassidy	Beth Jordan	Kirk Phillip	Tracy Stakely
Hope Cooper	Harriet Kennaby	Jim Piecich	
William Cox	Edwin Kohn	Jan Pierce	

Board and Staff Responsibilities:

Is it Policy or Management? Whose Job is it?

Area of Responsibility	Board	Executive Director
Long-term goals (>1 year)	Approves	Recommends & provides input
Short-term goals (< 1 year)	Monitors	Establishes & carries out
Day-to-day operations	No role	Makes all management decisions
Budget	Approves	Develops & recommends
Capital purchases	Approves	Prepares requests
Decisions on building, renovation, leasing, expansion	Makes decisions; assumes responsibility	Recommends (could also sign contracts if given authority)
Supply purchases	Establishes policy	Spends according to policy and maintains audit trail
Major repairs	Approves	Obtains estimates and prepares recommendations
Minor repairs	Policy should amount that can be spent without board approval	Authorizes repairs up to prearranged amount
Emergency repairs	Works with Exec Director	Notifies chair and acts with concurrence from chair
Cleaning & maintenance	No role (oversight only)	Sets up schedule
Fees	Adopts policy	Develops fee schedules
Billing, credit, collections	Adopts policy	Proposes policy & implements

Board and Staff Responsibilities (*cont'd.*):

Is it Policy or Management? Whose Job is it?

Area of Responsibility	Board	Executive Director
Hiring of staff	No role	Approves all hiring
Firing of staff	No role	Makes all decisions
Staff deployment and assignment	No role	Makes all decisions
Staff grievances	No role	Grievances stop at Exec Director
Personnel policies	Adopts	Recommends, administers
Salaries	Allocates line item for salaries in budget	Approves salaries with recommendation from staff
Staff evaluation	Evaluates Exec Director only	Evaluates other staff
Signing checks	No role, unless required by law	Authorized to spend money

Adapted from Board Member Manual, Aspen Publishers, Inc.

Strategic Plan Timeline

2016 Tasks

First Quarter 2016

● **Goal 1: Organizational Development, Strategy One, Board Development**

- Establish Governance Committee
- Establish other committees
- Increase authorized number of board members
- Target recruitment efforts
- Implement consent agenda
- Train board to ensure clear understanding of roles and responsibilities (ongoing)

● **Goal 1: Organizational Development, Strategy Two, Staff Development**

- Hire new executive director
- Restructure the organization and create staffing plan
- Outsource essential functions
- Institute background checks (ongoing)
- Provide professional development opportunities for staff, including sales and customer service training (ongoing)
- Recruit student interns to support operations (ongoing)

● **Goal 1: Organizational Development, Strategy Three, Volunteer Development**

- Assign responsibility for volunteer management
- Provide customer service and sales training (should be done annually)

● **Goal 2: Financial Management, Strategy One, Internal Controls**

- Provide complete monthly financials to the board (ongoing)

● **Goal 3: Resource Development, Strategy One, Infrastructure**

- Recruit and train board members in resource development (ongoing)
- Establish resource development committee

● **Goal 3: Resource Development, Strategy Two, Plan**

- Establish 100% board member giving (ongoing)
- Strengthen partnerships with local governments and other partners
- Market facilities for rental

● **Goal 6: Marketing, Strategy One, Brand Identity**

- Hire professional to develop brand identity
- Involve constituents in the process
- Create branding standards

Strategic Plan Timeline

2016 Tasks

First Quarter 2016 (*cont'd.*)

● **Goal 6: Marketing, Strategy Two, Internet Presence**

- Obtain new domain name
- Eliminate duplicate Facebook pages
- Set up other social media accounts

● **Goal 6: Marketing, Strategy Three, Constituent Communications**

- Set up editorial calendar for printed newsletter

● **Goal 6: Marketing, Strategy Four, New Leadership & Plan**

- Submit press releases
- Post release on website
- Host reception for new director

