INSTITUTIONAL PLAN
2015 - 2018

Culture and Heritage Museums
York County, South Carolina

Approved by Commission
February 23, 2015
Culture and Heritage Museums

Mission Statement
The mission of the Culture and Heritage Museums is to communicate and preserve the natural and cultural histories of the Carolina Piedmont, inspiring a lifetime of learning.

Vision Statement
We seek to create a community that greatly values natural, historical, and cultural resources.

Introduction
The Culture & Heritage Museums is a family of museums in York County, South Carolina, which includes Historic Brattonsville in McConnells, the Museum of York County and the Main Street Children's Museum in Rock Hill, and the Historical Center of York County and the Lowry Family Theater in York.

Each of the museum sites serves the larger organizational mission in its own unique manner. The museum system is established as 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 Commissioners are appointed by the York County Council and represent each of the seven districts of the county.

Over the past three 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 are at the heart of this Institutional Plan.

Since 2011 broad-based support for the museum has grown. On-site visitation is up at all four sites and overall attendance is up 26%. Income from general membership is up 28%. At the same time we have made more efficient use of resources as operating expenses have been reduced by 22%. 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 McElvey School, and the renovation of the McElvey 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 in-house natural history exhibition received awards from both the South Carolina Museum Federation and the Southeastern Museum Conference. New programs like “Countdown to Kindergarten” and “Spirits and Stories” have greatly exceeded attendance expectations. Other projects that will figure prominently in our future like the Restoration of the Brick House at Historic Brattonsville and the new anchor exhibition at the Museum of York County are underway with varying stages of progress. Within the next two months the organization will have completed the Comprehensive Interpretive Plan for Historic Brattonsville and a system-wide Capital Projects Plan. These planning projects have focused on existing Strategic Initiatives. They are intended to compliment and further inform the Institutional Plan.
This Institutional Plan is the culmination of past planning and progress that have prepared us to move forward with ambitious but achievable goals and initiatives. The current process of creating the plan has provided focus to our efforts and has allowed us to better articulate a road map for achieving our goals. Project Coordinators should include progress reports on the individual action steps in monthly reports to the director who will keep the Commissioners apprised of significant issues. The plan should be reviewed annually by the Commission and managers. Revisions and updates should be made when appropriate.

The plan is not intended to be an exhaustive overview of all of our programs and support activities. We have a long history of daily activities and annual events that we believe have added to the quality of life of our community and these will continue. Instead, this is a plan that will allow us to strengthen our efforts and more effectively accomplish our mission of communicating and preserving the natural and cultural histories of the Carolina Piedmont while inspiring a lifetime of learning.

Glossary of Terms
This document incorporates elements that are consistent with the American Alliance of Museum’s expectations of an Institutional Plan. Since no two plans are alike, it may be helpful to include some clarification of our specific usage.

Goals: We have included seven goals that we believe will make better use of our resources in accomplishing our mission. The goals represent what we want to do and the reasons that we are taking on the initiatives.

Strategic Initiatives: The initiatives represent efforts that we have chosen to take on that will enable us to achieve our goals.

Site: This heading states which of the Culture and Heritage Museum sites will take on the initiative or that the initiative is general.

Project Coordinator: The initiatives can be multi-faceted and responsibilities will often be shared by two or more individuals or departments. The term “project coordinator” as used here indicates the person (or persons) responsible for facilitating project team meetings and tracking and reporting the progress of the project to the Executive Director. The Executive Director is responsible for ensuring interdepartmental coordination and incorporating appropriate information into reports to the Commissioners.

Target Completion Dates: The dates offered in this report represent targets for accomplishment of the particular initiative. They also provide an anticipated order of project completion. Organizational values should not be compromised to meet the target dates. It is understood that there are often unforeseen variables that will impact completion. In particular, the target dates for projects that include additional planning will need to be revised as part of that process. Although delays are often inevitable, the Executive Director should keep the Commission apprised of any changes in targeted completion dates including reasons for the change.

