

# Preservation Maryland

## Strategic Plan | Extending Our Reach - Increasing Our Value | FY 2014-2018

Adopted: September 25, 2013

Updated: July 13, 2015

### Mission Statement

Preservation Maryland is the statewide non-profit organization dedicated to preserving Maryland's rich and diverse heritage of historic buildings, landscape and archeological sites through outreach, funding, and advocacy.

### Introduction

Founded in 1931 as the Association for the Preservation of Maryland Antiquities, Preservation Maryland (PM) is America's second oldest statewide historic preservation organization. For more than eighty years it has been dedicated to preserving historic buildings, neighborhoods, landscapes, and archaeological sites through advocacy, increasing public awareness, and funding. It has a long and proud record of service to the citizens of Maryland.

The last five years, however, have been challenging for PM, as they have for the majority of the 2.5 million nonprofit institutions in the country. Named the Great Recession, from 2008 until recently, it caused the American economy to suffer through its worst economic downturn in nearly seventy-years. The nonprofit sector was especially hard hit. During that period, a steady stream of grim reports came from institutions large and small, publicly and privately funded, throughout the nation. These hard times led to deep budget cuts, staff reductions, salary freezes, and the elimination of programs and services. Few nonprofit institutions were immune from this economic malaise. Many were forced to close down altogether, and large numbers are mere shadows of what they were prior to the Great Recession.

During this challenging period, however, PM went into a defensive mode, maintaining budget discipline, and refusing to add new programs and services without funding. It worked to preserve existing assets, maintain strict budget controls, and enhance revenue when possible. As a result, PM was perceived as "hunkering down," keeping a low public profile and offering limited programs and services. This, no doubt, helped PM survive the Great Recession much better than many of its peers.

At the same time, this hunkering down eventually led to a degree of frustration from a number of PM's stakeholders. In a recent survey conducted by Bryan & Jordan Consulting, more than thirty trustees, stakeholders, and staff members argued that the organization has become complacent, lacks both a clear vision of its future and a sense of direction. Other concerns were raised as well-- a weak and non-engaged board; management "too set in its ways," and a "Baltimore-centric" attitude that has resulted in a limited membership and fundraising base in other regions of the state. As the nation's economy seems to be improving, the time has come for PM to re-emerge as a much more active and vibrant institution to serve the people of Maryland.

After a retreat in June, the board concluded that the following goals, if executed successfully, will transform PM into a much more active, visible, and engaged organization. It will assume a leadership role in advocacy, collaborating with other preservation, history, and heritage organizations in Maryland.

**GOAL 1: Implement Steps to Ensure Best Practices in Governance and Management**

PRIORITIES	ACTIVITIES	RESPONSIBILITY	TIMEFRAME	COST	TOTAL
a. Establish a governing body that is diverse, representative statewide, and has access to significant resources.	Develop a comprehensive nominations plan for implementation by the Nominating Committee.	Board Nominating Committee	Year 1		
b. Make the Nominating Committee one of PM's strongest, consisting of directors and former directors, in consultation with non-directors, with statewide prominence and access to significant resources, that is active year-round to maintain a large pool of strong board candidates selected based on careful analysis of their qualifications and PM's needs.		Nominating Committee	Year 1		
c. Ensure that all committees have a useful purpose, operate with guidance from a written description of their role, meet regularly and are held accountable for monitoring the functions of PM for which they are responsible. Each board member is expected to serve on at least one committee.	Evaluate existing board committee structure.	President Executive Director	Year 1-ongoing		
	Each committee will meet at least twice per year, and will report to the full board at least annually.		Year 1-ongoing		
	Dates for committee meetings will be set well in advance, at consistent times and included on the annual organizational calendar.	President	Year 1-ongoing		
d. Maintain regular contact with former directors and continue to engage and demonstrate appreciation for them.	Invite them to one board meeting annually and hold a special event recognizing them.	Executive Director Development Director	Year 1-ongoing	Year 1: \$3,000 2: \$3,000 3: \$3,000 4: \$3,000 5: \$3,000	\$15,000
	Hold separate meeting with former board chairs.		Year 1-ongoing		

