

INSTITUTIONAL PLAN 2017 - 2023

**Culture and Heritage Museums
York County, South Carolina**

*Approved by the Culture and Heritage Commission
November 10th, 2016*

OUR MISSION:

To communicate and preserve the natural and cultural histories of the Carolina Piedmont, inspiring a lifetime of learning.

OUR VISION:

To create a community that greatly values natural, historical, and cultural resources.

WE VALUE...

Authenticity: *We ensure that the knowledge that we share is accurate and supported through credible documentation or eyewitness accounts.*

Professionalism: *We adhere to best practices of the museum field in the care of resources under our stewardship.*

Meaningful Visitor Experiences: *We strive to create memorable experiences enabling those we serve to walk away from our museums not only with new information but with inspiration that they will carry with them throughout their lives.*

Respect for Those We Represent: *As a cultural museum we tell the story of people from various backgrounds and life experiences both past and present. We have an obligation to tell their stories in a fair and balanced manner that fosters greater understanding of their unique perspectives.*

Respect for Our Natural World: *As a natural history museum, we have a responsibility to show respect for the natural world and to lead by example.*

Transparency: *We ensure our organizational meetings, documents, and records beyond those that pertain to our legal requirements or breach the trust of our donors are available to the public.*

Stewardship: *We recognize that all of our assets are held on behalf of the public good and that it is our responsibility to ensure that they are used wisely. We are committed to maximizing these assets, including public and private funding, in a manner that effectively supports our mission.*

Donor Rights: *We believe all donors should be valued and informed. Promises should be delivered and expectations of confidentiality should be met to the fullest extent of the law.*

OUR SITES:

We are a family of museums in York County, South Carolina, which includes Historic Brattonsville, the Museum of York County, Main Street Children's Museum, and the McCelvey Campus, which consists of the Historical Center of York County, the Southern Revolutionary War Institute and the McCelvey School, home to the Lowry Family Theater.

Each of our sites serves a distinct role in fulfilling the institution's mission. Thereby, each site's mission reflects its unique resources and programming scope.

Historic Brattonsville:

The mission of Historic Brattonsville is to preserve and present the history of the Carolina Piedmont and this Revolutionary War site as portrayed through the structures, landscape, and stories of the Brattonsville community.

Museum of York County:

The mission of the Museum of York County is to enhance understanding of our world by collecting and preserving the art and natural history of the Carolina Piedmont, communicating regional themes and their broader global connections.

Main Street Children's Museum:

The mission of the Main Street Children's Museum is to prepare young learners and their families for the future, by providing positive learning through creative play in a unique environment inspired by the art of Vernon Grant.

Historical Center of York County:

The mission of the Historical Center of York County is to preserve the heritage of York County and the Carolina Piedmont through collection and care of its significant art, objects and archival material while providing opportunities for research and learning.

Lowry Family Theater:

The mission of the Lowry Family Theater is to present the unique heritage of the Carolina Piedmont through the performing arts while maintaining a quality venue for community enrichment.

Introduction

The Culture and Heritage Museums system began in 1949 as the Children's Nature Museum and expanded its role in 1997 when it merged with the York County Historical Commission which first opened Historic Brattonsville in 1976. We are a 501c3 nonprofit organization governed by the Culture and Heritage Commission of York County which is established by Ordinance of the York County Government. The seven voting Commissioners are appointed by the York County Council and represent each of the seven districts of the county. In addition, two ex-officio members are chosen by the County Council to participate in discussion and act in an advisory capacity. All Culture and Heritage Commission meetings are announced to the media and are open to the public. Our governing documents, code of ethics, financial information, and meeting minutes are posted on the governance page of our website. The Culture and Heritage Museums employ approximately sixty-five employees whose experience and dedication serve as a major strength of the organization.

Since 2011 broad-based support for the museums has grown. At the end of FY 2016 annual overall attendance had increased by 34% since FY 2012 (the first full year of operation of the Main Street Children's Museum) with each year seeing a stronger growth rate than the year before. Important projects during that time span have included a major planetarium renovation, creation of an interpretive trail around the Huck's Defeat Battlefield, replacement of failing roofs over both the Museum of York County and the McCelvey School, and the renovation of the McCelvey School Annex into a state of the art facility for collections and archival preservation. In 2014 an African-American history program received an award from the South Carolina African American Heritage Commission while an exhibition which tested interest in Ice Age megafauna of the Carolina Piedmont received awards from both the South Carolina Federation of Museums and the Southeastern Museum Conference. New programs like "Countdown to Kindergarten" and "Spirits and Stories" have greatly exceeded visitation expectations while old favorites like "Christmas Candlelight" and "Children's Day on the Farm" have set new records for single-day attendance.

Process

Over the past four years the Culture and Heritage Commission, working with the museum staff, has laid important groundwork for the future of the museums. Following up on a return to a core mission focus on the Carolina Piedmont in 2011, the commission has stated a general vision, affirmed organizational values, and created site-specific mission statements that define the role of each site in working toward the overall mission. In February of 2013, the commission approved Strategic Objectives and Initiatives to guide the endeavors of the organization. These were revised in October of 2014 and were at the heart of the Institutional Plan approved in February of 2015. In December of 2015, the Culture and Heritage Museums decided to take steps to facilitate broader stakeholder participation in review and further refinement of the plan.