Required Resources: As used here, required resources include the general categories of what is needed to make the project succeed. While these resources usually require funding in some form, the funds themselves are included under other headings.
**Estimated Total New Costs:** The number offered under this heading represents the impact on the budget over and above current operating funds. Allocation of current funding amounts, including commitments of staff time, has not been entered as “new” costs. Significant reallocation of existing funds is included in parentheses. In most cases, estimated total new costs should not be considered exact. This caveat is especially true of projects that still will undergo a planning process. Organizational values should not be casualties of a desire to meet cost estimates. The Executive Director will report significant deviations and the reasons for them to the Commission as soon as the changes are understood. Once formal budgets are approved revisions will require action of the Commission.

**Sources of Funding:** This category states how the initiatives will be funded. Most of the capital initiatives will draw from a new $8 million fund established in January at the Foundation for the Carolinas exclusively for capital projects of the Culture and Heritage Museums. In several initiatives project expenses will simply require continuation of current funding levels in the operating budget. This continuation is especially true in covering staff time which may require shifting of priorities but will not necessitate a budgetary increase. Two of the initiatives will require an increase from the current operating budget. These increases are modest and will come from a combination of several sources. Still, it will be necessary to be proactive in efforts to increase funding from the various categories.

**Measure of Success:** Measure of Success indicates the things that need to happen to know the initiative has been accomplished effectively.

**Action Steps:** Action steps are included in Appendix A following the strategic initiatives. They represent specific efforts that will be necessary to accomplish the initiative. They are tactical by nature and largely represent the work of the staff. When applicable the action steps of each initiative are offered in the sequential order that will be required.
Culture and Heritage Museums
Site Mission Statements

**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.
Culture and Heritage Museums
Statement of Organizational Values

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. To this end we have adopted the “Donor Bill of Rights” as set forth by the Association of Fundraising Professionals. ¹

¹ A copy of “A Donor Bill of Rights” is Included with permission from the Association of Fundraising Professionals as Appendix B.
Culture and Heritage Museums
Goals

**Goal I:** Further align exhibitions, programming, and collections to the stories of the Carolina Piedmont and the respective missions of each site.

**Goal II:** Strengthen the position of Historic Brattonsville as a regional destination for heritage education and tourism through capital improvements and accompanying programmatic growth.

**Goal III:** Strengthen the position of the Main Street Children’s Museum as a community leader in early childhood education.

**Goal IV:** Strengthen the institutional role of the McElvey Center

**Goal V:** Demonstrate adherence to the highest standards of the museum profession through preparation and successful completion of the American Alliance of Museum’s process for reaccreditation.

**Goal VI:** Generate positive and meaningful brand awareness.

**Goal VII:** Continue and improve quality programming and services.
Culture and Heritage Museums
Strategic Initiatives

Goal I: *Further align exhibitions, programming, and collections to the stories of the Carolina Piedmont and the respective missions of each site.*

Strategic Initiative I – A:
*Create a new permanent anchor exhibition at the Museum of York County that applies global principles and analogies to the natural history of the Carolina Piedmont.*

Phase One - Exhibition Planning, Design, and Building Preparation:

Site: Museum of York County

Project Coordinator: Teresa Armour, Exhibitions Manager

Target Completion Date: September 2016

Required Resources: External designers, contractors; staff planning, review, and oversight

Estimated Total New Cost: $500,000

Sources of Funding: Capital projects fund; allocation of budgeted staff time

Measures of Success: Planning, design, and building preparation meet organizational expectations and are completed within the final budget. The project is ready to move to the construction and fabrication phase by the target completion date.