● **Goal 6: Marketing, Strategy Five, Marketing ROI**

- Utilize Google Analytics on website to monitor traffic
- Set up generic branded email for website (info@)

Second Quarter 2016

● **Goal 1: Organizational Development, Strategy One, Board Development**

- Create set of metrics to monitor success

● **Goal 1: Organizational Development, Strategy Two, Staff Development**

- Update and revise personnel policies (should be updated annually)
- Revise job descriptions (should be updated annually)
- Assess technology needs and develop technology plan (ongoing)

● **Goal 1: Organizational Development, Strategy Three, Volunteer Development**

- Conduct assessment of current volunteers

● **Goal 2: Financial Management, Strategy One, Internal Controls**

- Segregate key financial duties
- Quarterly review by outside CPA

● **Goal 2: Financial Management, Strategy Two, Financial Management Practices**

- Improve and document payroll processes

Strategic Plan Timeline

2016 Tasks

Second Quarter 2016 (*cont'd.*)

● **Goal 2: Financial Management, Strategy Three, Revenue Diversification**

- Develop revenue diversification plan

● **Goal 5: Program Development, Strategy Three, Program Evaluation**

- Develop structured system to document attendance
- Gather contact information for all visitors and participants (ongoing)
- Encourage visitors to connect with HCF (ongoing)

● **Goal 6: Marketing, Strategy Two, Internet Presence**

- Design and build new website
- Create Events section on new website
- Highlight new leadership and board on new website
- Develop master contact database
- Add blog to new website

● **Goal 6: Marketing, Strategy Three, Constituent Communications**

- Prepare professionally designed case statement
- Set up enewsletter account
- Hire marketing intern
- Create “Out and About” package

- Redesign on-site visitor brochure
- Post case summary and new vision on website (overlap with Strategy Four)

● **Goal 6: Marketing, Strategy Five, Marketing ROI**

- Set up system to capture visitor emails and data

Third Quarter 2016

● **Goal 2: Financial Management, Strategy Two, Financial Management Practices**

- Review and revise financial reports to increase their effectiveness

● **Goal 3: Resource Development, Strategy Two, Plan**

- Develop/implement plan to increase revenue from tours, workshops, programs and events
- Develop annual appeal to members and the community (should be conducted annually)

● **Goal 3: Resource Development, Strategy Three, Grants**

- Retain grant writer
- Research and apply for appropriate grants (ongoing)

Strategic Plan Timeline

2016 Tasks

Third Quarter 2016 (*cont'd.*)

● **Goal 6: Marketing, Strategy Two, Internet Presence**

- Continue to add to online gift shop
- Create follow-up email to site visitors

Fourth Quarter 2016

● **Goal 1: Organizational Development, Strategy One, Board Development**

- Evaluate Executive Director (should be done annually)

● **Goal 2: Financial Management, Strategy Two, Financial Practices**

- Develop written financial management policies
- Bring fixed assets management in-house

● **Goal 2: Financial Management, Strategy Three, Revenue Diversification**

- Create contingency reserve

● **Goal 4: Site Improvement, Strategy One, Archaeological Assessment**

- Complete the site's gradiometer survey and determine next steps.

● **Goal 5: Program Development, Strategy One, Exhibitions**

- Seek expert program advice

● **Goal 5: Program Development, Strategy Three, Program Evaluation**

- Solicit regular feedback from visitors (ongoing)

● **Goal 6: Marketing, Strategy Three, Constituent Communications**

- Create annual report and distribute electronically (annually)

Strategic Plan Timeline

2017 Tasks

● **Goal 1: Organizational Development, Strategy One, Board Development**

- Conduct board assessment (should be done annually)
- Develop values for organizational decision-making
- Develop succession plan (should be updated annually)

● **Goal 1: Organizational Development, Strategy Two, Staff Development**

- Develop and implement performance evaluation program
- Conduct performance reviews of staff (should be done annually)
- Staffing changes: (a) Convert Admin. Asst. to full-time; (b) hire full-time Development / Events / Marketing Director