<b>e. Review by-laws at least every five years and make changes as necessary.</b>		Executive Director Board	Year 1-ongoing		
<b>f. Establish a strong sense of “collective leadership” between staff and board, with the executive director taking the lead in all aspects of fulfilling PM’s mission, finding the support to do so in consultation with and concurrence of the board.</b>	Assign responsibility to the executive director and board president for assuring that all board meetings are productive, educational, engaging to all directors and well-attended.	President Executive Director	Year 1-ongoing		
<b>g. Hold board members collectively and staff individually accountable in their annual performance evaluations.</b>	Hold board members accountable through annual individual evaluations.	President	Year 1-ongoing		
<b>h. Ensure Board &amp; Staff act consistent with strategic plan.</b>	Cross reference strategic plan goals with Board meeting agendas. Review & update strategic plan yearly or as necessary.	Board Executive Director	Year 1-ongoing		

**GOAL 2. Ensure That Preservation Maryland’s Programs and Services Touch the Entire State of Maryland**

<b>PRIORITIES</b>	<b>ACTIVITIES</b>	<b>RESPONSIBILITY</b>	<b>TIMEFRAME</b>	<b>COST</b>	<b>TOTAL</b>
<b>a. Take a leadership role in collaborating with appropriate preservation, history, heritage, government and educational organizations statewide. (See appendix for potential partners).</b>	Become a statewide resource for preservation-related information.	Executive Director Education & Outreach Director	Year 1		
<b>b. Conduct research and regional roundtables of local preservation organizations to determine statewide needs, and interests, potential for collaboration, and areas of redundancy.</b>		Education & Outreach Director Eastern Shore Field Director	Year 1	Year 1: \$12,500 2: \$2,500 3: \$2,500 4: \$2,500 5: \$2,500	\$22,500
<b>c. Pursue partnerships for tours, special events, training and exhibitions with former properties and other local partners.</b>		Education & Outreach Director	Year 1		
<b>d. Transform the Colleagues program into a model organizational program.</b>	Produce and implement list-serve which allows Colleagues members to communicate among themselves effectively	Education & Outreach Director	Year 1 - ongoing	Year 1: \$5,500 2: \$500 3: \$500 4: \$500 5: \$500	\$7,500
	Conduct fact finding roundtable discussions in all regions of the state.		Year 1 - ongoing		
	Create and produce podcasts and webcasts.		Year 1 - ongoing		

<b>e. Re-establish an annual preservation and revitalization conference in partnership with other organizations as appropriate.</b>		Education & Outreach Director Conference Steering Committee	Year 1 - ongoing	Year 1: \$7,100 2: \$7,300 3: \$7,500 4: \$7,800 5: \$8,000	\$37,700
<b>f. Focus and enhance preservation and field services in underserved regions throughout the state, while also increasing the capacity of the preservation movement and enhancing the visibility of Preservation Maryland by assisting existing organizations on key projects and initiatives.</b>	Provide staff for field services statewide, focusing initially upon the Eastern Shore, Western Maryland, and Southern Maryland. To be implemented by a Field Representative Program based in Preservation Maryland's headquarters.	Executive Director PM Staff Field Representative Staff	Year 1 - ongoing*	Year 1: \$80,000 2: \$84,000 3: \$88,200 4: \$92,600 5: \$97,200	\$442,000
* The Field Rep program will be implemented in a deficit neutral manner.					
<b>g. Redesign Endangered Maryland program to increase nominations, visibility, and support of selected sites.</b>		Education & Outreach Director Endangered Md Selection Committee	Year 1 - ongoing		
<b>h. Evaluate effectiveness of Heritage Fund grant program including funding cycles, size of grants, number of grants and publicity for the program and the projects it funds.</b>	Increase corpus of fund to gain impact for the program.	Heritage Fund Selection Committee Preservation Services Director	Year 2- ongoing		
<b>i. Create and implement program(s) targeted for K-12 students, such as photography or essay contests or curriculum.</b>			Year 3		
<b>j. Create African American preservation program</b>	Investigate potential partners and collaborations.	Preservation Services Director Intern	Year 1		
	Develop and implement programming in conjunction with partners.	Preservation Services Director Intern	Year 2- ongoing		

**GOAL 3. Increase Visibility and Image of Preservation Maryland to Better Serve the Citizens of Maryland**

PRIORITIES	ACTIVITIES	RESPONSIBILITY	TIMEFRAME	COST	TOTAL
a. Identify and relocate to new headquarters location.		Headquarters Search Committee	Year 1- 2		
b. Develop a new marketing plan that enhances the Preservation Maryland brand, reaches beyond current members and supporters and dedicate resources for its implementation.	Hire full-time marketing professional to oversee public relations, communications and marketing, including social media.		Year 1- ongoing	Year 1: \$49,000 2: \$84,000 3: \$88,200 4: \$92,600 5: \$97,200	\$411,000
c. Create committee of the board whose function is to increase visibility and image of the organization.		President Marketing Committee	Year 1- ongoing		
d. Develop signature programs for target audiences such as professional educators, Next Gens, environmentalists, do-it-yourselfers, rehabbers etc.		Marketing Director Marketing Committee	Year 2-5	Year 2: \$2,000 3: \$2,000 4: \$2,000 5: \$2,000	\$8,000

