

CHEROKEE HISTORICAL & PRESERVATION SOCIETY, INC.

THREE-YEAR STRATEGIC PLAN FINAL REPORT



October 2016

October 14, 2016

Board and Members,

It is my pleasure to present to you the Final Report of the Cherokee Historical & Preservation Society's three-year strategic plan covering 2013 to 2016. This process has been the first of its kind for our organization and has allowed us to focus on the most critical issues faced by CHAPS. In addition, it is a stepping stone into a new phase of development for the organization. Thank you for your support on the various committees upon which you have served. Please review the comments for each goal and strategy. While not all goals have been fully met, we should be proud of the successes that we have seen in this plan's implementation and use it as a template to renew our strategy for the future.

Billy Pennington, Chair

Strategic Plan Committee

Committee Members:

Dinah Hamrick, Dollie Blanton, Jane Waters, Barbara Shackelford, Lisa Higgins

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MISSION STATEMENT

The mission of the Cherokee Historical and Preservation Society, Inc. is to preserve regional history and cultural heritage.

Note that this mission statement was adopted following the American Association of Museum's "Museum Assessment Program" assessment completion in 2012. The MAP assessment also recommended that board create and implement a strategic plan.

HISTORY AND FUTURE PLANS

As originally stated in the 2013-2016 Strategic Plan:

The Cherokee Historical & Preservation Society, Inc., a private 501 c 3 non-profit, was formed in 1969 to protect the county's rich history and cultural heritage. Over the decades CHAPS acquired Possum Trot School and Vinson-Blanton Burying Ground. A primary goal of the group was to establish a local history museum. Nearly forty years later, that goal was achieved with the opening of the Cherokee County History and Arts Museum on May 17, 2008. The museum has and continues to be recognized as one of the best in the region and serves to educate locals and visitors, while being a location for preservation of our cultural heritage.

The facility, formerly Central Elementary School as well as mustering grounds for the South Carolina militia, was purchased from the Cherokee County School District. The original plan was to form the Cherokee County History Museum and Fine Arts Center. As funding for the entire project was difficult, CHAPS adjusted the long-range plan, renovating only one-third of the space as the Cherokee County History and Arts Museum, dividing the remaining capital improvements into Phases Two, Three, and Four. Since the museum opened interior renovations to Phase Two have allowed the rental of the Museum Event Hall, kitchen, foyer, and conference room.

As CHAPS moves into its forty-fourth year of existence, the sustainability and development of the museum facility dominates as its primary task. Fundraising projects are underway for roof repairs on Phases Two and Three of the building and this proposal calls for updating the development plan for the interior of Phase Three. One part of that plan will be the establishment of a local sports hall of fame exhibit, which is already gaining much support in the community.

In 2012, CHAPS completed the American Alliance of Museum's Museum Assessment Program. This assessment brought to light many issues that the organization faces currently and in the coming years. One of those recommendations was the formation of a strategic planning committee to look at critical issues and develop this strategic plan to guide CHAPS over the coming months and years, with the goal of long-term viability for the Museum and CHAPS as an organization and to better meet the needs of our community.

Update

Since the implementation of this strategic plan, CHAPS has acquired the Revolutionary War significant Fort Thicketty and five surrounding acres. This adds a fourth property to the Society's assets but has also added a fourth liability for the organization to develop and maintain.

STRATEGIC GOALS OVERVIEW

As originally stated in the 2013-2016 Strategic Plan:

The issues faced by the Cherokee Historical & Preservation Society, Inc. fall into three broad categories: Money, Management, and Marketing. As a result, our goals address these issues. The strategic planning format consists of goals, strategies to reach those goals, action steps for each strategy, and indicators of success as each goal is met. A steering committee of stakeholders, appointed by the Board of Directors, will be responsible for the implementation of the plan and regular reporting on its progress.

STRATEGIC GOALS:

1. Strengthen present and future financial security.
2. Establish professional and effective business practices.
3. Improve public image and awareness.

GOALS, STRATEGIES, FOLLOW-UP, AND RECOMMENDATIONS

GOAL 1: STRENGTHEN PRESENT AND FUTURE FINANCIAL SECURITY

- 1) Provide sound fiscal management, oversight, and transparency.

The Finance Committee has worked to create an itemized income and expense report for monthly review by the Board of Directors. These reports are then used to create a yearly budget with a monthly report provided to the Board for monthly oversight. The annual budget must be approved by the Board of Directors. In addition, an annual financial report is provided to the Board of Directors. Our annual financials and required tax data are sent to an accountant outside of the office for oversight and to prepare tax filings.

It is recommended that these practices continue in order to provide sound fiscal management, oversight, and transparency, as well as ensure the organization is financially sustainable into the future. It is recommended that CHAPS complete a yearly internal audit of finances. This was one of the Action Steps in the plan that has not been completed.