● **Goal 1: Organizational Development, Strategy Three, Volunteer Development**

- Develop volunteer recruitment and retention plan
- Develop volunteer handbook
- Create volunteer recognition program
- Conduct annual volunteer satisfaction survey (should be done annually)

● **Goal 3: Resource Development, Strategy One, Infrastructure**

- Hire full-time Development / Events / Marketing Director
- Procure donor software
- Develop material needed for resource development effort
- Enable on-line donations
- Develop resource development policies and procedures

● **Goal 3: Resource Development, Strategy Two, Plan**

- Develop and implement robust annual membership drive
- Increase revenue from gift shop. Recruit a volunteer or part-time staff person dedicated solely to buying for and managing the gift shop.
- Establish and conduct major gifts program (ongoing)
- Develop recognition approaches (ongoing)
- Develop dashboard to monitor progress (ongoing)

● **Goal 4: Site Improvement, Strategy One, Archaeological Assessment**

- Develop a plan to fund and implement next steps for preservation and programming.
- Develop a plan to document the archaeological process and progress and to exhibit items from the archaeological digs.

● **Goal 5: Program Development, Strategy One, Exhibitions**

- Evaluate and upgrade current exhibitions
- Develop interpretive plan

Strategic Plan Timeline

2017 Tasks *(cont'd.)*

● **Goal 5: Program Development, Strategy Two, Interactive Experiences**

- Conduct quarterly programs to engage visitor (ongoing)
- Conduct educational programs (ongoing)
- Develop interpretive plan reflecting Historic Camden's diversity
- Develop and conduct hands-on workshops (ongoing)
- Conduct outreach programs (ongoing)

● **Goal 6: Marketing, Strategy Two, Internet Presence**

- Utilize outside help to maintain website and social media until staffing is on board
- Train marketing staff (ongoing)
- Integrate donor software with website
- Add annual appeals to website, newsletter and social media

● **Goal 6: Marketing, Strategy Three, Constituent Communications**

- Develop volunteer recruitment brochure
- Design and print annual report

● **Goal 6: Marketing, Strategy Five, Marketing ROI**

- Run monthly reports from donor software, compare with metrics
- Create measurement report for marketing committee

2018 Tasks

● **Goal 1: Organizational Development, Strategy Two, Staff Development**

- Staffing changes: (a) hire full-time Program/Volunteer Coordinator; (b) increase number of volunteers

● **Goal 3: Resource Development, Strategy Two, Plan**

- Host annual fundraiser (ongoing)

● **Goal 5: Program Development, Strategy One, Exhibitions**

- Develop informational video

● **Goal 6: Marketing, Strategy Two, Internet Presence**

- Create "Test Your Rev War History Knowledge" interactive feature on website

● **Goal 6: Marketing, Strategy Three, Constituent Communications**

- Create volunteer recruitment brochure
- Set up e-communications to communicate with volunteers
- Promote signature fundraising event

Strategic Plan Timeline

2019 Tasks

- **Goal 1: Organizational Development, Strategy Two, Staff Development**
 - Staffing changes: add to maintenance staff or outsource maintenance/janitorial services
- **Goal 3: Resource Development, Strategy Four, Capital Campaign**
 - Conduct feasibility study
- **Goal 4: Site Improvement, Strategy Two, Capital Improvement Plan**
 - Assess current structures
 - Develop site plan
 - Develop capital improvements plan
- **Goal 6: Marketing, Strategy Three, Constituent Communications**
 - Create 1-2 minute showcase video

2020 Tasks

- **Goal 1: Organizational Development, Strategy Two, Staff Development**
 - Staffing changes: hire part-time person to run Gift Shop and add to weekend staff; achieve full staffing
- **Goal 3: Resource Development, Strategy Four, Capital Campaign**
 - Develop case statement for support
 - Determine staffing/materials needed
 - Conduct campaign
- **Goal 6: Marketing, Strategy Three, Constituent Communications**
 - Develop communications/PR plan to support capital campaign