

Oneida Community Mansion House



Strategic operating plan *FY 2017 through FY 2019*

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Oneida Community Mansion House
Strategic operating plan – FY 2017 through FY 2019

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MISSION STATEMENT

Using its historic site and collections, the non-profit Oneida Community Mansion House shares the story of the Oneida Community – one of the most radical and successful of the 19th century social experiments – to explore pressing social issues that still confront audiences today.

To achieve our mission, we will:

1. Develop and use our collections and facilities for public exhibitions, tours, educational and interpretive programs, and special events that engage audiences of all ages in the examination of the societal impact and legacy of the Oneida Community
2. Publish original documents, research and related materials as a basis for educational programming, scholarly collaboration, and for enjoyment by the general public
3. Make available our site and collections for the benefit of scholars, students, and an interested public
4. Maintain and preserve the historical integrity of the Mansion House and its surrounding cultural landscape
5. Expand our collection of Oneida Community artifacts and related primary source material to create a more complete context for understanding the Oneida Community's history and impact as a social and economic model
6. Exercise responsible stewardship of resources in order to support and sustain our mission

The 2015-2020 Strategic Framework document identifies five broad goals for the organization and one programming initiative. The present strategic plan document indicates its intersection with that Framework by citing SF-1, SF-2, etc. Most operating goals and objectives actualize multiple Framework statements.

Curatorial & Collections – FY17 – FY19

Goal 1: Improve curatorial and collection care staff competencies.
(SF-1, SF-3, SF-5)

Objective 1a: Recruit Curator.

Y1 tasks: Redefine position & responsibilities, and recruit.
Resources: Executive Director, 20 hrs.

Objective 1b: Recruit part-time Registrar.

Y1 tasks: Define position & responsibilities, recruit.
Resources: Executive Director, 10 hrs.

Y2 tasks: Fund PT registrar through project grant.
Resources: Curator of Collections, 20 hrs; Executive Director, 4 hrs;
IMLS support ≤ 50%.

Y3 tasks: Fund PT registrar through project grant.
Resources: Curator of Collections, 20 hrs; Executive Director, 4 hrs;
IMLS support ≤ 50%.

Goal 2: Improve scholarly awareness of the site and collections.
(SF-1, SF-4, SF-5, SF-6)

Objective 2a: Publicize unique source material

Y1 task: Curate exhibit on architecture, publish original document
in *New Circular*.
Resources: Curator of Collections, 84 hours (curating & editing).
Other direct costs: \$1500 (design & production).

Y2 task: Curate exhibit about gender in the 19th and early 20th c.,
publish original document in *New Circular*.
Resources: Curator of Collections, 84 hours.
Other direct costs: \$1500 (design & production).

Y3 task: Curate exhibit about religious ideologies in the 19th and
early 20th c. publish original document in *New Circular*.
Resources: Curator of Collections, 84 hours.
Other direct costs: \$1500 (design & production).

Objective 2b: Improve outreach to students and scholars.

Y1 task: Promote publication of scholarly book by Wonderley (*Oneida Utopia: Bible Communism to Welfare Capitalism*, Cornell University Press, fall 2016) through outreach talks.
Other direct costs: \$250 (local travel).

Objective 2c: Improve access for visiting scholars.

Y1 task. Establish visiting research procedures and facilities.
Resources: Curator of Collections, 15 hours

Objective 2d: Establish intern program encouraging research of collections and of site.

Y1 task: Define opportunity, establish collegiate relationships, secure funding.
Resources: Curator of Collections, 40 hrs; Curator of Education 10 hrs.; Executive Director, 20 hrs.

Y2 task: Announce opportunity, recruit semester candidate.
Resources: Curator of Collections 55 hrs; Executive Director, 10 hrs.
Other direct costs: \$4500 (stipend and housing).

Y3 task: Supervise semester intern program.
Resources: Curator of Collections 55 hrs.; Executive Director, 10 hrs.
Other direct costs: \$4500 (stipend and housing).

Goal 3: Improve collections management and care.
(SF-1, SF-3, SF-5, SF-6)

Objective 3a: Upgrade collection storage conditions and maintenance protocols.

Y1 task: Finish internal review of holdings required by Collections Management Policy; obtain/improve storage conditions.
Resources: Registrar (*see below*) 60 hrs.; Curator of Collections 350 hours;
Other direct costs: \$3600 (materials and equipment).

Y2 task: Continue review of holdings and to improve storage conditions.
Resources: Registrar 50 hrs.
Other direct costs: Archival materials, \$500.

Y3 task: Continue review of holdings and to improve storage conditions.

Resources: Registrar 50 hrs.
Other direct costs: Archival materials, \$500.

Objective 3b: Increase security of display collections. (See also: Buildings Goal 2.)

Y1 tasks: Determine appropriate systems.
Resources: Curator of Collections 20 hrs; Director B&G 20 hrs.

Y2 task: Install improved system (pending funding)
Registrar 10 hrs; Curator of Collections 5 hrs; Director B&G 20 hrs.;
IMLS support ≤ 50%.
Other direct costs: cameras, alarms. See B&G Objective 3b.

Objective 3c: Improve record keeping and care of collection.

Y1 task: Recruit part-time Registrar.
Resources: (this is 2c).

Y2 task: Catalog 2,000 artifacts.
Resources: Registrar 800 hrs.
Other direct costs: none.

Y3 tasks: Catalog 2,000 artifacts.
Resources: Registrar 800 hrs.
Other direct costs: none.

Objective 3d: Complete inventories of objects acquired from OL Sales Office.

Y1 task: Prepare record summaries and locator keys.
Resources: Curatorial Associate, 70 hrs.
Other direct costs: none.

Y2 task: Continue inventories; write report to EveryWare Global, Inc. (discharging OCMH legal obligations).
Resources: Curatorial Associate, 40 hrs.
Other direct costs: none

Objective 3e: Provide for object acquisitions. (SF-4, SF-5)

Y1 task: Coordinate acquisition identification and deeds.
Resources: Curator of Collections, 20 hrs.
Other direct costs: \$1500 (acquisition fund).