Phase Two - Exhibition Construction and Fabrication:

Site: Museum of York County

Project Coordinator: Teresa Armour, Exhibitions Manager

Target Completion Date: December 2017

Required Resources: External designers, fabricators and contractors; staff planning, oversight, and some exhibit preparation; material from the CHC Collections; and educational resources

Estimated Cost: $2,000,000

Sources of Funding: Capital projects fund; allocation of budgeted staff time

Measures of Success: The exhibition meets established interpretive objectives and presents accurate and educational information in an aesthetically appealing manner that meets organizational expectations. Positive audience reaction is seen through attendance growth and audience surveys. The project is completed within the budget and timeframe established during the planning and design phase.
Strategic Initiative I – B:
Ensure that the collections and related expenditure of resources more accurately reflect a commitment to the mission. This strategic initiative will include a collecting plan to guide future accessions and a deaccession plan.

Collecting and Deaccession Plans:
Site: Historical Center of York County, Museum of York County, Historic Brattonsville
Project Coordinator: Latasha Richards, Collections Manager; Nancy Sambets, Director of Archives
Target Completion Date: June 2017
Required Resources: External consultant, staff time
Estimated Total New Cost: $0 ($9,600 Reallocation)
Sources of Funding: Allocation of budgeted staff time and reallocation of existing funds to cover the cost of external consulting. Income from the newly established Friends of the Museum of York County Endowment should also be available for collections care beginning in January 2016 if needed.
Measures of Success: This initiative will be successful when the major tasks specified in the action plan including mission rating, inventory of the Ethnographic Collection, draft and approval of new Collecting and Deaccession Plans, and Object Classification at Historic Brattonsville are completed within budget by the target completion date.

Strategic Initiative I – C:
Launch enhancement of the Carolina Piedmont specimens collection including design and construction of a fluid preservation room that meets all appropriate codes and standards.

Fluid Preservation Room for Natural History Collection:
Site: Museum of York County
Project Coordinator: Steve Fields, Curator of Natural History
Target Completion Date: June 2017
Required Resources: Architectural and engineering consultants; contractor; staff oversight
Estimated Total New Cost: $175,000
Sources of Funding: Capital projects fund; allocation of budgeted staff time
Measures of Success: The new room is ready to accept specimens as examples of the fauna of the Carolina Piedmont for long term preservation as well as for research, exhibition, and demonstration. The project has been completed within the final budget by the target completion date as established during the design process. The room complies with all necessary codes and safety and preservation standards. CHM’s Curator of Natural History will evaluate the initiative using standards consistent with the American Alliance of Museums and the Society for the Preservation of Natural History Collections.
Culture and Heritage Museums
Strategic Initiatives

Goal II: **Strengthen the position of Historic Brattonsville as a regional destination for heritage education and tourism through capital improvements and accompanying programmatic growth.**

**Strategic Initiative II – A:**
*Complete the Comprehensive Interpretive Plan for Historic Brattonsville including Master Site Plan and Furnishing Plans.*

**HB Comprehensive Interpretive Plan:**
*Site: Historic Brattonsville*
*Project Coordinator: Carey Tilley, Executive Director*
*Target Completion Date: April 2015 (95% complete)*
*Required Resources: Staff review, writing, and editing*
*Estimated Total New Costs: $0*
*Source of Funding: allocation of budgeted staff time*

**Measures of Success:** Completion, review and approval of the Comprehensive Interpretive Plan by the target completion date. The document meets organizational expectations and appropriately informs the creation of a Master Site Plan.

**HB Master Site Plan:**
*Site: Historic Brattonsville*
*Project Coordinator: Kevin Lynch, Site Manager - Historic Brattonville*
*Target Completion Date: December 2015*
*Required Resources: External consultants; staff review and project oversight*
*Estimated Total New Cost: $95,000*
*Source of Funding: Capital projects fund, allocation of budgeted staff time.*

**Measures of Success:** Completion, review, and approval of the Master Site Plan within the final budget and by the target completion date. The document meets organizational expectations and includes the necessary components to inform final design, budget, phasing, and timeline for implementation of the Comprehensive Interpretive Plan.
HB Furnishings Plans:
Site: Historic Brattonsville

Project Coordinator: Kevin Lynch, Site Manager - Historic Brattonsville

Target Completion Date: June 2018 (six distinct projects with completion dates beginning in April of 2015)

Required Resources: External consultants; staff review and project oversight

Estimated Total New Cost: $50,000

Source of Funding: Capital projects fund, Friends of Historic Brattonsville, budgeted capital expenditures, other grants and special funding requests, allocation of budgeted staff time

Measures of Success: Completion of each Furnishing Plan within budget by the target completion date of its corresponding interpretive area as established by the Master Site Plan. Furnishing plans extensively cite appropriate and credible primary and secondary sources. Furnishings of each interpretive area accurately portray the time period, region, and economic and social status of its subject matter.