The first step in the review process was to reformat the plan to focus on strategies more than tactical initiatives. The reformatted plan also more clearly articulates the goals that are specific to each site. In addition it allowed for the incorporation of goals addressing financial sustainability and community feedback. The review of the plan started internally with the heads of the nine departments and the executive director meeting to review the plan and reformat the document. During this first step which continued through January of 2016, the department heads independently sought input from their respective staff members. Once there was agreement on an initial draft among the various

departments, staff meetings were held at the sites to give an opportunity for all employees to offer input on the plan in a formal setting. Concurrent with the staff meetings, meetings were held with individual stakeholders from groups identified by both staff and commissioners. In the period leading up to the Institutional Planning Review Retreat in April, there were a total of thirty-eight meetings with individuals or stakeholder groups including discussions of the plan with each of the nine commissioners serving on the CHM governing board.

Following the stakeholder and staff meetings, the document was further refined for presentation and formal review at the Institutional Planning Retreat. While there were some minor changes in response to the broader input, the meetings with staff and stakeholders indicated overwhelming affirmation of the strategic direction of the organization as represented in the document. The updated document was sent to the commissioners in advance of the planning retreat. At the retreat, the commissioners, department heads, and key staff reviewed and thoroughly discussed the organizational priorities, goals, and strategies. Once again there was strong consensus in support of the plan as presented. As a result of the meeting further minor revisions were made and a draft prepared for presentation at the public stakeholder meetings. Public meetings were held at each of our four sites in June and July of 2016 with each meeting focusing on the topics in the plan most closely related to the host site. The meetings were open to the general public and announced to local media outlets. In addition, invitations were sent to members and an extensive list of community partners and stakeholders. The public meetings at Historic Brattonsville and the Museum of York County also provided an opportunity to present more specific information on our two major capital endeavors and to communicate that opportunities for additional community input would be offered during upcoming master planning and exhibit design phases of the respective projects. In addition to the public meetings, a brief overview of the Institutional Plan was given at three of the official York County Council meetings in June, July, and August.

Building on the plan approved in February of 2015, the Institutional Plan as presented here is the culmination of initial reformatting, staff and stakeholder input, the Commission's planning retreat, the public meetings, and additional stakeholder meetings. The input from the community demonstrated very strong support for the priorities, goals, and strategies presented. In addition, that input helped inform the final direction of action items, costs, and timelines. The current iteration was formally approved by the Commissioners at their meeting held on November 10th, 2016.

The Institutional Plan is intended to be a living document. We will continue to monitor community response and stakeholder reaction as well as progress towards our goals and any changing needs of the organization including exceeding or falling short of revenue projections. This information will be incorporated into an annual report from the staff to the Commission for incorporation into a formal review of the plan each fall. At that time, the commission may adopt any further revisions from needs or opportunities that have arisen during the year.

PRIORITIES

Guided by our mission, the Culture and Heritage Museums strive to inspire audiences to explore and discover their place in the world - to better understand their past, to enrich their lives today, and shape their futures.

This plan encompasses the goals and strategies to accomplish this endeavor in measurable ways – by effectively dedicating our collective resources and services; reinforcing our ongoing commitment to excellence and relevance in research, collections, and programming; and reflecting the integral value we place in the public’s trust and support of our efforts.

Three priorities reflect the core principles inherent in our mission, vision and values. Serving as the framework for our institutional plan, these priorities define and align our collective efforts and guide our paths forward.

PRIORITY I

Create meaningful, engaging, and authentic visitor experiences.

PRIORITY II

Strengthen collections and intellectual resources critical to the preservation and appreciation of the Carolina Piedmont’s natural and cultural heritage.

PRIORITY III

Increase capacity and resources to ensure quality and sustainability of facilities, operations, and programming.

PRIORITY I: Create meaningful, engaging, and authentic visitor experiences and learning opportunities.

GOAL I: Position the Museum of York County as the regional hub for Carolina Piedmont nature-based learning experiences and research opportunities.

STRATEGY 1: Expand resources and opportunities to present dynamic, interactive, changing exhibitions and public programs.

Site: MYCO

Project Coordinator: Cate Crane

Target Completion Date: January 2020

Estimated Total New Costs: \$140,000 annually by 2020 plus an initial cost of \$9,500

Sources of Funding: Increase in exhibit and program Sponsorships, grants, and contributions; projected growth in annual earned income; reallocation of existing budget

Required Resources: Current and new CHM staff; exhibits, volunteers

Measures of Success:

- Sustain annual increase in membership and attendance
- Site is adequately staffed to handle growth in visitation and exhibits
- Continued positive evaluations in both exhibits and programs.

Action Steps and Target Completion Dates:

- Plan and fund expansion of changing exhibition and programming capacity (July 2017).
- Change one PT interpretive position to full-time (July 2017).
- Add one FTE interpretive staff person (July 2019).
- Add one FTE exhibits preparator (July 2018).
- Track public response (ongoing).

STRATEGY 2: Develop and implement a plan to include facility renovations and ensure permanent exhibitions are mission based.

Site: MYCO

Project Coordinator: Teresa Armour

Target Completion Date: June 2019

Estimated Total New Costs: \$2,550,000

Sources of Funding: CHC Capital Projects Fund; Existing budget

Required Resources: Current CHM staff; community advisors; design/fabrication firms; contracted Services

Measures of Success:

- Complete planned renovations to facility and grounds.
- Open new permanent exhibit hall highlighting prehistory of the Carolina Piedmont.
- Positive community response to improvements demonstrated through surveys and attendance growth.