Y2 task: Coordinate acquisition identification and deeds.
Resources: Curator of Collections, 20 hrs.
Other direct costs: \$1500 (addition or roll-over).

Y3 task: Coordinate acquisition identification and deeds.
Resources: Curator of Collections, 20 hrs.
Other direct costs: \$1500 (addition or roll-over).

Objective 3f: Improve existing storage, safety.

Y1 task: Review lists of objects prepared for Historic Preservation Committee; assess options for security and preventive conservation; apply for study grant.
Resources: Curator of Collections 40 hrs; Executive Director 20 hrs.
Other direct costs: consulting collections specialist, pending NEH funding.

Y2 task: Complete storage assessment, implement recommendations.
Resources: Curator of Collections, 160 hrs.
Other direct costs: \$3100 (materials & supplies)

Education & Programs – FY17 – FY19

Goal 1: Advance public use of the collection and site through public programming across a range of topics and themes.

(SF-1, SF-2, SF-3, SF-4, SF-5)

Objective 1a: Mansion House programming that connects to central themes, such as: utopians, religious ideologies, work/labor, socialism(s), gender roles and relationships, social solidarity, child-rearing, industrialization.

Y1 Task: Gender and Family theme in connection with NYS Women’s Suffrage Centennial. Spring (2017): film series on gender done in collaboration with other institutions. Fall: three talks
Resources: Curator Ed. 140 hrs; Curator Coll. 8 hrs; Marketing, 8 hrs.; NYS Council for Humanities ≤ 50%.
Other direct costs: \$1000 (licensing fees, speaker honorariums).

Y2 Task: Religious ideologies. Spring film series, fall speakers.
Resources: Curator Ed. 100 hrs; Curator Coll. 8 hrs; Marketing, 8 hrs.; NYS Council for Humanities ≤ 50%.
Other direct costs: \$1000 (licensing fees, speaker honorariums).

Y3 Task: Work, labor, class. Fall series on OC/OCL/OL industrial history, household and industrial labor, social stratification and cohesion, present-day manufacturing.
Resources: Curator Ed. 80 hrs; Curator Coll. 8 hrs; Marketing, 4 hrs.
Other direct costs: \$400.

Objective 1b: Off-site programming that brings OCMH history to a wider audience. Begin with one presentation a year in conjunction with other historic sites, learning institutions, or community groups. Add a presentation each year for a maximum of three a year.

Y1 task: Collaborate on two presentations on women’s issues with museums; day trip program as a special event.
Resources: Curator Ed. 80 hrs; Marketing, 5 hrs.; NYS Council for Humanities ≤ 50%.
Other direct costs: \$500 (transportation, materials).

Y2 task: Collaborate with Hamilton College’s Special Collections in discussion of Shaker and Oneida communities and religious ideologies.
Resources: Curator Ed. 80 hrs; Marketing, 5 hrs.
Other direct costs: \$500 (transportation, materials).

Y3 task: Program with SU Special Collections (where we have materials) or Syracuse Peace Council on socialism/bible communism.

Resources: Curator Ed. 20 hrs; Marketing, 5 hrs.

Other direct costs: \$300 (transportation, materials).

Objective 1c: Create on-line resources, including virtual house tour, mini-documentaries (5 minutes on one key issue), enrichment materials and primary sources, all accessible through the website.

Y1 task: Produce mini-docs: Dress Reform, Women's Work (with summer digi-history intern).

Resources: Curator Ed. 80 hrs.; Intern 70 hrs.; Videographer, 20 hrs.; NEH America's Media Makers ≤ 50%.

Other direct costs: \$5300 (including stipend and housing).

Y2 task: Produce mini-docs: Bible Communism, Oneida Community and the Second Great Awakening

Resources: Curator Ed. 100 hrs. Videographer, 20 hrs.; NEH America's Media Makers ≤ 50%.

Other direct costs: \$800

Y3 task: User needs analysis of on-line resources/delivery, prepare scripts, etc. Produce mini-doc about animal traps

Resources: Curator Ed. 60 hrs.; Videographer 20 hrs. @ \$40 an hour; NEH America's Media Makers ≤ 50%.

Other direct costs: \$800.

Objective 1d: Develop Historic Preservation workshops to be held semi-annually in Y1 increasing to quarterly in Y3.

Y1 task: January (indoor preservation); July (outdoor preservation).

Resources: Curator Ed. 30 hrs; Buildings & Grounds 10 hrs.

Other direct costs: \$1000 instructor fees; supplies \$150.

Y2 task: January (indoor); April (either topic); August (outdoor preservation).

Resources: Curator Ed. 35 hrs; Buildings & Grounds 15 hrs.

Other direct costs: \$1500 instructor fees; supplies \$225.

Y3 task: January; April; August; November.

Resources: Curator Ed. 40 hrs; Buildings & Grounds 20 hrs.

Other direct costs: \$2000 instructor fees; supplies \$300.

Goal 2: Advance programming for students by implementing focused programs for key age/grade cohorts in grades 6 through 16 (middle school through tertiary).

(SF-1, SF-4, SF-5)

Objective 2a: Develop and promote lesson plans for grades 7, 8 and 11, aligned to curricular standards for history and social sciences.

Y1 Task: Evaluate materials with teachers in those grades. Design and print lesson plans and promotional materials.

Resources: Curator Ed. 60 hrs.

Other direct costs: \$500 (design and printing)

Objective 2b: Increase outreach to underserved schools in upstate New York.

Y1 Task: Develop a list of underserved schools in Madison, Oneida, and Onondaga counties based on the number of students in district participating in the free and reduced lunch program. Contact curriculum supervisors or administrators with information about our field trip program (including transportation fund) and outreach programs in August and January. Also include them on monthly mailing list (Marketing 1b).

Resources: Curator of Ed. 60 hrs.

Costs: \$350 (printing & postage, transportation).