Strategic Initiative II – B:
Submit nomination for the extension of the boundaries of the National Register Historic District.

National Register Boundary Expansion Nomination:
Site: Historic Brattonsville

Project Coordinator: Michael Scoggins, Historian

Target Completion Date: October 2015

Required Resources: Staff writing, review, and editing; external review; NPS decision

Estimated Total New Cost: $0

Source of Funding: Allocation of budgeted staff time

Measures of Success: Submission of nomination following consultations with the National Park Service, formal review by the South Carolina State Historic Preservation Office, and extensive internal review and response. Ultimate success will be demonstrated by the National Park Service’s acceptance of the expanded boundaries.
Strategic Initiative II – C:
*Continue the Brick House restoration at Historic Brattonsville according to identified preservation and programming needs.*

**Complete Brick House Restoration:**

**Site:** Historic Brattonsville  
**Project Coordinator:** Shawn Beckwith, Preservation Coordinator  
**Target Completion Date:** August 2016  
**Required Resources:** Architectural and engineering consultants, restoration contractors, materials, analysis, staff analysis and oversight, state-level review  
**Estimated Total New Cost:** $500,000 (This cost is included in estimated total costs for II-E.)  
**Source of Funding:** Capital projects fund, Robert Haywood Morrison Foundation Grant, potentially public grants and private contributions, allocation of budgeted staff time  
**Measures of Success:** The restoration of the Brick House complies with the Secretary of the Interior’s Standards for Restoration, meets organizational expectations, and supports interpretive objectives established by the Interpretive Plan. The project is completed within the budget and timeframe established during the planning process.

Strategic Initiative II – D:
*Increase focus on the Revolutionary War Period significance at Historic Brattonsville with the addition of a 1780 Farm interpretive area.*

**1780 Farm Interpretive Area:**

**Site:** Historic Brattonsville  
**Project Coordinator:** Kevin Lynch, Site Manager - Historic Brattonsville  
**Target Completion Date:** January 2017  
**Required Resources:** Contractor, materials, staff time for review and oversight  
**Estimated Total New Cost:** $425,000 (This cost is included in estimated total costs for II – E.)  
**Source of Funding:** Capital Projects Fund, allocation of budgeted staff time  
**Measures of Success:** The 1780 Farm and its furnishings provide an accurate setting in which to interpret the lives of a Scots-Irish family in the Carolina Backcountry in the late 18th Century. The project meets interpret goals and organizational expectations. The farm is completed within the budget and timeframe established during the planning process.
Strategic Initiative II – E:
Implement the components of the Interpretive Plan in successive phases.

Capital Projects Implementation:
Site: Historic Brattonsville
Project Coordinator: Kevin Lynch, Site Manager - Historic Brattonsville
Target Completion Date: June 2020 (all phases)
Required Resources: External design teams, consultants, and contractors; materials, historic structures; staff oversight and labor
Estimated Total New Cost: $4 million (Includes costs of II-C and II-D)
Source of Funding: Capital projects fund; allocation of budgeted staff time
Measures of Success: Each interpretive area is historically accurate and effectively tells its part of the story of the Brattonsville community and Carolina Piedmont in a manner consistent with the objectives of the Interpretive Plan. Restoration and preservation of original structures and landscape comply with applicable Secretary of the Interior’s preservation standards. Each phase of the Interpretive Plan is completed within budget and timeframe established during the planning process.

Strategic Initiative II – F:
Plan and implement programming changes to capitalize on site improvements and expand staff as necessary to keep pace with capital improvements as they are implemented.