Action Steps and Target Completion Dates:

- Plan scope, budget and timeline for renovations to facility and grounds (July 2017).
- Select design firm to work with staff to complete Phase One (planning & design) of new, mission-based permanent exhibition (March 2018).
- Complete planned renovations to facilities and grounds (June 2019).
- Select fabrication team to work with staff to implement Phase Two (construction & installation) of new, mission-based permanent exhibition (June 2019).
- Track public response (ongoing).

STRATEGY 3: Engage local stakeholders and municipal agencies in discussing the potential for a new dedicated location to showcase the Vernon Grant collection.

Site: Museum of York County

Project Coordinator: Cate Crane

Target Completion Date: December 2017

Estimated Total new Costs: None

Sources of Funding: Existing budget

Required Resources: Current CHM staff, VG committee, partners, community advisors, volunteers, City of Rock Hill and York County officials

Measure of Success:

- Create plan for the exhibition of Vernon Grant artwork that is supported by key stakeholders as well as the community at large.

Action Steps and Target Completion Dates:

- Identify potential partners within Rock Hill community to host gallery space for exhibition of Vernon Grant collection (August 2017).
- Work with Vernon Grant Committee to gain feedback on potential partnerships and locations (ongoing throughout process).
- Determine feasibility for short and long-term use of potential spaces, including evaluation of available resources to ensure protection of and access to artwork (October 2017).
- Create fiscally responsible plan that has been vetted with the community, including a timeline, funding needs and strategy for implementation (December 2017).

STRATEGY 4: Develop site-specific brand identity that accentuates the clarified role of MYCO as a natural history museum.

Site: Museum of York County

Project Coordinator: Richard Campbell

Target Completion Date: June 2018

Estimated Total New Costs: \$20,000 (Branding)

Sources of Funding: fund balance, existing budget

Required Resources: Branding agency, current CHM staff, community, audiences

Measures of Success:

- Approved strategic branding brief.
- Approved creative brief.
- New marketing plan incorporating the new brand identity.

Action Steps and Target Completion Dates:

- Clarify identity for MYCO that reflects organizational strengths and community support (April 2017).
- Secure funding and hire a branding agency (August 2017).
- Provide oversight and cooperation as branding agency completes the branding project (June 2018).
- Implement a marketing plan that incorporates new brand identity (August 2018).

GOAL II: Enhance Historic Brattonsville's role as a regional destination for heritage education and tourism.

STRATEGY 1: Implement the Historic Brattonsville Interpretive Plan to address preservation needs, to adhere to Secretary of the Interior's standards and to support a broader interpretive scope and expansion of living history settings.

Site: Historic Brattonsville

Project Coordinators: Carey Tilley, Kevin Lynch

Target Completion Date: July 2020 (All Phases)

Estimated Total New Costs: \$3,046,566 (an additional \$1,035,000 is already in the FY 2017 Budget)

Sources of Funding: CHC Capital Projects Fund, R.H. Morrison Foundation, existing budget

Required Resources: staff, master planners, architects and engineers, contractors, partners, and volunteers

Measures of Success:

- Interpretive areas are historically accurate and authentic as defined in Master Plan.
- Restoration and preservation of original structures and landscape comply with applicable Secretary of the Interior preservation standards.
- Each phase of the Interpretive Plan is completed and programming underway.
- Positive community response to improvements is demonstrated through surveys and attendance growth.

Action Steps and Target Completion Dates:

- Submit nomination for extension of National Register Historic District boundaries (June 2017).
- Conduct archaeological assessment of areas beyond National Register District boundaries designated for new construction (May 2017).
- Staff/consultants complete Master Site Plan; revise timeline and cost estimates (June 2017).
- Staff/consultants complete Furnishings Plans for Brick House, Plantation, and Yeoman Farm (April 2019).
- Complete remaining A/E work and restoration of the Bratton Brick House (June 2017).
- Construct the 1780 Farm Interpretive Area (April 2018).
- Relocate identified non-original structures to the 1850's Yeoman Farm interpretive area (January 2020).
- Identify and address preservation needs of the 1850's Plantation interpretive area (Historic Site) including removal of non-original structures (June 2019).
- Complete education programming area (March 2020).
- Finalize landscaping, furnishing, exhibits, signage, and programming plans for the three new interpretive areas and education programming area (June 2020).
- Open Interpretive Areas in successive phases with specific marketing plans for each (September 2020).
- Construct and open new visitor center, support facilities, parking areas and visitor amenities (December 2020).
- Track public response (ongoing).

STRATEGY 2: Plan, implement and staff new programming to effectively utilize site improvements.

Site: Historic Brattonsville

Project Coordinator: Kevin Lynch

Target Completion Date: January 2020

Estimated Total New Costs: \$141,000 annually by 2020 plus an initial cost of \$16,000

Sources of Funding: Projected growth in annual earned income and reallocation of existing budget

Required Resources: Current and new Staff, volunteers, furnishings, exhibits, livestock

Measures of Success:

- New programming utilizes capital improvements and meets the objectives of the Interpretive Plan.
- Site is adequately staffed to provide quality interactive experiences in both old and new interpretive areas.
- There is positive visitor reaction to the new interpretive plan as demonstrated through increased attendance and survey responses.

Action Steps and Target Completion Dates:

- Conduct research and create interpretive materials for each of the three planned new interpretive areas (October 2019).
- Plan interpretive exhibits and video documentary for the Brick House (March 2018).
- Acquire needed livestock for the 1780 and Yeoman farms (March 2020).
- Adapt current and create new educational programs to take advantage of new interpretive areas (February 2020).
- Refocus reproduction clothing collection to new interpretive time period (March 2020).
- Shift program emphasis from special events to daily living history activities (June 2020).
- Add three full-time equivalent interpreters to effectively staff new areas (July 2019).
- Track public response (ongoing).