Y2 Task: Revise list of underserved schools in Madison, Oneida, and Onondaga counties based on the number of students in district participating in the free and reduced lunch program. Contact curriculum supervisors or administrators with information about our field trip program (including transportation fund) and outreach programs in August and January. Also include them on monthly mailing list (Marketing 1b).

Resources: Curator of Ed. 60 hrs.

Costs: \$350 (printing & postage, transportation).

Y3 Task: Revise list of underserved schools in Madison, Oneida, and Onondaga counties based on the number of students in district participating in the free and reduced lunch program. Contact schools with information about our field trip program (including transportation fund) and outreach programs in August and January. Also include them on monthly mailing list (Marketing 1b).

Resources: Curator of Ed 60 hrs.

Costs: \$350 (printing & postage, transportation).

Goal 3: Advance the effectiveness of our programming by aligning it with audience research and program evaluation.
(SF-1, SF-2, SF-3, SF-4, SF5)

Objective 3a: Evaluate efficacy of tour communication and of guide-user interactions by analyzing qualitative data provided by tour guides.

Y1 Task: Involve tour guides with writing accurate summaries of interactions and discussion within each of their tour groups.
Resources: Curator Ed. 80 hours, Docents 10 hours each.
Other direct costs: \$100 supplies.

Y2 Task: Involve tour guides with writing accurate summaries of interactions and discussion within each of their tour groups.
Resources: Curator Ed. 80 hours, Docents 10 hours each.
Other direct costs: \$100 supplies.

Y3 Task: Involve tour guides with writing accurate summaries of interactions and discussion within each of their tour groups.
Resources: Curator Ed. 80 hours, Docents 10 hours each.
Other direct costs: \$100 supplies.

Objective 3b: Evaluate efficacy of programs and exhibits using qualitative and mixed-methods user evaluations of MH visits.

Y1 Task: Distribute, collect and analyze user evaluation forms collected from daily visitors.
Resources: Curator of Ed. 100 hours.
Other direct costs: \$25 supplies.

Y2 Task: Distribute, collect and analyze user evaluation forms collected from daily visitors.
Resources: Curator of Ed. 100 hours.
Other direct costs: \$25 supplies.

Y3 Task: Distribute, collect and analyze user evaluation forms collected from daily visitors.
Resources: Curator of Ed. 100 hours.
Other direct costs: \$25 supplies.

Goal 4: Broaden use of the physical site.
(SF-1, SF-2, SF-3, SF-4, SF-5, SF-6)

Objective 4a: Create lifelong learner tours that feature unique areas of the site: cemetery, built environment, 'behind the scenes', collections, etc.

Y1 Task: Fall cemetery tour, Winter BTS tour.

Resources: Curator of Ed. 50 hrs.; Dir. Buildings & Grounds 10 hrs.; Housekeeping 10 hrs.; Marketing, 5 hrs.
Other direct costs: \$200 (supplies).

Y1 Task: Develop architectural tour of site, aligned with exhibit in the Gorman Gallery

Resources: Curator of Ed. 80 hrs.; Marketing, 2 hrs.

Y2 Task: Fall cemetery tour, Winter BTS tour, Spring BE tour.

Resources: Curator of Ed. 75 hrs.; Dir. Buildings & Grounds 10 hrs.; Housekeeping 10 hrs.; Marketing, 5 hrs.
Other direct costs: \$200 (supplies).

Y2 Task: Develop on-line version of architectural tour.

Resources: Digital design intern 320 hrs.
Other direct costs: Intern stipend.

Y3 Task: Fall cemetery tour, Winter BTS tour, Spring BE tour.

Resources: Curator of Ed. 75 hrs.; Dir. Buildings & Grounds 10 hrs.; Housekeeping 10 hrs.; Marketing, 5 hrs.
Other direct costs: \$200 (supplies).

Y3 Task: Revise trail use and garden programs.

Resources: Curator of Ed. 40 hrs.; Marketing, 5 hrs.
Other direct costs: \$500 design & printing.

Objective 4b: Develop cross-generational programming that makes use of our gardens and trails during spring, summer, and fall (beginning with Spring 2017).

Y1 Task: Recruit a FT or PT horticultural specialist who can contribute to program development.

Resources: Dir. Building & Grounds 20 hrs; Curator of Ed., 10 hrs.
Other direct costs: \$150 services.

Y2 Task: Create geocaching program elements.

Resources: Curator of Ed. 80 hrs.
Other direct costs: \$300 materials & supplies.

Y3 Task: Create nature tours of site flora & fauna.

Resources: Curator of Ed. 100 hrs.
Resources: \$450 materials & supplies.

Objective 4c: Improve self-guided accessibility to exhibit interpretation.

Y1 Task: Create laminated written materials in period exhibit rooms. Create podcasts for audio self-guided tours.

Resources: Curator Ed. 80 hrs; Curator Coll. 8 hrs; Marketing 8 hrs.

Other direct costs: \$200 (printing & laminating)

Marketing & Development - FY17 - FY19

Goal 1: Increase public awareness of the Mansion House as a site of heritage and cultural resource by promoting its history, architecture and social themes; as educational and tourist destination.

(SF-1, SF-2, SF-3, SF-4, SF-5, SF-6)

Objective 1a: Develop general use marketing materials (postcard and/or e mail) to refer specific use (education, history) stakeholders to web and telephone announcements.

Task Y1: Create graphics and copy for postcard/s (AASLH and K-12), create graphics and copy for emails (K-12) and website regarding seasonal programming.

Resources: AED 15 hrs.

Metric: Quantifiable response to correspondence from targets and engagement in programming.

Task Y2: Create graphics and copy for postcard, create graphics and copy for emails and website to describe seasonal programming.

Resources: AED 15 hrs.

Metric: Quantifiable response to correspondence from targets and engagement in programming.

Task Y3: Create graphics and copy for postcard, create graphics and copy for emails and website to describe seasonal programming.

Resources: AED 15 hrs.

Metric: Quantifiable response to correspondence from targets and engagement in programming.

Objective 1b: Improve communications with key program users.

