

DRAFT – Updated 8/18/2017

# SAMPLE-McDOUGALD HOUSE

1916 HISTORIC MUSEUM AT CENTENNIAL PARK



SOUTH FLORIDA'S HOME FOR HERITAGE

## **SMH 2020 PLAN**

A Strategic Plan completed by the Sample-McDougal House

Board of Directors and Staff

## **Organizational History & Strategic Position Statement**

The Sample-McDougald House, listed on the National and Local Register of Historic Places, is a distinctive historic house museum known for its unique architecture, history and cultural background. It was built in 1916 by Pompano Beach pioneer and farmer, Albert Neal Sample, who served as a community leader until his death in 1941. The Colonial Georgian-revival home was sold to William and Sarah McDougald in 1943. Generations of McDougald's were raised in the home until the 1990s. The McDougald Family preserved the architectural and structural integrity of the home, making only slight changes to the property over time. When increased urbanization changed the historical character of the original home site, the McDougald family sought to donate and preserve the home. The Sample-McDougald House Preservation Society, Inc. was formed and received the donation of the building in 1999. The 4,500 sq. ft. structure was then moved to its current location in Centennial Park in May of 2001. Hundreds of local residents and businesses contributed to the restoration and site development through financial and in-kind contributions. After more than a decade-long restoration funded by individuals, businesses and local governments, the home opened to the public in November of 2012. The city was with us every step of the way and has continued to support our efforts for the past 18 years.

Today, this historic house museum hosts approximately 7,500 visitors per year, offering opportunities to learn about the heritage of two of Pompano Beach's prominent families through daily guided tours. Visitors learn about the unique south Florida architecture, early 20th century lifestyles and discover the regional connections to agricultural and coastal history. Guests may also visit, picnic and enjoy the 5-acre Centennial Park, in which the home sits and our edible heritage garden.

Largescale community events hosted in the last 12 months include: 100 Years: A Centennial Celebration, A Haunted House, Holidays at the House, the Antique Car Show, Farm Heritage Days, Plants & People Day, the Florida Highwaymen Exhibition and the Pineapple Jamboree. We regularly collaborate with other local businesses and nonprofits to carry out these events and to deliver a variety of community engagement.

Staff members customize field trips for K-12th grade school groups. More than 500 children from greater Broward County participated in history activities and events over the past five years.

The City of Pompano Beach Preserve America designation solidifies the importance of our community's heritage, and the Sample-McDougald House is proud to be part of the fabric that makes up that heritage.

As a fledgling cultural organization in the community, the Sample-McDougald House has just five operating years under its belt. In our first years of operations, our focus was on community events, venue rentals and daily historic tours. Today, we aim to increase our impact in the community and broaden our audience reach by offering a fully comprehensive, educational and diverse range of cultural, arts and heritage programs and events.

The strategic planning process underway will be the new roadmap to the future sustainability of the Sample-McDougald House. To build a solid financial framework, public program, brand value and internal infrastructure this new strategic plan will re-calibrate the mission, vision, core value, goals, objectives and actions strategies of the SMH. The 2017-2020 strategic plan will address and prioritize the objectives and strategies for the organization to achieve enduring financial sustainability and quality, focused public programs.



### **Methodology**

Following the Museum Assessment (MAP) Report of 2016, key recommendations were identified and it was clear a new business plan was greatly need to sustain the operations of the Sample-McDougald House. In the spring of 2017, the President of the board, executive director and board members at-large gathered resources to begin a strategic planning process. The group secured the use of Tina Murto, Senior Program/Project Coordinator with Broward County Parks and Recreation as the facilitator for a planning workshop. The workshop meeting space and lunch was donated by John Knox Village. The workshop was held on Saturday, June 3, 2017. Following the workshop, Ms. Murto collected the information from the day-long workshop and presented an organized draft document to the executive director. A public survey was created and sent out to gather information from an external perspective. A collections assessment was conducted by Annette Fromm, a conservator, in April 2017 to detail object preservation needs. Using the 2016 MAP report, Fromm report, the public survey and the Murto document a compiled draft strategic plan was then reviewed by a second task force of board members. The final draft document was presented for the full board of directors review in August of 2017.

### **Structure**

The strategic plan will span three years from 2018-2020.

### **Evaluation**

The strategic plan will reviewed annually to measure the progress of goals and objectives. Additionally, an ongoing dashboard of impact, progress, improvements and success stories will be kept in a database with our goals and objectives.