STRATEGY 3: Strengthen volunteer program to support daily living history programming and enhance visitor's immersive experience.

Site: Historic Brattonsville

Project Coordinator: Windy Cole

Target Completion Date: Ongoing

Estimated Total New Costs: \$2000

Sources of Funding: Existing budget; reallocation of existing budget

Required Resources: Current CHM staff, volunteers

Measures of Success:

- Increase total volunteer hours by 10% each of the next five years.
- Regular utilization of volunteers in daily programming.

Action Steps and Target Completion Dates:

- Develop and schedule monthly trainings for volunteers at Historic Brattonsville (March 2017).
- Increase the volunteer base through increased recruitment and recognition efforts (ongoing).
- Match volunteer talents to programming opportunities (ongoing).
- Train staff on working with volunteers (August 2017 and ongoing).
- Provide opportunities for meaningful volunteer feedback (ongoing).

STRATEGY 4: Develop a strong brand identity that draws audiences throughout the southeastern United States.

Site: Historic Brattonsville

Project Coordinator: Richard Campbell

Target Completion Date: June 2018

Estimated Total New Costs: \$20,000 (Branding)

Sources of Funding: Fund balance; existing budget

Required Resources: Branding agency; current CHM staff; community, audiences

Measures of Success:

- Approved strategic branding brief.
- Approved creative brief.
- New marketing plan incorporating the new brand identity.

Action Steps and Target Completion Dates:

- Secure funding and hire a branding agency (August 2017).
- Provide oversight and cooperation as branding agency completes the branding project (June 2018).
- Implement a marketing plan that incorporates new brand identity (August 2018).

GOAL III:

Strengthen the position of Main Street Children’s Museum as a community leader in early childhood education and creative learning experiences.

STRATEGY 1: Expand community-inspired partnerships and resources to further engage families in creative and educational opportunities for preschool children.

Site: Main Street Children’s Museum

Project Coordinator: Cate Crane

Target Completion Date: Ongoing

Estimated Total New Costs: \$1,000 annually by FYE 2019

Sources of Funding: Reallocation of existing budget

Required Resources: Staff, community partners

Measure of Success:

- New programs are supported through membership and attendance.

Action Steps and Target Completion Dates:

- Develop and implement new program streams to enhance parental engagement and creative play (March 2017).
- Continue to provide Exhibit department staff resources to enhance and maintain interactive exhibit areas (ongoing).
- Identify appropriate key community partners to discuss future programmatic opportunities and partnerships (April 2017 and ongoing).
- Coordinate offsite venues for existing Vernon Grant mini-exhibit, such as schools, libraries, community centers and events (February 2018).
- Track community participation and public response (ongoing).

STRATEGY 2: Maintain strong brand identity while increasing awareness within the community of the importance of early childhood education and creative play.

Site: Main Street Children’s Museum

Project Coordinator: Richard Campbell

Target Completion Date: June 2018

Estimated Total New Costs: \$20,000 (Branding)

Sources of Funding: Fund balance; existing budget

Required Resources: branding agency, current CHM staff, community, audiences

Measures of Success:

- Approved strategic branding brief.
- Approved creative brief.
- New marketing plan incorporating the new brand identity.

Action Steps and Target Completion Dates:

- Secure funding and hire a branding agency (August 2017).
- Provide oversight and cooperation as branding agency completes the branding project (June 2018).
- Implement a marketing plan that incorporates new brand identity (August 2018).

STRATEGY 3: Monitor growth and explore ways to address capacity issues that may result from continued strong rise in visitation.

Site: Main Street Children’s Museum

Project Coordinator: Cate Crane

Target Completion Date: Ongoing

Estimated Total New Costs: None

Sources of Funding: Existing budget

Required Resources: Current CHM staff, community members, local governmental officials

Measures of Success:

- Growth is successfully managed with visitor satisfaction remaining high.
- Due diligence is given to capacity issues and alternatives considered.

Action Steps and Target Completion Dates:

- Monitor growth annually including number of days per year the site is at capacity (each July).
- Seek formal input from visitors (ongoing).
- Engage community to explore new sites/ideas for the Main Street Children’s Museum (ongoing).
- Develop a list of potential new sites for the Main Street Children’s Museum including logistical challenges and estimated financial impact (as warranted by results of monitoring and projections of future growth).

GOAL IV: Expand the use of the McCelvey campus while promoting it as the regional historical center for Carolina Piedmont research, education and preservation of cultural resources.

STRATEGY 1: Unite the collective roles and services of McCelvey campus under one mission and develop a brand identity to communicate that mission

Site: McCelvey campus

Project Coordinator: Carey Tilley, Nancy Sambets

Target Completion Date: June 2018

Estimated Total New Costs: \$20,000 (Branding)

Sources of Funding: Fund balance; existing budget

Required Resources: Current CHM staff, stakeholders, branding agency

Measures of Success:

- New cohesive mission statement vetted in community and approved by CHM Board.
- Completed branding plan ready for launching.

Action Steps and Target Completion Dates:

- Continue to seek, document, and utilize stakeholder feedback (April 2017 and ongoing).
- Develop a singular mission statement that unites the activities on the McCelvey campus under the overall CHM mission with a focus on regional history (May 2017).
- Clarify the name of the McCelvey campus and its various components (April 2018).
- Evaluate programs, concerts and preservation activities to ensure alignment under one mission (May 2017 and ongoing).
- Secure funding to hire consultants to develop a brand identity for the McCelvey campus based on the new mission statement (August 2017).
- Provide oversight and cooperation as branding agency completes the branding project (June 2018).
- Implement a marketing plan that incorporates new brand identity (September 2018).