Task Y1: Coordinate with Education Curator to create postcards and list for monthly mailing to educators and other decision-makers.

Resources: AED 144 hrs.

Other direct costs: Printing & postage \$1400 (pending funding).

Metrics: Measurable response and engagement in programming.

Task Y2: Coordinate with Education Curator to create postcards and list for monthly mailing to educators and other decision-makers.

Resources: AED 120 hrs.

Other direct costs: Printing & postage \$1400 (pending funding).

Metrics: Measurable response and engagement in programming.

Task Y3: Coordinate with Education Curator to create postcards and list for monthly mailing to educators and other decision-makers.

Resources: AED 120 hrs.

Other direct costs: Printing & postage \$1400 (pending funding).

Metrics: Measurable response and engagement in programming.

Objective 1c: Issue regular press releases about programs & publications. (see also: electronic newsletter below.)

Task Y1: Twelve press statements.

Resources: AED 30 hrs.

Other direct costs: ~ \$25/month electronic communications

Metrics: By measurable notice placement in selected media outlets.

Task Y2: Twelve press statements.

Resources: AED 30 hrs.

Other direct costs: ~ \$25/month electronic communications

Metrics: By measurable notice placement in selected media outlets.

Task Y3: Twelve press statements.

Resources: AED 30 hrs.

Other direct costs: ~ \$25/month electronic communications

Metrics: By measurable notice placement in selected media outlets.

Objective 1d: Create quarterly electronic newsletter for active contacts all members informing them of news and forthcoming events. (see also: monthly press notices.)

Task Y1: Bi-weekly publicity announcement.

Resources: AED 30 hrs.

Other direct costs: ~ \$25/month electronic communications

Metrics: Response to correspondence and engagement in programming.

Task Y2: Bi-weekly publicity announcement.

Resources: AED 30 hrs.

Other direct costs: ~ \$25/month electronic communications

Metrics: Response to correspondence and engagement in programming.

Task Y3: Bi-weekly publicity announcement.

Resources: AED 30 hrs.

Other direct costs: ~ \$25/month electronic communications

Metrics: Response to correspondence and engagement in programming.

Objective 1e: Promote recent publications on Mansion House history through outreach.

Task Y1: Develop promotional opportunities that are not covered by publishers. (Dovetails with Curatorial plan.)

Resources: AED 45 hrs.

Other direct costs: \$500 possible travel expenses.

Metrics: Attendance, book sales.

Objective 1f: Cross-market with regional tourist, historic sites and hospitality service providers.

Task Y1: Develop programming to cross-market with other regional venues and to be developed further in consultation with them: e.g. Shakowi Cultural Center, local vineyards or breweries, Peterboro Civil War Weekend.

Resources: AED 120 hrs.

Other direct costs: local transportation.

Metrics: Successful programming as per attendance.

Task Y2: Develop programming to offer cross-market with other regional venues and to be developed further in consultation with them: e.g. travel organizers, Am Bus Assoc, Am Auto Assoc,

Resources: AED 120 hrs.

Other direct costs: local transportation.

Metrics: Successful programming as per attendance.

Task Y3: Develop programming to offer cross-market with other regional venues and to be developed further in consultation with them.

Resources: AED 120 hrs.

Other direct costs: transportation to meeting.

Metrics: Successful programming as per attendance.

Objective 1g: Promote overnight lodging as experience of historic landmark and OC history.

Task Y1: Create promotion brochure for overnight lodging opportunities.

Resources: AED 30 hrs.; ED 20 hrs.; Consulting graphic designer 10 hrs.

Other direct costs: \$1800 printing & distribution.

Metric: Increased numbers of lodgers.

Task Y1: Market lodging opportunities to US and foreign tourists through Canadvac and other travel agencies.

Resources: AED 20 hrs.; Business Manager 30 hrs.; ED 10 hrs.

Other direct costs: NA.

Metric: Increased numbers of lodgers.

Task Y2: Market lodging opportunities to US and foreign tourists through Canadvac and other travel agencies.

Resources: AED 20 hrs.; Business Manager 30 hrs.; ED 10 hrs.

Other direct costs: \$1,800 printing, distribution.

Metric: Increased numbers of lodgers.

Task Y3: Market lodging opportunities to US and foreign tourists through Canadvac and other travel agencies.

Resources: AED 20 hrs.; Business Manager 30 hrs.; ED 10 hrs.

Other direct costs: \$1,800 printing, distribution.

Metric: Increased numbers of lodgers.

Objective 1h: Improve event marketing to emphasize event fit with NHL.

Task Y1: Revise marketing information to clarify expectations and desired outcomes. Re-align marketing to users/events that benefit from or desire historic landmark sites.

Resources: AED 20 hrs.; Business Manager 30 hrs.; ED 10 hrs.

Other direct costs: NA.

Metric: Events compatible with mindful use of NHL site.

Goal 2: Create and maintain coordinated review of programming and audience data to guide and inform marketing and outreach.

(SF-1, SF-2, SF-3, SF-4, SF-5, SF-6)

Objective 2a: Improve cross-departmental communication to advise marketing.

Task Y1: Meet bi-weekly to review and plan.

Resources: AED 158 hrs.

Metrics: Timely coordination of programming and marketing.

Task Y2: Meet bi-weekly to review and plan.

Resources: AED 158 hrs.

Metrics: Timely coordination of programming and marketing.

Task Y3: Meet bi-weekly to review and plan.

Resources: AED 158 hrs.

Metrics: Timely coordination of programming and marketing.

Goal 3: Increase membership, retention and annual giving.
(SF-1, SF-2, SF-4, SF-5)

Objective 3a: Improve methods to broaden membership and promote retention.

Task Y1: Conduct research regarding non-renewal, via telephone and email surveys.

Resources: AED 20 hrs.

Metric: Analysis of principal rationales for non-renewal.

Task Y1: Include incentive of hospitality services, e.g. lodging discount to multiple member categories.

Resources: AED 2 hrs.

Other direct costs: \$500 annually.