**GOAL 4. Assume a Leadership Role in Advocacy That Will Enhance PM's Reputation**

PRIORITIES	ACTIVITIES	RESPONSIBILITY	TIMEFRAME	COST	TOTAL
a. Adopt proactive positions on issues to positively affect community revitalization and development projects for developers and the preservation community.		Executive Director	Year 1- ongoing		
b. Identify successful adaptive reuse projects using historic tax credits and use all available resources to publicize the success of the projects.		Preservation Services Director Marketing Director	Year 1- ongoing		
c. Conduct a charette where local officials, preservation professionals, planners, architects, and developers would be invited to focus on strategies for preserving endangered resource(s).		Preservation Services Director Education & Outreach Director	Year 1- ongoing		
d. Develop a program with dedicated staff to educate and assist owners of historic buildings and property, particularly small business operators, in understanding the economic feasibility and advantages of restoring old buildings for modern use.		Preservation Services Director	Year 1- ongoing		
e. Lead the effort to partner with the Maryland Historical Trust and other organizations to lobby and promote the expansion of the historic tax credit program and other preservation-related public policy issues.	Convene an annual lobby day in Annapolis in support of funding for preservation needs and other preservation-related public policy measures.	Executive Director Board	Year 1- ongoing	Year 1: \$5,000 2: \$5,000 3: \$5,000 4: \$5,000 5: \$5,000	\$25,000
f. Influence the Maryland Historical Trust to update and make consistent guidelines for the application of the Secretary of the Interior's preservation.		Executive Director	Year 1- ongoing		
g. Explore the creation of a political action committee [501(c)(4)] with an auxiliary board and/or lobbyist to administer.		Board Executive Director	Year 2-ongoing	Year 2: \$35,000 3: \$35,000 4: \$35,000 5: \$35,000	\$140,000

**GOAL 5. Achieve Financial Sustainability by Increasing Sources of Revenue and Providing Proper Stewardship of All Assets**

PRIORITIES	ACTIVITIES	RESPONSIBILITY	TIMEFRAME	COST	TOTAL
a. Achieve financial sustainability by increasing and diversifying sources of earned income.	Develop a full menu of educational and recreational activities including conferences, workshops, architectural field trips and lectures.	Board Executive Director	Year 1-Year 5	Year 1: \$3,000 2: \$3,000 3: \$3,000 4: \$3,000 5: \$3,000	\$15,000
	Develop on-line directory* of preservation service providers and vendors accessible for a fee.	Preservation Services Director Development Director	Year 1		
	*This was completed by the Maryland Assoc. of Hist. District Commissions. PM should partner, not duplicate.				
b. Update and enhance the development program, particularly donor cultivation by board members and the executive director and membership acquisition and retention.	Hire fulltime development director to write development plan for meeting on going expenses and the financial requirements of the strategic plan and case statement(s) as needed to attract prospects.	Executive Director Development Committee	Year 1-ongoing	Year 1: \$36,000 2: \$37,800 3: \$39,700 4: \$41,700 5: \$43,800	\$199,000
	Additional \$3000 per year budget for printing/publications needed to enhance development return		Year 1-ongoing	Year 1: \$3,000 2: \$3,000 3: \$3,000 4: \$3,000 5: \$3,000	\$15,000
	Provide development training to board and appropriate staff.	Development Committee Development Director	Year 1		
	Enhance planned giving program.	Development Director	Year 1		
c. Capitalize on sustainability and community/economic development efforts in seeking grants, forming partnerships where possible with other organizations in securing funding and implementing programs.		Development Director Development Committee			
d. Replace funds expended from investment account to initiate strategic planning action steps.		Board, Development Committee	Year 1-Year 5		
e. Acquire and mine appropriate sources of data to further donor cultivation & advocacy.	Identify funding for data acquisition and implementation.	Executive Director Dir. of Development	Year 2-5		
f. Identify and develop entrepreneurial opportunities.		Executive Director	Ongoing		
<b>Estimated Cost of Strategic Planning Goals</b>					<b>\$1,337,700</b>