## **State of the Organization - SWOT**

### **Strengths**

- Dedication
- Passion
- Sweat equity
- Tenacity
- Resilience
- Leadership
- Strong and committed Board of Directors
- Partnerships
- Focus
- Community Minded
- Thoughtful
- Respect
- Outside the box thinking

### **Weaknesses**

- Financial
- Fund raising
- Publicity/Promotion
- Not enough workers (volunteers?)
- Limited visitor experience
- Bridge with African-American community
- Regular Sample-McDougald family interaction
- Historical Society relationship
- Physical site/accessibility

### **Opportunities**

- Financial: grants, donors, endowments
- Partnerships: other museums
- Volunteers
- Programming: educational, workshops, events
- Products: bricks, etc.
- Technology
- Memberships
- Board development
- Additional Facilities: pavilion, offices, parking, multipurpose space
- Develop operational policy and procedures.

### **Threats**

- Economy/Changing Market
- Loss of Partnerships
- Loss of funding
- Facility disasters (fire, hurricane, termites, vandalism)
- Competition for volunteers

## **State of the Organization – Additional Reports**

### **Collections Assessment Report Recommendations**

- Update and write a collections management policy
- Review CMPs from other museums
- Write a collections manual
- Assign storage for collections only
- Inventory and catalog collections

### **Strategic Planning Survey Results**

- Most people find us by word of mouth. Our online presence is low and needs improvement.
- Most people believe we have done an excellent job with preserving the house.
- Comments from survey results indicated we should invest in youth educational programs, community events and multipurpose/banquet/large use space.
- Overall, people think our organization is very good and want to continue to see us thrive/grow.

### **Operational Data**

- We hosted about 10 weddings and rentals in the last 12 months.
- We have about 50-membership household. This is very low, however; the majority of our members are very loyal, love history and are community residents.
- Our annual attendance from August 2016 – July 2017 was 5,960. This includes all daily admission tours, groups, field trips, rentals, weddings and events.
- We host about 4-5 community events for other organizations annually.
- We have hosted about 2-3 fundraisers annually.
- We have run a large deficit since opening in fall of 2012, possibly before. This deficit has ranged from \$34,000 - \$95,000). Our annual operating costs have averaged around \$140,000 and our income around \$82,000.
- There is no central database of constituents – donors, members, volunteers, vendors, staff, etc.
- There is no policies, manuals or organizational documents for staff, emergencies, operations
- We have an ongoing facilities report with a number of deferred maintenance and repair projects, but overall the house is in very good working condition.

**Mission**

The mission of the Sample-McDougald House is to preserve, interpret and share its history and culture.

**Vision**

South Florida's home for heritage

**Core Values**

Honor & Preserve Authentic Heritage

Teamwork & Collaboration

Excellence in Presentation

Integrity & Transparency

Inclusion & Diversity

Stay Relevant with Change

**Key Strategic Issues**

Financial Sustainability (Funding)

Public Engagement & Education (Engagement)

Visibility & Community Partnerships (Marketing)

Lifelong Preservation (Preservation)

**Goals**

Grow Capacity and Build Financial Sustainability (Funding)

Enhance the Visitor Experience (Engagement)

Generate Greater Public Awareness (Marketing)

Enhance & Maintain Our Historic Presence (Preservation)

## **Goal #1: Grow Capacity and Build Financial Sustainability**

### **Objective A: Increase contributed revenue by 25%**

- Research, identify and cultivate new and ongoing donors
- Develop new corporate and individual giving opportunities and benefits
- Build constituent database (donors, members, volunteers, vendors, etc.)
- Determine board of directors responsibilities for developing relationships
- Redevelop membership program
- Sell reminder of all blank memorial bricks
- Implement an annual appeal program

### **Objective B: Increase foundational, grant and corporate funding by 25%**

- Identify funding sources and areas of need
- Build a timeline and submit on-time grant applications

### **Objective C: Develop & implement signature fundraising events and activities**

- Research current, successful fundraising events and activity types
- Develop an event plan

### **Objective D: Develop & implement long-term funding sources**

- Compile long-term, capital and operational budget and needs
- Research feasibility of endowment campaign
- Create and write a planned giving program

### **Objective E: Increase earned revenue by 25%**

- Develop new sales strategies and collateral package materials for venue rentals
- Solidify vendor and catering partnerships; Develop birthday party offering
- Market general admission, field trips, groups sales and small retail items
- Develop new revenue generating calendar of events and programs for all ages

### **Objective F: Build internal institutional capacity and infrastructure**

- Implement museum best practices as established by the AAM National Best Practices & Standards document
- Write board, employee, volunteer and organizational manuals
- Establish all organizational policies, requirements and content for business standards
- Set expectations and train all honorary members, directors and committees
- Streamline staffing structure to support strategic goals
- Attract, develop and retain experienced and qualified employees and volunteers
- Ensure SMH is in compliance with state and federal labor laws
- Analyze future staffing needs, identify gaps, required skill sets, timeframe for hiring, etc.
- Integrate all work plans with the goals and objectives of Strategic Plan
- Evaluate operational successes and make adjustments when necessary
- Utilize and employ technology