Metric: Improved retention and level of renewals.

Task Y1: Create incentive program with Liberty Tabletop; discounts on flatware.

Resources: AED 10 hrs.

Metric: Improved retention and level of renewals.

Task Y1: Create organizational memberships/levels.

Resources: AED 5 hrs.

Metric: Improved retention and level of renewals.

Task Y1: Expand use of electronic newsletter (dovetails with promotional communications).

Resources: AED 96 hrs. (edit, publish).

Metrics: New members, Improved retention and level of renewals.

Task Y2: Conduct research regarding non-renewal, via telephone and email surveys.

Resources: AED 20 hrs.

Metric: Analysis of principal rationales for non-renewal.

Task Y2: Evaluate incentive of hospitality services, e.g. lodging discount for more member categories.

Resources: AED 2 hrs.

Other direct costs: \$500 annually.

Metric: Improved retention and level of renewals.

Task Y2: Evaluate incentive program with Liberty Tabletop; discounts on flatware

Resources: AED 10 hrs.

Metric: Improved retention and level of renewals.

Task Y2: Evaluate institutional level of membership.

Resources: AED 5 hrs.

Metric: Improved retention and level of renewals.

Task Y2: Expand use of electronic newsletter (see also promotional communications).

Resources: AED 96 hrs. (edit, publish).

Metrics: New members, Improved retention and level of renewals.

Task Y3: Conduct research regarding non-renewal, via telephone and email surveys.

Resources: AED 20 hrs.

Metric: Analysis of principal rationales for non-renewal.

Task Y3: Maintain or discontinue incentive of hospitality services.

Resources: AED 2 hrs.

Other direct costs: \$500 annually.

Metric: Improved retention and level of renewals.

Task Y3: Maintain or discontinue incentive program with Liberty Tabletop.

Resources: AED 10 hrs.

Metric: Improved retention and level of renewals.

Task Y3: Promote institutional memberships.

Resources: AED 5 hrs.

Metric: Improved retention and level of renewals.

Task Y3: Expand electronic newsletter (see also promotional communications).

Resources: AED 96 hrs. (edit, publish).

Metrics: New members, Improved retention and level of renewals.

Objective 3b: Improve methods of Annual Appeal to broaden participation and promote giving.

TaskY1: Produce letters from prominent stakeholders; highlight key activities; address interest groups.

Resources: AED 11 hrs.

Metrics: Produce letters aligned to stakeholder segments.

TaskY1: Prepare mailing of ~500 fund appeal letters.

Resources: AED 35 hrs.

Other direct costs: \$250 (letterhead and postage).

Metric: Improved response to Annual Appeal.

TaskY1: Process gifts and acknowledgements.
Resources: AED 550 hrs.
Other direct costs: \$300 (letterhead, postage).
Metric: Improved response to Annual Appeal.

TaskY2: Assess/re-align interest categories, authors.
Resources: AED 11 hrs.
Metrics: Produce letters aligned to stakeholder segments.

TaskY2: Prepare mailing of ~600 fund appeal letters.
Resources: AED 35 hrs.
Other direct costs: \$300 (postage, letterhead).
Metric: Improved response to Annual Appeal.

TaskY2: Process gifts and thank you letters.
Resources: AED 550 hrs.
Other direct costs: \$400 (letterhead, postage).
Metric: Improved response to Annual Appeal.

TaskY3: Assess/re-align interest categories, authors.
Resources: AED 11 hrs.
Metrics: Produce letters aligned to stakeholder segments.

TaskY3: Prepare mailing of ~1000 fund appeal letters
Resources: AED 35 hrs.
Other direct costs: \$500 (postage, letterhead).
Metric: Improved response to Annual Appeal.

TaskY2: Process gifts and thank you letters.
Resources: AED 550 hrs.
Other direct costs: \$650 (letterhead, postage).
Metric: Improved response to Annual Appeal.

Finance & Administration - FY17 - FY19

Goal 1: Maintain and preserve the Mansion House by improving control of revenue & expenditures.

(SF-1, SF-2, SF-4, SF-5, SF-6)

Objective 1a: Improve annual fixed assets budgeting.

Y1 task: Work with department heads to analyze fixed asset projects needs (e.g. office, residential, security, safety).

Resources: Business Manager 35 hrs.; Departments 20 hrs.

Other direct costs: none.

Y1 task: Help identify funding resources for fixed asset projects.

Resources: Business Manager 60 hrs.; Departments 40 hrs.

Other direct costs: none.

Y1 task: Monitor & account for restricted funds weekly.

Resources: Business Manager 260 hrs.

Other direct costs: none.

Y2 task: Work with department heads to analyze fixed asset projects needs (e.g. office, residential, security, safety).

Resources: Business Manager 35 hrs.; Departments 20 hrs.

Other direct costs: none.

Y2 task: Help identify funding resources for fixed asset projects.

Resources: Business Manager 60 hrs.; Departments 40 hrs.

Other direct costs: none.

Y2 task: Monitor & account for restricted funds weekly.

Resources: Business Manager 260 hrs.;

Other direct costs: none.

Y3 task: Work with department heads to analyze fixed asset projects needs (e.g. office, residential, security, safety).

Resources: Business Manager 35 hrs.; Departments 20 hrs.

Other direct costs: none.

Y3 task: Help identify funding resources for fixed asset projects.

Resources: Business Manager 60 hrs.; Departments 40 hrs.

Other direct costs: none.

Y3 task: Monitor & account for restricted funds weekly.

Resources: Business Manager 260 hrs.;

Other direct costs: none.

Objective 1b: Improve operations budgeting.

Y1 task: Work with department heads to review operational needs and costs; circulate a monthly ledger & provide comparative data; improve internal controls; review staffing needs and funding.

Resources: Business Manager 160 hrs.; Departments 50 hrs.

Other direct costs: none.

Y1 task: Administer guest and residential revenue streams; facilitate facility leases & rentals, including special events, nightly lodging and apartments, golf course.