STRATEGY 2: Determine the future role of the McCelvey School building to potentially expand operational capacity and educational programming opportunities.

Site: McCelvey campus

Project Coordinator: Carey Tilley, Nancy Sambets

Target Completion Date: December 2017

Estimated Total New Costs: None

Sources of Funding: Existing budget

Required Resources: Current CHM staff, volunteers, stakeholders, York County representatives

Measure of Success:

- Development of a comprehensive usage plan for the McCelvey School building that has been vetted by stakeholders and target audience and approved by CHM Board.

Action Steps and Target Completion Dates:

- Create a comprehensive usage plan for McCelvey School building to include exhibits, programs, collections, and administrative services, including preliminary projected costs, timelines, staffing needs, building upgrades and maintenance (December 2017).
- Seek, record, and incorporate community input (October 2017).
- Continue to use the Lowry Family Theater and rental rooms as a venue for community enrichment (ongoing).

STRATEGY 3: Address preservation needs of the McCelvey School building.

Site: McCelvey campus

Project Coordinator: Carey Tilley, Richard Campbell

Target Completion Date: June 2020

Estimated Total New Costs: To be determined

Sources of Funding: Capital budget, fund balance, CHC Capital Projects Fund

Required Resources: Current CHM Staff, professional expertise, consultants, contractors

Measure of Success:

- Threats to the building have been mitigated.
- Major aesthetic issues have been addressed.
- Building is capable of effectively serving operational and programming goals.

Action Steps and Target Completion Dates:

- Evaluate preservation needs (June 2017).
- Develop a prioritized list of projects (June 2017).
- Develop a scope of work for each project (December 2017).
- Determine if projects can be handled internally or require external expertise (December 2017).
- Determine rough budget and phasing for projects (February 2018).
- Secure funding and appropriate approval (July 2019).
- Implement plans in a fiscally responsible manner (June 2020).

STRATEGY 4: Play a leadership role in initiating the Southern Campaign of the American Revolution (SOCA) National Heritage Area (NHA), also referred to as a National Heritage Corridor.

Site: McCelvey campus

Project Coordinator: Michael Scoggins

Target Completion Date: Three years following congressional approval

Estimated Total New Costs: \$660,000 by year three (plus \$240,000 In-Kind)¹

Sources of Funding: Federal NHA funding, matching funds generated through partnerships with other sites, municipalities, and CVB/Tourism boards; local, state, and private grants; private and corporate contributions; and reallocation of budgeted staff time

Required Resources: Congressional approval, current CHM staff, office space, and logistical support; contracted position; NPS cooperation; regional partnerships

Measures of Success:

- Acceptance of management plan by NPS/Congress and passage of Congressional legislation to create the SOCA NHA.
- Creation and implementation of a viable NHA Management Plan.

Action Steps and Target Completion Dates:

- Continue to work with existing partners (ongoing).
- Host a meeting of potential stakeholders to create enthusiasm and gain momentum (May 2017).
- Meet with elected Congressional officials or their staff to discuss moving the NHA proposal forward in Congress. (Congress must draft legislation authorizing and allocating funds for the designated coordinating entity (CHM) to create an NHA management plan) (July 2017).
- Once funding is authorized, hire a Program Coordinator to facilitate stakeholder cooperation, draft the Management Plan, promote the project and secure matching funds from private, corporate and governmental sponsors (target completion date is dependent on timing of Congressional approval).
- Working with local and regional stakeholders, create an NHA management plan within a three-year timetable (target completion date is dependent on timing of Congressional approval).
- Submit the completed management plan to the National Park Service for approval (three years after Congressional approval and award of funding). (Upon approval, NPS will submit the management plan to Congress for legislative action creating the NHA and funding it from the existing Congressional NHA budget.)

¹ The funding for the proposed National Heritage Area is not included in the current Financial Plan because Congressional Approval remains a prerequisite and the dates and timelines for funding are unknown. The legislation, if passed, would include new federal funding to develop a plan. This funding would be matched through solicitation of new external funds from benefitting partners and donors as well as in-kind contributions from partners, volunteers, and the CHM.

PRIORITY II: Strengthen collections and intellectual resources critical to the preservation and appreciation of the Carolina Piedmont's natural and cultural heritage.

GOAL I:

Continue building a collection of specimens, objects and archives representative of the Carolina Piedmont past and present.

STRATEGY 1: Create a Collections Plan to clearly define the scope of CHM collections and outline the mission-based acquisition of objects to strengthen focus on the Carolina Piedmont.

Site: Historic Brattonsville, McCelvey campus, Museum of York County

Project Coordinator: Latasha Richards

Target Completion Date: January 2018

Estimated Total New Costs: None

Sources of Funding: Existing budget

Required Resources: Current CHM staff; Collections Committee, Board

Measure of Success:

- A Collections Plan is drafted and reviewed by the Collections Committee and approved by the Culture & Heritage Commission.

Action Steps and Target Completion Dates:

- Determine directional framework for the Collections Plan (February 2017).
- Create a vision for all CHM collections by identifying key areas to collect and strategies for implementation (May 2017).
- Evaluate current collections to identify strengths and weaknesses (August 2017).
- Draft Collections Plan for review by key staff and Collections Committee (November 2017).
- Submit Plan to CHC for final review and approval (January 2018).
- Review Plan annually (Each January).