Programmatic Growth at Historic Brattonsville
Site: Historic Brattonsville
Project Coordinator: Kevin Lynch, Site Manager - Historic Brattonsville
Target Completion Date: July 2020
Required Resources: 3-5 FTE new staff positions by July 2020; reallocation of existing staff time
Estimated Total New Cost: $200,000 per year by July 2020
Source of Funding: Cumulative 5% growth in annual operating budget by 2020 through anticipated growth in earned income, membership, contributed income, and county population growth. Other programmatic changes will involve reallocation of budgeted staff time and existing operating funds.
Measures of Success: New programming is created to utilize capital improvements and to meet the objectives of the Comprehensive 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.
Culture and Heritage Museums
Strategic Initiatives

Goal III: **Strengthen the position of the Main Street Children’s Museum as a community leader in early childhood education.**

**Strategic Initiative III – A:**
*Provide adequate staffing to serve growing visitation at Main Street Children’s Museum.*

**Meet Staffing Needs:**
**Site:** Main Street Children’s Museum
**Project Coordinator:** Cate Crane, Site Manager - Museum of York County and Main Street Children’s Museum
**Target Completion Date:** August 2015
**Required Resources:** 20-25 hours of new staff time
**Estimated Total New Cost:** $17,000 to $21,000
**Sources of Funding:** 0.5% growth in annual operating budget from current level through anticipated growth in earned income, membership, contributed income, and county population growth.
**Measures of Success:** Additional hours and associated costs are included in the annual operating budget. The new position is filled or hours are assigned to an existing part-time position.

**Strategic Initiative III – B:**
*Increase awareness within the community and provide accessibility to underserved audiences.*

**Community Awareness and Accessibility:**
**Site:** Main Street Children’s Museum
**Project Coordinator:** Cate Crane, Site Manager - Museum of York County and Main Street Children’s Museum
**Target Completion Date:** Ongoing
**Required Resources:** Contracted services; staff planning and implementation
**Estimated Total New Cost:** $0
**Sources of Funding:** Allocation of funds within the current budget which are covered through grants, sponsorships, in-kind donations, and allocation of budgeted staff time.
**Measures of Success:** Community programs at Main Street Children’s Museums are executed as planned and within projected budget while reaching growing audiences. Surveys are circulated and receive positive and helpful responses.
Culture and Heritage Museums
Strategic Initiatives

Goal IV: Strengthen the institutional role of the McCellvey Center

Strategic Initiative IV – A:
Complete the move of the archives, collections and research area to the Historical Center of York County.

Collections and Archives Move:
Site: Historical Center of York County

Project Coordinators: Latasha Richards, Collections Manager; Nancy Sambets, Director of Archives

Target Completion Date: May 2016

Required Resources: Staff implementation; assistance from York County governmental departments

Estimated Total New Cost: $0 ($3,000 reallocation of funds in existing budget)

Sources of Funding: Allocation of budgeted staff time and the reallocation of $3,000 of currently budgeted funds.

Measures of Success: HVAC system is meeting all target ranges and all items slated for relocation to the Historical Center have been moved with their updated locations entered into their respective databases. All off-site storage location will have been eliminated.

Strategic Initiative IV – B:
Define the future role of the McCelvey School in advancing the mission of the Culture and Heritage Museums.

Future of McCelvey Center:
Site: Historical Center of York County (McCelvey School)

Project Coordinator: Carey Tilley, Executive Director

Target Completion Date: February 2016

Required Resources: Staff coordination and planning; input from volunteers, stakeholders, and County representatives

Estimated Total New Cost: $0

Sources of Funding: Allocation of budgeted staff time; in-kind contribution of time

Measures of Success: A new plan for the use of the McCelvey School is defined including preliminary cost estimates and timelines.