- 2) Establish modern and transparent accounting principles.

In order to be more modern and transparent in our accounting practices, all financial records are entered into Quickbooks for Non-profits accounting software. This provides easy access to reports and provides great oversight and transparency.

It is recommended that Quickbooks software be updated regularly in order to protect the data that is being stored. The current version is 2013 and Quickbooks has sense updated to newer and more secure versions. It is also recommended that training be provided for this system for more than one person associated with the organization.

- 3) Develop a stable base of financial support.

Through the budget process, current financial support has been identified and operational vs. project-based funding is clearly delineated. An endowment fund has been created as recommended in the strategic plan. Limited success has been seen with grant funding.

Efforts to seek out long-term funding sources have not been successful. It is recommended that this be a focus of the organization going forward in order secure sustainability. It is also recommended that efforts continue to be made to diversify contribution sources and seek funding outside of the local area.

- 4) Reach three hundred or more in membership.

The Membership Committee and Board of Directors has made great effort in growing membership levels through the 1,000 Member Challenge annual membership drive. Unfortunately, this goal has not been reached and membership levels have only slightly increased over the past three years. In addition, the Museum Patriots program was established in order to target business memberships and contributors. As planned, the Membership Committee has been mostly successfully in meeting regularly and reporting monthly to the Board. The Committee has also planned to send New Member packets to those who have joined CHAPS for the first time and have discussed ideas to enhance the value of a membership.

It is recommended that the proposed Action Steps to target local professionals and businesses be continued. The New Member packets also should be sent before these members are asked to renew for the coming year. The "added value" of memberships is also a positive step in the effort to retain members which seems to be the biggest issue facing this goal. A major component of this is to maintain one-on-one contact with members through the newsletter, email, mailings, social media, etc. This part of the strategy has fallen short over the past three years and should be addressed.

- 5) Use funds for most profitable activities.

In order to address this strategy, the Finance Committee and Board have successfully streamlined the fundraisers conducted by CHAPS. Steps taken include closing reviewing the profitability of each fundraiser, ensuring each fundraiser has a budget and sponsorships for expenses, providing a line-item recap for each fundraiser, and recommending changes to make fundraisers more profitable.

It is recommended that the Board continue to address the profitability of each fundraiser using the Event Financial Form developed by the Finance Committee. In addition, it is recommended that time and energy be focused on the most profitable fundraisers rather than those that take away from productivity. It is also important to clarify that educational programs are not necessarily fundraisers, although they may sometimes provide income.

- 6) Maximize profitability from facility rentals.

Facility rentals continue to be one of the highest generators of income for the organization by percentage. The budget process has allowed for the estimation of facility use vs. income and a rental-specific marketing plan has been initiated. The action step to create and distribute a post rental survey was controversial and was not developed.

It is recommended that the rental-specific marketing plan continue to be developed and focused. As new venues become available in the community, it will be harder to compete for these valuable customers. The condition of the facility will have to be maintained in order to appeal to new renters and procedures and policies must be followed in order to ensure the quality of experience the Museum has come to be known for is sustained.

GOAL 2: ESTABLISH PROFESSIONAL AND EFFECTIVE BUSINESS PRACTICES

1) Develop technology.

Upon initiating the strategic plan, staff identified the technology needs of the facility. The Board then approved the funding for the purchase and installation of new computers and software. Efforts to backup data to cloud storage have been initiated but are not complete. Data backups are, however, completed regularly to external storage devices.

As technology is always developing, it is recommended that this important component of the strategic plan always be in review. The Quickbooks software for bookkeeping is out of date and has shown signs of technical issues, as well as the PastPerfect software used for much of the organization's data. Both programs are on much newer versions and should be updated. The use of cloud-based data backups should also continue to be discussed but implemented only with the proper security mechanisms in place.

2) Provide professional development for staff, board, and volunteers.

This strategy has been addressed by gathering all relevant materials, such as policies & procedures, operation manuals, etc. into one area for easy reference. In addition, complimentary advice has been sought and sometimes provided from other professionals in regards to funding opportunities.

It is recommended that the action steps of the strategic plan be taken as listed in the plan: enhance and ensure board member orientation, compile a list of resource materials for roundtable discussions, and encourage appropriate webinar sessions. In addition, opportunities for interaction with other non-profit professionals should be utilized through associations such as the South Carolina Association of Non-Profits and the American Alliance of Museums.

3) Recruit adequate and competent staffing for job-specific tasks.

CHAPS has undergone several personnel changes since the start of this strategic plan. A new Executive Director has been hired, as well as a new bookkeeper and Museum Assistant. Roles and job descriptions, while established have changed. As suggested, the Board allocated funds from a generous donor to support staffing needs.