Resources: Business Manager 650 hrs.; Curator of Ed 96 hrs; AED 180 hrs.

Other direct costs: \$500 printing & postage.

Y2 task: Work with department heads to review operational needs and costs; circulate a monthly ledger & provide comparative data; improve internal controls; review staffing needs and funding.

Resources: Business Manager 160 hrs.; Departments 50 hrs.

Other direct costs: none.

Y2 task: Administer guest and residential revenue streams; facilitate facility leases & rentals, including special events, nightly lodging and apartments, golf course.

Resources: Business Manager 550 hrs; Curator of Ed 96 hrs; AED 180 hrs.

Other direct costs: \$500 printing & postage.

Y3 task: Work with department heads to review operational needs and costs; circulate a monthly ledger & provide comparative data; improve internal controls; review staffing needs and funding.

Resources: Business Manager 160 hrs.; Departments 50 hrs.

Other direct costs: none.

Y3 task: Administer guest and residential revenue streams; facilitate facility leases & rentals, including special events, nightly lodging and apartments, golf course.

Resources: Business Manager 550 hrs; Curator of Ed 96 hrs; AED 180 hrs.

Other direct costs: \$500 printing & postage.

Goal 2: Build organizational capacity for responsible stewardship.
(SF-1, SF-2, SF-4, SF-5, SF-6)

Objective 2a: Expand recruitment and retention of volunteer docents, gardeners, in gift shop, library and other capacities.

Y1 task: Develop a volunteer recruitment program coordinated through Assistant to the ED, Business Manager and Curator of Ed. Promote volunteer opportunities on website, at regional events and through social networks.

Resources: AED 160 hrs.; Business Manager 160 hrs.; Curator Ed. 160 hrs.

Other direct costs: \$1500 (printing and postage).

Y2 task: Advance volunteer recruitment coordinated through Assistant to the ED, Business Manager and Curator of Ed. Promote volunteer opportunities on website, at regional events and through social networks.

Resources: AED 160 hrs.; Business Manager 160 hrs.; Curator Ed. 160 hrs.

Other direct costs: \$1500 (printing and postage).

Y3 task: Advance volunteer recruitment coordinated through Assistant to the ED, Business Manager and Curator of Ed. Promote volunteer opportunities on website, at regional events and through social networks.

Resources: AED 160 hrs.; Business Manager 160 hrs.; Curator Ed. 160 hrs.

Other direct costs: \$1500 (printing and postage).

Objective 2b: Support professional development for paid and volunteer staff (see also B&G 3b).

Y1 task: Identify and budget for mission-related conferences, workshops and training to advance holistic approach to KS&A of FT staff.

Resources: FT staff 200 hrs.

Other direct costs: \$3000 (fees and expenses).

Y2 task: Identify and budget for mission-related conferences, workshops and training to advance holistic approach to KS&A of FT staff.

Resources: FT staff 200 hrs.

Other direct costs: \$3000 (fees and expenses).

Y3 task: Identify and budget for mission-related conferences, workshops and training to advance holistic approach to KS&A of FT staff.

Resources: FT staff 200 hrs.

Other direct costs: \$3000 (fees and expenses).

Objective 2c: Systematize HR functions of the organization.

Y1 Task: Create orientation program for new hires, including mentor relationships.

Resources: ED 5 hrs.

Other direct costs: none.

Y1 task: Review and revise employee handbook as needed.

Resources: ED 10 hrs.

Other direct costs: none

Y1 task: Review, revise and implement annual review process.

Resources: ED 10 hrs.

Other direct costs: none

Y1 task: Review, revise and implement assignments and reporting relationships.

Resources: ED 20 hrs.

Other direct costs: none.

Y3 task: Define and recruit part-time HR officer.

Resources: ED 15 hrs.; Salary cost \$20,000.

Other direct costs: \$800 office equipment.

Goal 3: Engage residents and guests as stakeholders in stewardship mission. (SF-1, SF-2, SF-4, SF-5, SF-6).

Objective 3a: Promote membership and volunteerism among guests and residents.

Y1 task: Ensure guided tours are available to all lodgers. Promote membership opportunities during intake and check-out.

Resources: AED, Receptionists & Business Manager 20 hrs.

Other direct costs: none.

Y1 task: Promote volunteer opportunities among residents.

Resources: AED & Business Manager 20 hrs.

Other direct costs: \$25 (printing).

Y1 task: Organize volunteer recognition event(s).

Resources: AED & Business Manager 30 hrs.

Other direct costs: \$400.

Y1 task: Articulate residential rules and procedures that emphasize advantages and responsibilities of life in a National Historic Landmark. Screen prospective tenants according to compatibility with rules.

Resources: Business Manager 20 hrs.; ED 20 hrs.

Other direct costs: \$160 (background checking).

Y2 task: Ensure guided tours are available to all lodgers. Promote membership opportunities during intake and check-out.
Resources: AED, Receptionists & Business Manager 20 hrs.
Other direct costs: none.

Y2 task: Promote volunteer opportunities among residents.
Resources: AED & Business Manager 20 hrs.
Other direct costs: \$25 (printing).

Y2 task: Organize volunteer recognition event(s).
Resources: AED & Business Manager 30 hrs.
Other direct costs: \$400.

Y2 task: Articulate residential rules and procedures that emphasize advantages and responsibilities of life in a National Historic Landmark. Screen prospective tenants according to compatibility with rules.
Resources: Business Manager 20 hrs.; ED 20 hrs.
Other direct costs: \$160 (background checking).

Y3 task: Ensure guided tours are available to all lodgers. Promote membership opportunities during intake and check-out.
Resources: AED, Receptionists & Business Manager 20 hrs.
Other direct costs: none.

Y3 task: Promote volunteer opportunities among residents.
Resources: AED & Business Manager 20 hrs.
Other direct costs: \$25 (printing).

Y3 task: Organize volunteer recognition event(s).
Resources: AED & Business Manager 30 hrs.
Other direct costs: \$400.