2 The timing of the completion of the move of collections and archival material to the Historical Center is contingent upon resolution of a design flaw in the HVAC units of the new facility.
Culture and Heritage Museums
Strategic Initiatives

Goal V: Demonstrate adherence to the highest standards of the museum profession through preparation and successful completion of the American Alliance of Museum’s process for reaccreditation.

Strategic Initiative V – A: Key staff will meet specific targets and adhere to established time lines on the road to re-accreditation.

AAM Reaccreditation Project:
Site: All
Project Coordinator: Latasha Richards, Collections Manager
Target Completion Date: Determination will be in 2016 (Self Study due March 1, 2015, Site Visit is July 2015)
Required Resources: Staff implementation and review; required fees; review team
Estimated Total New Cost: $0 ($3,000 from reallocation of existing budget)
Sources of Funding: Allocation of budgeted staff time; reallocation of budgeted resources to cover the expenses of the review team
Measures of Success: Successful completion of the project will be measured by a positive evaluation report by the peer reviewers and formal determination that we are eligible for Re-Accreditation by the American Alliance of Museums.
Culture and Heritage Museums
Strategic Initiatives

Goal VI: Generate positive and meaningful brand awareness.

Strategic Initiative VI – A: Implement site-specific branding.

Site-Specific Branding:

Site: All

Project Coordinator: Richard Campbell, Business Manager

Target Completion Date: June 2017

Required Resources: External consultants; external review; staff review, oversight and implementation

Estimated Total New Cost: $0 (allocation of $40,000 per year for the next three years from funds currently in the marketing budget for branding)

Sources of Funding: The existing $40,000 item in the current marketing budget will need to be continued over the next two fiscal years. Funds in year three (FYE 2017) will need to be reallocated from planning and design to implementations. Allocation of budgeted staff time

Measures of Success: A branding plan is developed and launched for each site that meets professional standards and organizational objectives. The plans are completed within the final total budget and all are ready for launch on or before the target completion dates established during the planning process.

3 The timing of this project is contingent upon institutional decisions about the identity of the Museum of York County and the future role of the McTelvey School.
Strategic Initiative VI – B: 
*Play a leadership role in initiating the Southern Revolutionary War National Heritage Corridor.*

**Southern Revolutionary War National Heritage Corridor:**

**Site:** Historical Center of York County

**Project Coordinator:** Michael Scoggins, Historian

**Target Completion Date:** Three years following Congressional Approval

**Required Resources:** Contracted Program Coordinator; staff oversight, review, and coordination; extensive external in-kind support and matching funds.

**Estimated Total New Cost:** c. $560,000 (c. $187,000 per year)

**Sources of Funding:** Federal grant of $335,000 ($145,000 per year for three years), external matching funds from stakeholders and outside groups and individuals; reallocation of budgeted staff time, in-kind contributions of time and resources from external stakeholders

**Measures of Success:** The creation of a management plan that meets the criteria of the National Park Service that is within the final budget and completed within the three-year timeline. All required matching funds are generated from external sources. Ultimate success will be measured by congressional approval of the plan and the creation of the National Heritage Corridor.

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4 The Southern Revolution National Heritage Corridor has been approved by the National Park Service and recommended by the Secretary of the Interior to the U.S. Congress. We have been named the coordinating entity. It is currently at the committee level. If passed, we will have three years to coordinate the development of a Management Plan which will require additional Congressional approval before the corridor is created.
Culture and Heritage Museums
Strategic Initiatives

Goal VII: Continue and improve quality programming and services.

Strategic Initiative VII – A:
Maintain the quality of ongoing programs, special events, daily public activities, volunteer services, and facilities maintenance while continuing to seek ways to improve all activities through internal and external evaluation.