STRATEGY 2: Ensure that items in the collection are aligned with the organization's mission.

Site: McCelvey campus, Museum of York County, Historic Brattonsville

Project Coordinator: Latasha Richards

Target Completion Date: June 2018 (Ongoing)

Estimated Total New Costs: \$9,600 (for inventory consultant) in FYE 2018

Sources of Funding: Existing budget, designated fund balance account

Required Resources: external consultant, staff time

Measures of Success:

- All accessioned items in the Collections have been assigned a mission rating.
- All items at Historic Brattonsville have been properly classified and remaining accessioned items have been moved to a secure environment.
- Inventory of African Ethnographic Collection has been completed.
- Items that should be deaccessioned are identified and clear guidelines are followed in deaccession efforts.

Action Steps and Target Completion Dates:

- Improve intellectual and physical control over all registration records on paper and in PastPerfect (ongoing – evaluate progress quarterly).
- Assign a mission rating to all archival material, art, and historic objects in collections (January 2018).
- Classify items at Historic Brattonsville as living history, exhibit, or permanent collections and take steps to ensure appropriate use and care (Classification complete by March 2017, care is ongoing).
- Complete inventory of ethnographic collection using a consultant specializing in African Ethnographic material (September 2017).
- Create guidelines within existing policy for determining the process to deaccession non-mission related objects (March 2017).
- Utilize deaccessioning guidelines and collection management policy to deaccession items that are not related to the mission or are in poor condition and not viable candidates for conservation (ongoing as items for deaccession are identified)).

STRATEGY 3: Expand collections storage capacity and improve conditions to ensure long-term preservation and security of objects.

Site: McCelvey Campus, Museum of York County

Project Coordinator: Latasha Richards

Target Completion Date: June 2020

Estimated Total New Costs: \$112,500 (Fluid Preservation Facility)²

Sources of Funding: CHC Capital Projects Fund; existing York County McCelvey Annex Project (HVAC issues), existing budget, and reallocation of existing budget,

Required Resources: Current CHM staff; professional movers; supplies and equipment; A/E services, contracted services

Measures of Success:

- The Historical Center of York County's HVAC system is meeting all target ranges.
- All items slated for relocation to the Historical Center have been moved with their updated locations entered into their respective databases.
- Completion of the Fluid Preservation Facility at the Museum of York County that meets code-compliance.

Action Steps and Target Completion Dates:

- Evaluate preservation and security needs for continued collections storage use at the McCelvey Center and for Natural History storage at the Museum of York County (April 2017 and ongoing).
- Take steps to ensure the Collections Management Policy is followed in regards to appropriate use and care of all CHM collections (ongoing).
- Work with the County to resolve design issues with the HVAC system of the new facility to make sure it meets targeted humidity and temperature ranges as specified in original contract documents (June 2017).
- Move slated collections objects currently stored in the McCelvey Center and at the Cotton Factory to the Historical Center as soon as HVAC design issues are resolved (October 2017).
- Maximize storage space within the McCelvey Center for object collections and archives (January 2018 and ongoing).
- Maximize storage space at the Museum of York County for Natural History and temporary exhibit storage (March 2018 and ongoing).
- Refine cost estimates, create scope for design, and secure funding for designing and building a 900 square-foot stand-alone Fluid Preservation Facility on the property of the Museum of York County (December 2017).
- Select architect and engineer for design; complete design and construction documents (November 2018).
- Construct Fluid Preservation Facility according to fire code regulations (June 2019).

² Costs to ensure the HVAC system consistently performs within standard ranges are still to be determined. These costs would be paid from a balance held by York County Engineering from the original renovations funding.

GOAL II:

Expand opportunities and investment in professional development.

STRATEGY 1: Consider procedures to document institutional knowledge and experience.

Site: All CHM sites

Project Coordinator: Steve Fields

Target Completion Date: June 30, 2018

Estimated Total New Costs: None

Sources of Funding: Reallocation of the existing budget

Required Resources: Current CHM staff

Measures of Success:

- Establishment of a centralized location for institutional records.
- Creation of departmental standard Operating Procedures Manual.
- Development of an Emergency Succession Plan.
- Development of a digital and physical library for professional sources.
- Staff is well-versed in institutional policies and procedures.
- All new staff members receive institutional orientation.

Action Steps and Target Completion Dates:

- Establish a centralized location to backup/preserve institutional records related to organizational history, policies and procedures (January 2018).
- Create an updated Standard Operating Procedures manual for major departmental tasks (June 2018).
- Ensure regular review and revision of institutional policies and procedures (ongoing annually).
- Develop an Emergency Succession Plan to be used in the event of a temporary, unplanned absence of the executive director or any senior staff member (March 2018).
- Increase staff awareness of policies through institutional orientation and regular communications with departments (ongoing).
- Develop a digital and physical library of research papers and related articles from professional resources that correlate to the management of the Culture & Heritage Museums and its collections (June 2017).

STRATEGY 2: Value and pursue staff development opportunities.

Site: All CHM Sites

Project Coordinator: Carey Tilley

Target Completion Date: Ongoing

Estimated Total New Costs: \$10,000 annually

Sources of Funding: Reallocation of existing budget

Required Resources: Current CHM staff; conference and training opportunities

Measures of Success:

- Staff training and associated line items are increased in a fiscally responsible manner for each Department.
- Each Manager identifies meaningful opportunities for staff development for their department that are within the budgetary limitations.