Y3 task: Articulate residential rules and procedures that emphasize advantages and responsibilities of life in a National Historic Landmark. Screen prospective tenants according to compatibility with rules.
Resources: Business Manager 20 hrs.; ED 20 hrs.
Other direct costs: \$160 (background checking).

Buildings & Grounds – FY17 – FY19

Goal 1: Preserve the building and site as a National Historic Landmark. (SF-1, SF-2, SF-3, SF-4, SF-5, SF-6).

Objective 1a: Maintenance and repair aligned with the Secretary of the Interior’s Standards for the Treatment of Historic Properties.

Y1 task: Commission a building envelope condition assessment.
Resources: DBG 50 hrs.; PLNYS grant \$8,000.
Other direct costs: \$15,000 (fees).

Y2 task: Evaluate assessment and determine a proper path of corrective action based on structural safety and integrity. Develop scope of work and obtain quotes from qualified contractors.
Resources: DBG 60 hrs.; ED 30 hrs.

Y2 task: Enact specified and necessary repair identified in the assessment.
Resources: DBG 1000 hrs.; B&G staff: 1500 hrs.
Other direct costs: TBD.

Y3 task: Enact specified and necessary repair identified in the assessment.
Resources: DBG 1000 hrs.; B&G staff: 1500 hrs.
Other direct costs: TBD.

Objective 1b: Maintain, repair and preserve building exterior.

Y1 task: Remove all vines climbing on the walls.
Resources: B&G staff: 20 hrs.
Other direct costs: \$275 (equipment rental).

Y1 task: Repair deteriorated gutters.
Resources: B&G staff 50 hrs.
Other direct costs: \$500 (materials & supplies).

Y1 task: Prep and paint fire escapes to conform to building code.
Resources: B&G staff 150 hrs.
Other direct costs: \$1250 (materials, equipment).

Y1 task: Repair, prep and paint porches and doors as required.
Resources: B&G staff 300 hrs.
Other direct costs: \$500 (supplies).

Y1 task: Repair and installation of storm windows and screens.
Resources: B&G staff 250 hrs.
Other direct costs: \$500 (materials & supplies).

Y1 task: Repair of deteriorated basement windows, frames and masonry openings.

Resources: B&G staff 150 hrs.

Other direct costs: \$500 (materials & supplies).

Y2 tasks: Prep and paint fire escapes to conform to building code.

Resources: B&G staff 150 hrs.

Other direct costs: \$1250 (materials, equipment).

Y2 task: Repair, prep and paint porches and doors as required.

Resources: B&G staff 300 hrs.

Other direct costs: \$500 (supplies).

Y2 task: Repair and installation of storm windows and screens.

Resources: B&G staff 250 hrs.

Other direct costs: \$500 (materials & supplies).

Y2 task: Repair of deteriorated basement windows, frames and masonry openings.

Resources: B&G staff 150 hrs.

Other direct costs: \$500 (materials & supplies).

Y3 task: Repair of deteriorated basement windows, frames and masonry openings.

Resources: B&G staff 150 hrs.

Other direct costs: \$500 (materials & supplies).

Y3 task: Repair, prep and paint porches and doors as required.

Resources: B&G staff 300 hrs.

Other direct costs: \$500 (supplies).

Y3 task: Repair and installation of storm windows and screens.

Resources: B&G staff 250 hrs.

Other direct costs: \$500 (materials & supplies).

Objective 1c: Maintain, repair and preserve building interiors.

Y1 task: Daily monitoring and maintenance of mechanical and safety systems throughout the site.

Resources: B&G staff 450 hrs.

Other direct costs: \$1500 (materials & supplies).

Y1 task: Repair/restore deteriorating surfaces and finishes throughout common areas of the building.

Resources: B&G staff 750 hrs.

Other direct costs: \$1,500.

Y1 task: Repair and maintenance of apartments and guestrooms.

Resources: B&G staff 1000 hrs.

Other direct costs: \$5,000.

Y2 task: Daily monitoring and maintenance of mechanical and safety systems throughout the site.

Resources: B&G staff 450 hrs.

Other direct costs: \$1500.

Y2 task: Repair/restore deteriorating surfaces and finishes throughout common areas of the building.

Resources: B&G staff 750 hrs.

Other direct costs: \$1,500.

Y2 task: Repair and maintenance of apartments and guestrooms.

Resources: B&G staff 1000 hrs.

Other direct costs: \$5,000.

Y3 task: Daily monitoring and maintenance of mechanical and safety systems throughout the site.

Resources: B&G staff 450 hrs.

Other direct costs: \$1500.

Y3 task: Repair/restore deteriorating surfaces and finishes throughout common areas of the building.

Resources: B&G staff 750 hrs.

Other direct costs: \$1,500.

Y3 task: Repair and maintenance of apartments and guestrooms.

Resources: B&G staff 1000 hrs.

Other direct costs: \$5,000.

Goal 2: Improve security of the buildings and collections; achieve professional standards for historic sites.

(SF-1, SF-2, SF-3, SF-4, SF-5, SF-6)

Objective 2a: Improve security staffing.

Y1 task: Re-align schedule between day and night staff and security guards to ensure continual monitoring.

Resources: DBG 10 hrs.; Business Manager 5 hrs.

Y2 task: Add PT security position and recruit qualified personnel.

Resources: DBG 15 hrs.; Watchpersons 38 additional hrs.

Objective 2b: Improve security systems/controls.

Y2 task: Install electronic locks on all perimeter doors.

Resources: B&G staff 80 hrs.

Other direct costs: \$12,000 (equipment).

Y3 task: Install electronic locks on all perimeter doors.
Resources: B&G staff 80 hrs.
Other direct costs: \$13,000 (equipment).

Y3 task: Install additional cameras to existing monitor system.
Resources: B&G staff: 120 hrs.
Other direct costs: \$22,000 (equipment).

Goal 3: Build organizational capacity for historic preservation.
(SF-1, SF-2, SF-3, SF-5, SF-6)

Objective 3a: Re-structure Lawn and Garden staff.