### **Objective G: Increase long-term financial planning and analysis**

- Utilize Quickbooks for all accounting, budgeting and reports
- Develop and write an annual budget
- Establish streamline, ethical and proper accounting, payroll and billing controls
- Create monthly actual accounting reports vs. budget to control spending
- Track, properly record and code all cash and in-kind revenue and expenses

## **Goal #2: Enhance the Visitor Experience**

Objective A: Interpret our agricultural, coastal and families' stories, themes and activities

- Write and implement an Interpretive Plan
- Research and establish an historically accurate and compelling streamline house tour
- Research connections with multi-cultural groups and the House
- Produce multi-language tours
- Install a new permanent historical exhibit for the house
- Recruit and train docents to implement new tour
- Enforce proper customer service training and procedures

Objective B: Implement a life-long learning plan for all ages

- Establish a K-12<sup>th</sup> grade plan for educational programs, field trips and, teach resources
- Establish an series of ongoing adult programs for the public and John Knox Village
- Establish a school/intern/university program to conduct research, volunteer and assist in collections management

Objective C: Present changing exhibits

- Research traveling exhibits
- Build an ongoing calendar of changing exhibits
- Build relationships with other museums and colleagues
- Partner on collaborative exhibits with other organizations

Objective D: Present a new and ongoing calendar of events

- Establish event working within key areas of Heritage & Preservation, Performing & Visual Arts, and Food & Agriculture
- Publish an annual calendar of events
- Produce and participate in and partner with multi-cultural events and programs

Objective E: Present programs for a diverse audience

- Write a diversity & inclusion statement
- Develop relationships with ethnic, religion and persons with disabilities affinity groups
- Audit ADA compliance and accessibility
- Develop multi-language visitor media and signage



### **Goal #3: Generate Greater Public Awareness**

#### Objective A: Develop & implement a marketing plan

- Identify key audiences
- Identify effective, efficient and affordable marketing opportunities
- Cultivate relationships with media and promotions organizations
- Create collateral materials to support fundraising and operational activities

#### Objective B: Create an online presence

- Update and evaluate our website regularly
- Utilize social media to build event notifications
- Invest in outside services to support online marketing & SEO
- Publish monthly e-newsletters
- Establish an Interpretive Plan
- Research and establish an historically accurate and compelling streamline house tour
- Write and install a new permanent historical exhibit for the house
- Recruit and train docents to implement new tour
- Enforce proper customer service training and procedures

#### Objective C: Build relationships with tourist and regional marketing outlets

- Develop & implement a regional heritage alliance
- Formulate an outreach schedule of talks and presentations at area events
- Cultivate and build partnerships with destination marketing organizations (DMOs)
- Send out regularly scheduled press releases and cultivate bloggers, travel writers, tourism bureau

#### Objective D: Establish the leadership of SMH in the museum and regional community

- Host cultivation events for city, chamber and county leadership
- Regularly communicate news and events with city, county and state legislators
- Participate in professional development

#### Objective E: Develop a business plan for venue rentals

- Create a print and online new wedding, social event and corporate rental sales packet
- Invest in niche marketing for group sales and weddings

## **Goal #4: Enhance & Maintain Our Presence**

Objective A: Maintain ongoing preservation standards to the House

- Write a long-term preservation and maintenance plan for the House
- Identify short- and long-term physical needs, repairs and projects

Objective B: Develop a master plan for Centennial Park

- Identify key physical components, spaces and long-term needs
- Communicate with city officials about future plans, pavilion concept and the Elks Club property development
- Write and implement a wayfinding and directional sign plan
- Evaluate all spaces usage
- Expand museum facilities

Objective C: Establish an excellent collection

- Develop a Collections Management Policy
- Participate in the Florida Association of Museums Connecting 2 Collections workshop series
- Install and implement the use of PastPerfect Software
- Inventory, accession properly, label and digitize collections into PastPerfect Software
- Collect and preserve significant examples of early 20<sup>th</sup> century objects, furnishings, documents, photographs and books
- Maintain SMH archive of institutional history

Objective D: Utilize media & technology

- Research feasibility and cost of tour audio guide
- Produce an introductory film
- Produce videos for online marketing
- Produce and sell an historic music CD of Mrs. McDougald's compositions
- Develop a partnership with Pompano Beach Middle School multi-media department