Action Steps and Target Completion Dates:

- Identify and Prioritize critical areas in each department that could be strengthened by additional training (December 2017, revisited annually prior to budgeting process).
- Identify both external and internal training opportunities that address the identified critical areas (January 2018, revisited annually prior to budgeting process).
- Plan for training time in work schedules (each January).
- Invest in current staff by providing funding for growth opportunities (annually during budgeting process).
- Value and recognize experience, improvement, and new training when considering advancement opportunities (ongoing).
- Explore ways to create needed intermediate positions with higher grade and level of responsibility that fit within budgetary and policy limitations (initially March 2017 and then ongoing).

PRIORITY III: Increase capacity and resources to ensure quality and sustainability of facilities, operations, and programming.

GOAL I:

Broaden funding resources to supplement County support and allow for programmatic growth.

STRATEGY 1: Strengthen relationships with key stakeholders, donors, volunteers, and community partners.

Site: All CHM sites

Project Coordinator: Windy Cole

Target Completion Date: Ongoing

Estimated Total New Costs: \$50,000 annually by FYE 2019

Sources of Funding: Increased annual revenue through contributions, sponsorships, and grants and reallocation of existing budget

Required Resources: Current CHM staff, commissioners, volunteers

Measure of Success:

- Average annual growth of 10% in Individual and corporate contributions and sponsorships over the next four years.
- Fundraising events have a minimum annual combined net income of \$30,000 by 2020

Action Steps and Target Completion Dates:

- Identify key stakeholders, donors, & community partners (March 2017).
- Build, re-build, and strengthen relationships with key stakeholders (ongoing).
- Hold additional individual and group meetings with key stakeholders (ongoing).
- Join civic organizations that share an interest with our key stakeholders (ongoing).
- Create at least one new annual fundraising event that has the potential to generate community excitement and reach established fundraising goals (June 2017).
- Expand communication with key stakeholders and host fiscally responsible donor recognition and community awareness events (ongoing beginning in January 2017).
- Add a full-time Volunteer Coordinator position by year three to allow the Development Director to concentrate more fully on fundraising and building donor relationships (July 2018) .
- Track results and feedback (ongoing).

STRATEGY 2: Continue to increase membership and visitation.

Site: All CHM sites

Project Coordinator: Windy Cole

Target Completion Date: Ongoing

Estimated Total New Costs: \$2,000 annually by FYE 2019

Sources of Funding: Growth in existing budget, existing budget

Required Resources: Current CHM staff, volunteers

Measure of Success:

- Maintain an average of 10% Increase in membership income annually through FY 2020.
- Maintain at least 5% growth annually in overall visitation through FY 2019 and at least 10% in FY 2020.

Action Steps and Target Completion Dates:

- Work with Site Managers to develop additional membership incentives (March 2017).
- Increase visibility of on-site membership signage (April 2017).
- Raise awareness of membership opportunities and benefits in the community (ongoing).
- Maintain and ensure quality experience for all members and visitors (ongoing).
- Seek greater documentable input and feedback from members to be used for improving programming (June 2017).
- Use visitor surveys to better understand and document reasons for growth (ongoing).
- Improve overall experience at each site by implementing planned capital and programming strategies (June 2020 and ongoing).
- Track results and feedback (ongoing).

STRATEGY 3: Seek grant opportunities and new public and corporate sponsorships to support existing and planned programming needs.

Site: All CHM sites

Project Coordinator: Windy Cole

Target Completion Date: Ongoing

Estimated Total New Costs: None

Sources of Funding: Existing budget

Required Resources: Current CHM staff

Measure of Success:

- Average increase of 10% in income from grants and sponsorships annually for the next four years.

Action Steps and Target Completion Dates:

- Determine sponsorship levels and corresponding benefits for all special events and exhibits (January 2017).
- Identify potential sponsors and their interests then offer them meaningful opportunities to support the CHM (March 2017 and ongoing).
- Systematically identify and prioritize organizational needs and opportunities to better serve our community that are beyond current funding levels (June 2017).
- Identify and apply for grants that match organizational needs and opportunities (ongoing).
- Collaborate with other community agencies on grant opportunities (ongoing).
- Track results and feedback (ongoing).

STRATEGY 4: Expand retail services at HB and MYCO with value added amenities.

Site: Historic Brattonsville and the Museum of York County

Project Coordinator: Richard Campbell

Target Completion Date: To be determined during Master and Renovation Planning process

Estimated Total New Costs: To be determined during Master and Renovation Planning process

Sources of Funding: Capital budget, fund balance, CHC Capital Projects Fund

Required Resources: Current CHM staff, volunteers, potentially professional and contracted services

Measure of Success:

- Expanded retail services/food service establishments up and running.

Action Steps and Target Completion Dates:

- Determine what is needed based on previously compiled and additional stakeholder input (September 2018).
- Develop scope of work (December 2018).
- Determine if projects can be handled internally or require external expertise (January 2018).
- Determine rough budget and prioritize projects (March 2018).
- Secure funding and appropriate approval (June 2018).
- Implement plans in a fiscally responsible manner (June 2019).
- Track public response. (ongoing)

GOAL II: Develop and implement methods to engage and measure public interest and support.

STRATEGY 1: Increase community advisory opportunities through committees, project teams and program planning.

Site: All CHM sites

Project Coordinator: Carey Tilley, Sarah Lewis

Target Completion Date: Ongoing

Estimated Total New Costs: \$1,000 annually by FYE 2019

Sources of Funding: Reallocation of existing budget

Required Resources: Current CHM staff, commissioners, partners, volunteers

Measure of Success:

- Representatives of diverse segments of the community serve on committees and planning teams for the CHC.