It is recommended that personnel needs always be reviewed based on the job-specific tasks needed. The current bookkeeper has already indicated a desire to retire, so the process of looking for a competent individual should begin right away and let training occur before the position is empty. Job descriptions may need to be reviewed, but with the understanding that with such a limited budget it is often necessary for all staff members to be able and willing to work in various capacities.

- 4) Commit to a policy of record-keeping that is accurate, current, and transparent.

This strategy has been addressed through the use of Quickbooks, PastPerfect, and monthly reports being required of each committee.

It is recommended that every committee, either standing or ad-hoc, provide a monthly report to the Board. If that committee did not meet then this too should be reported.

- 5) Update policies and procedures.

As proposed in the plan, policies and procedures have been developed in most critical areas of the organization.

It is recommended that policies and procedures be reviewed regularly for necessary revisions, but that these policies and procedures always be followed in order to protect the integrity of the organization and staff.

- 6) Develop a volunteer program.

While there exists a volunteer application, very little has been done in regards to the development of this program. There has been one volunteer appreciation dinner provided and the staff and Board seeks to secure volunteers based on the schedule and activities.

It is recommended that other volunteer programs be reviewed in order to better recruit and retain volunteers for the organization.

GOAL 3: IMPROVE PUBLIC IMAGE AND AWARENESS

- 1) Establish a dynamic marketing plan.

While marketing takes place, a marketing plan has not been developed. Currently, the primary means of marketing CHAPS and the Museum is through the Museum rack card, website, social media, and email blasts. Identifying location, directions, and mission has been better addressed since the implementation of the plan.

It is recommended that the action steps listed in the strategic plan be further developed. These steps were to analyze the effectiveness of current marketing tools, develop an overall marketing strategy, and ensure marketing reaches a wider audience.

- 2) Create a plan for outreach and partnerships in the community.

Meetings with other organizations through groups such as Collaborative Council have provided opportunities for greater awareness and marketing for CHAPS. CHAPS has invited and provided meeting space for partners in the community for governmental, educational, and organizational meetings, as well as provided a location for training sessions, as recommended in the strategic plan.

It is recommended that CHAPS continue to partner with other organizations in as many efforts as possible, as long as they are in keeping with the mission statement. It may not be prudent to spend valuable time and resources on the creation of a partnership plan as long as CHAPS is represented in groups that exist to promote partnerships, such as Collaborative Council.

- 3) Maintain adequate and consistent museum hours of operation.

Based on this strategy, the Museum hours have been established as Monday through Friday from 10:00am to 4:00pm. In reviewing attendance data for other times, it was determined that the community did not take advantage of other hours and days of operation. The staff continuously seeks to utilize volunteers in the operations of the Museum.

It may be that better marketing would result in better attendance for the hours and days that the Museum is not currently opened. This should continue to be discussed as the organization's opportunities in programing develops.

- 4) Provide adequate and competent staffing for public relations.

This strategy has not been addressed.

It is recommended that the Board consider if this requires a separate position or if it should be handled by a current staff member. If so, guidelines for what this entails should be developed.

- 5) Update development plans for Phases Three and Four of the Museum.

In the time that has passed since the original concept for the Cherokee County History Museum and Fine Arts Center was adopted, there have been many changes in the needs of the community, as well as the economy nationwide. The action steps in the strategic plan were to review existing plans, make recommendations for changes, and adopt the updated plans. The proposed plan is presented in greater detail in the Appendix.

It is recommended that Board approve the proposed updates to the plans for Phases Two and Three of the Museum facility. Having a plan in place will allow progress to be made in seeking funds for the project. Without a clear vision, it is impossible to move forward with plans for the future of the Museum.

- 6) Promote the image and uniqueness of CHAPS vs. the Museum.

The steps recommended to address this strategy were the creation of a Museum-specific mission statement and to make clear the relationship between CHAPS and the Museum in all marketing materials. These steps were recommended by the MAP Assessment reviewer in 2013. Recommendations for a Museum-specific logo in order to separate the Museum as the destination and CHAPS as the organization were not approved by the Board and as no marketing plan has been developed, this strategy has not been a priority.

It is recommended that marketing materials continue to focus on the Museum as the destination and CHAPS as the organization. It would benefit the organization to look at similar relationships between historical societies who also operate museums and own other properties to see what this relationship should look like going forward.

Phases Three and Four Development Plan for the Cherokee County History & Arts Museum

Background:

In 2000, upon acquiring the former Central Elementary School, CHAPS secured the services of Campbell, Meek, & Associates to develop a concept plan for converting the historic site into the Cherokee County History Museum & Fine Arts Center. The same year, Robert Bainbridge of Clemson University presented gardens and site improvements plan for the grounds.