Y1 task: Create a full time horticultural position.
Resources: DBG 15 hrs.; New staff position 2000 hrs.
Cost: *position deferred*.

Y1 task: Support volunteer-run heirloom vegetable/herb garden.
Resources: DBG 200 hrs.
Other direct costs: \$500 (supplies).

Y2 task: Develop and mentor summer horticulture internship program with regional colleges.
Resources: DBG 32 hrs.; ED 5 hrs.; Curator of Ed. 16 hrs.
Other direct costs: \$500.00 stipend.

Y2 task: Support volunteer-run heirloom vegetable/herb garden.
Resources: DBG 200 hrs.
Other direct costs: \$500 (supplies).

Y3 task: Develop and mentor summer horticulture internship program with regional colleges.
Resources: DBG 32 hrs.; ED 5 hrs.; Curator of Ed. 16 hrs.
Other direct costs: \$500.00 stipend.

Y3 task: Support volunteer-run heirloom vegetable/herb garden.
Resources: DBG 200 hrs.
Other direct costs: \$500 (supplies).

Objective 3b: Support and advance professional KSAs for historic preservation.

Y1 task: Identify relevant, regional conferences, classes and seminars (organizations, schools, NPS).
Resources: DBG 20 hrs.
Other direct costs: none.

Y1 task: Schedule staff attendance of PD activities.
Resources: B&G staff 40 hrs.
Other direct costs: \$1000.

Y2 task: Schedule staff attendance of PD activities.
Resources: B&G staff 40 hrs.
Other direct costs: \$1000

Y3 task: Schedule staff attendance of PD activities.
Resources: B&G staff 40 hrs.
Other direct costs: \$1000.

Fundraising & Institutional Advancement – FY17 – FY19

Goal 1: Engage Board of Trustees in all aspects of development & fundraising.
(SF-2, SF-5).

Objective 1a: Constitute a Board Committee to guide policy, coordinate Trustee ambassadorship, and build stakeholder participation in financial support.

Y1 task: Cultivate Trustee participation and convene Committee; articulate Committee role and responsibility; participate in current year projects (i.e. membership, annual campaigns).
Resources: ED and Board Committee.

Y2 task: Analyze prior year projects and align current year with growth metrics.
Resources: ED and Board Committee.

Y3 task: Analyze prior year projects and align current year with growth metrics.
Resources: ED and Board Committee.

Objective 1b: Plan and implement annual giving campaign (see also Marketing Goal 3).

Y1 task: Identify an expanded base of support, including individual, foundation and corporate donors.
Resources: ED and Board Committee.

Y1 task: Draft/send compelling appeal letter highlighting key works of the organization and key needs for the coming year.
Resources: ED and Board Committee.

Y2 task: Identify an expanded base of support, including individual, foundation and corporate donors.
Resources: ED and Board Committee.

Y2 task: Draft/send compelling appeal letter highlighting key works of the organization and key needs for the coming year.
Resources: ED and Board Committee.

Y3 task: Identify an expanded base of support, including individual, foundation and corporate donors.
Resources: ED and Board Committee.

Y3 task: Draft/send compelling appeal letter highlighting key works of the organization and key needs for the coming year.
Resources: ED and Board Committee.

Objective 1c: Develop a capital building campaign.

Y1 task: Conduct a needs analysis and scope of capital project(s). Define necessary Trustee engagement in campaign. Identify major gift criteria and participants (the pyramid).
Resources: ED and Board Committee.
Direct costs: \$3500 design and printing campaign brochure.

Y1 task: Identify, solicit and secure pledges from one or more major foundations and/or individuals.
Resources: ED and Board Committee.

Y1 task: Identify, solicit and secure pledges from two or more other foundations and/or individuals.
Resources: ED and Board Committee.

Y2 task: Identify, solicit and secure pledges from two or more major foundations and/or individuals.
Resources: ED, DO and Board Committee.

Y2 task: Identify, solicit and secure pledges from five or more other foundations and/or individuals.
Resources: ED, DO and Board Committee.

Y3 task: Identify, solicit and secure pledges from two or more major foundations and/or individuals.
Resources: ED, DO and Board Committee.

Y3 task: Identify, solicit and secure pledges from five or more other foundations and/or individuals.
Resources: ED, DO and Board Committee.

Goal 2: Improve organizational staff competency.
(SF-1, SF-2, SF-5)

Objective 2a: Identify requirements and recruit development officer.

Task Y1: Budget salary, define job, announce search, and interview candidates.
Resources: ED, Board Committee,
Metric: Hire competent Development Officer.

Task Y2: Establish development as an operational center and liaison to Board committee.

Resources: DO, ED, Board Committee.

Metric: Successful coordination of annual and capital campaigns.

Task Y2: Engage staff performance according to metrics (e.g. Objective 1b and 1c) for implementation.

Resources: DO, ED, Board Committee.

Metric: Successful coordination of annual and capital campaigns.

Task Y3: Engage staff performance according to ongoing plan metrics.

Resources: DO, ED, Board Committee.

Metric: Successful coordination of annual and capital campaigns.

Goal 3: Improve endowment management.

(SF-2, SF-4, SF-5, SF-6)

Objective 3a: Coordinate needs analysis with reasonable fundraising growth.

Task Y1: Evaluate funding targets for giving campaigns and % reallocation to Endowment Fund.

Resources: DO, ED, Board Committee.

Task Y2: Evaluate funding targets for giving campaigns and % reallocation to Endowment Fund.

Resources: DO, ED, Board Committee.

Task Y3: Evaluate funding targets for giving campaigns and % reallocation to Endowment Fund.

Resources: DO, ED, Board Committee.

Objective 3b: Integrate membership development with planned giving.

Task Y1: Articulate membership relationship to organizational stewardship. Analyze and set targets for membership growth.

Resources: DO, ED with Board.

Task Y2: Evaluate and set annual target for membership growth.

Resources: DO, ED.

Task Y3: Evaluate and set annual target for membership growth.

Resources: DO, ED.

Resources, *Fundraising & Institutional Advancement*