Action Steps and Target Completion Dates:

- Continue to utilize existing community committees and project teams (ongoing).
- Identify areas and initiatives within the organization that could benefit the most from greater community input (April 2017).
- Establish standing and/or *ad hoc* committees to address the identified areas (June 2017).
- Appoint representatives to committees that are in a position to offer meaningful input and reflect a cross-section of the community (August 2017 & ongoing).
- Create schedule and hold committee/planning meetings on regular basis (ongoing).

STRATEGY 2: Increase audience input through various evaluation methods.

Site: All CHM sites

Project Coordinator: Carey Tilley, Sarah Lewis

Target Completion Date: Ongoing

Estimated Total New Costs: None

Sources of Funding: Reallocation of existing budget

Required Resources: Current CHM staff

Measure of Success:

- Useful data of sufficient sample size and from target groups are gathered for each site.
- Information is documented and available for planning.

Action Steps and Target Completion Dates:

- Revise survey forms for each site to ensure that they are compatible with each other (February 2017).
- Create and implement a plan to more effectively encourage response to surveys (April 2017).
- Provide meeting opportunities for support groups and volunteers to give direct input to management and program planners (ongoing).
- Utilize our over 1,500 members as a source for feedback on specific questions through online communication and surveys (ongoing).

STRATEGY 3: Review and apply audience input to inform planning for capital projects, programs, exhibitions, marketing and visitor services.

Site: All CHM sites

Project Coordinator: Carey Tilley, Sarah Lewis

Target Completion Date: Ongoing

Estimated Total New Costs: None

Sources of Funding: Existing budget

Required Resources: Current CHM staff

Measure of Success:

- Audience input is gathered, documented, synthesized, and analyzed for all major programming and capital projects.

Action Steps and Target Completion Dates:

- Collect audience feedback through surveys, group meetings, individual conversations, and online comments (ongoing).
- Consider factors such as attendance and sample size when evaluating whether or not feedback is representative of the experience (ongoing).
- Analyze data to determine areas that need to be improved or strengthened (annually and as needed for specific programs and projects).
- Improve program or project as appropriate in response to feedback (annually and as needed for specific programs and projects).
- Evaluate ongoing programs annually (each August).

GOAL III: Continue to improve visitor services, amenities and accessibility.

STRATEGY 1: Develop staffing plan to accommodate increasing attendance and institutional growth.

Site: All CHM sites

Project Coordinator: Carey Tilley, Sarah Lewis

Target Completion Date: March 2017

Estimated Total New Costs: None

Sources of Funding: Existing Budget

Required Resources: Current CHM staff

Measure of Success:

- Creation of a five-year plan to address staffing needs.

Action Steps and Target Completion Dates:

- Assess growth trends and projected impact of proposed programmatic and capital changes on visitation (January 2017).
- Identify positions throughout the organizations that will be needed to keep up with anticipated growth (February 2017).
- Identify costs for new positions (February 2017).
- Prioritize and create a timeline for new staffing needs (March 2017).
- Identify sources of funding to cover new costs (March 2017).
- Draft a five-year staffing plan (March of 2017).
- Review plan at least once each year as an integral part of the annual budgeting process (Each March).

STRATEGY 2: Improve operational capacity of facilities to ensure audience accessibility and safety as well as security for our resources.

Site: All CHM sites

Project Coordinator: Richard Campbell

Target Completion Date: Ongoing

Estimated Total New Costs: TBD

Sources of Funding: Capital budget, potentially fund balance and the CHC Capital Projects Fund

Required Resources: Current CHM staff, potentially professional and contracted services

Measure of Success:

- All facilities serve as effective venues to achieve stated programmatic and operational goals.

Action Steps and Target Completion Dates:

- Evaluate preservation needs (December 2017).
- Develop a prioritized list of projects (January 2018).
- Develop a scope of work for each project (February 2018).
- Determine if projects can be handled internally or require external expertise (February 2018).
- Determine rough budget and phasing for projects (March 2018).
- Secure funding and appropriate approval (December 2018).
- Implement plans in a fiscally responsible manner (June 2020).

STRATEGY 3: Explore ways to better reach underserved audiences.

Site: All CHM Sites

Project Coordinator: Carey Tilley, (Sarah Lewis)

Target Completion Date: December 2017 (with annual review)

Estimated Total New Costs: None

Sources of Funding: Existing budget

Required Resources: Current CHM staff, community partners

Measure of Success:

- Creation of an achievable plan that includes new programming that will be attractive and accessible to underserved audiences. The plan will also include costs and identification of funding sources to implement the new programming.

Action Steps and Target Completion Dates:

- Identify current and potential community partners that would be beneficial in planning services to underserved audiences (February 2017).
- Assess needs of underserved audiences within our community that we could positively impact (May 2017).
- Assess our current efforts to address the identified needs through internal and external evaluation (May 2017).
- Identify ways to make current programming more accessible to underserved audiences (July 2017).
- Identify new accessible programming opportunities that could attract underserved audiences and meet identified needs in the community (August 2017).
- Assess costs and logistical issues of current and potential new programming (September 2017).
- Test “pilot” programming and response of specific target audiences (November 2017).
- Identify funding sources for new costs and seek funding to implement new plans (December 2017).
- Incorporate new programs into annual budget, programming, and marketing plans (March 2018).
- Continue to review and refine efforts to reach underserved audiences annually (ongoing).