With a decision in 2006 by the Board to break the development of the project into phases as the Cherokee County History & Arts Museum, CHAPS was able to successfully establish Cherokee County's first museum in about 3,500 sq. ft. of the building highlighting the area's rich cultural heritage. Phase Two of the project was completed in 2012, allowing for the conversion of the former cafeteria into the Museum Event Hall. This space has been used for special exhibits, theatre productions, educational programs, conferences, and is rented to the public as one of the area's most sought after rental facilities.

Since the original concept, it has become necessary for CHAPS to change directions as to the use of the building as a fine arts center as the needs of both the Society and the community have changed. The City of Gaffney undertook the preservation of the historic Post Office building, converting it into the Gaffney Visitor's Center and Art Gallery. This facility now houses both gallery space and areas for teaching and creating visual art. The Gaffney Little Theatre and Limestone College provide ample space for the performing arts and the Cherokee County History & Arts Museum Event Hall has also been used for theatre productions. In addition, the City of Gaffney has undertaken the development of a performing arts center in downtown Gaffney.

As a result of these developments in the community, the space planned for fine arts in the original concept would be overlapping other efforts in the community. Phase Four of the Museum project are the grounds. While the Bainbridge design is a beautiful use of the space, it has become clear that the open greenspace of the historic mustering grounds is of greater need by the community and is more sustainable for the Society to maintain. It is for this reason that this proposal reduces the amount of space designated for fine arts and gardens, and changes the focus for Phases Three and Four of the History and Arts Museum. This proposal takes into account the needs of the community and the Society, remaining focused on the organization's mission.

Since the opening of the Museum in 2008 many ideas and recommendations have been discussed concerning the development of Phases Three and Four. Phase Three, in its current condition, has no climate control and a failing roof. The space can be used only for storage of objects that are not subject to moisture and temperature damage. Phase Four has been enhanced by the construction of a Pavilion using the roof of the historic Irene Pool Pavilion. In addition, the area was recently marked with a historical marker describing the significance of the site as the location of Central School and part of the original property belonging to Michael Gaffney known as Gaffney's Old Field.

Phase Three:

- Roof the portions of the building that were not covered in the Museum Phase One project.
- Replace the Phase One shingles, as they have reached their lifespan, with a matching roof.
- Add additional restrooms that add accessibility for rentals and events.
- Convert the former school library room into an archives, research, exhibit, and meeting space. This space would house the Museum's historic spinning wheel collection which is currently unable to be displayed due to space restraints. This room also has a restroom and two rooms that can be used for research, similar to the space currently being used by the DAR/UDC in the Museum. This room also has extensive storage and display areas, as well as space for small meetings and archives of historical documents, maps, photographs, etc.
- Convert one of the former classrooms into collections storage and exhibit development space.
- Convert one of the former classrooms into component storage.
- Convert two of the former classrooms into the Cherokee County Sports Hall of Fame.
 - Room A: The exhibition of local memorabilia related to sports.
 - Room B: An interactive "Training Center" for kids and kids at heart. The "Training Center" will be the part of the Sports Hall of Fame that is hands-on, with sports-related activities, such as tossing a football, shooting hoops, testing the speed of your fastball, and even space for birthday parties.
- Convert two of the former classrooms in the Kid's Discovery Zone.
 - Room A: This space would present the history of arts, music, and science but also allow kids the freedom create their own artwork, try out different musical instruments, and experiment with science.
 - Room B: This interactive space will present history through the eyes of children. Kids can dress up like historical figures, use tools from life on a farm, play games from colonial times, read and write children's books, and be inspired by influential youth from around the area and world.
- Relocate the main entrance of the building to the current Foyer.

Phase Four:

- Replace the existing chain-link fence with a more aesthetically pleasing fence, such as wrought-iron. Ideally, this wrought iron could be created in segments by local artisans.
- Install indigenous plants and small-scale gardens with interpretive text for educational opportunities about the area's ecosystem.
- Provide creative outlets for local artists through the display of sculpture and art gardens on the grounds.
- Incorporate items from our collection, such as the 14ft arch from Gaffney Manufacturing and the original school bell into grounds features to highlight our local history.
- Construct an outdoor Nature Explore® classroom to enhance opportunities for visual-spatial learning in a natural environment.
- Tie the grounds into existing trails, such as the Carolina Thread Trail and Cherokee County Revolutionary War Trail, to provide improved health benefits on standard of living for the community.
- Create ample parking for the facility and rentals, without losing the benefit of the open greenspace.
- Install adequate and aesthetically enhancing lighting to the grounds to improve the security and value of the property.