Quality and Evaluation:
Site: All

Project Coordinator: Cate Crane, Site Manager - Museum of York County and Main Street Children’s Museum; Richard Campbell, Business Manager

Target Completion Date: Ongoing

Required Resources: Staff planning, review, oversight, and implementation; visitor feedback

Estimated Total New Cost: $0

Sources of Funding: allocation of budgeted staff time

Measures of Success: All activities, including volunteer services, are formally reviewed by staff annually at each site incorporating audience response elements such as attendance growth and formal surveys. Cyclical maintenance and improvement plans are created and followed. The plans are reviewed annually and revised as needed.
Culture and Heritage Museums

Action Steps

Appendix A: Plan of Action
This section presents the major tactical steps necessary to achieve each strategic initiative. When applicable, the steps are presented in a required or optimal chronological sequence. Within the organization, it is understood that the tactics will often need to be flexible to adapt to unforeseen contingencies but it is expected that the strategic initiatives will remain consistent. With few exceptions the tactical steps will be executed by staff. Significant deviations that will potentially impact the success of the strategic initiative, including changes in cost estimates and target completion dates, will be reported to the Commission. Managers have created more detailed work plans as appropriate for their specific departments that are not presented here.

Strategic Initiative I – A: Create a new permanent anchor exhibition at the Museum of York County that applies global principles and analogies to the natural history of the Carolina Piedmont.

Phase One - Exhibition Planning, Design, and Building Preparation

Action Steps:
- Complete an interpretive plan defining the overall storyline, scope of work, projected budget and timeline using an internal exhibition team lead by the Exhibits Manager and the Curator of Natural History.
- Secure funding through the CHC capital projects fund for concept/design and structural survey.
- Select an architectural/exhibit design team informed by RFQ and the interpretive plan.
- Complete design work and a comprehensive budget. The process will include formal audience evaluation of conceptual design using contracted services.
- Complete necessary building mechanical and structural modifications.

Phase Two - Exhibition Construction and Fabrication

Action Steps:
- Secure Funding through the CHC Capital Projects Fund for exhibition construction and fabrication.
- Release Request for Proposals (RFP) and bid package for construction and exhibit fabrication.
- Select contractor and fabricator, designate components for in-house and contracted fabrication.
- Complete exhibition construction and open exhibition to the public.
Strategic Initiatives I – B: Ensure that the collections and archives and related expenditure of resources more accurately reflect a commitment to the mission. This strategic initiative will include a collecting plan to guide future accessioning and a deaccession plan.

Alignment of Collections and Archives with Mission:

Action Steps:

Classify items at Historic Brattonsville as living history, exhibit, or permanent collections and take steps to ensure appropriate use and care.

Assign a mission rating to all archival material, art, and historic objects in collections.

Complete inventory of ethnographic collection using a consultant specializing in African Ethnographic material.

Take steps to ensure appropriate use and care of the collection.

Draft a Collecting Plan for review and approval.

Revise a formal Deaccession Plan for review and approval.

Follow the Deaccession Plan to deaccession items that are not related to the mission or are in poor condition and not viable candidates for conservation.

Strategic Initiative I – C: Launch enhancement of the Carolina Piedmont specimens collection including design and construction of a fluid preservation room that meets all appropriate codes and standards.

Fluid Preservation Room for Natural History Collections:

Action Steps:

Refine cost estimates, create scope for design, and secure funding for designing and building a 900 square-foot stand-alone Fluid Preservation Room on the property of the Museum of York County.

Select architect and engineer for design.

Complete design and construction documents.

Complete Fluid Preservation Room and begin collecting and accepting appropriate specimens.
Culture and Heritage Museums
Action Steps

Strategic Initiative II – A: Complete the Comprehensive Interpretive Plan for Historic Brattonsville including a Master Site Plan and Furnishings Plans.

HB Comprehensive Interpretive Plan:
Action Steps:
Finalize the Interpretive Plan and present it to the Commission for approval.

HB Master Site Plan
Action Steps:
Consult with the National Park Service and the State Historic Preservation Office to finalize the location of the expanded boundary to be nominated for the National Register Historic District revision.
Secure funding through the CHC Capital Projects Fund for the Master Site Plan.
Select a qualified master planning team using the scope of work informed by the Interpretive Plan.
Complete the Master Site Plan including conceptual site layout. This process will include formal audience evaluation of conceptual design.

HB Furnishings Plans
Action Steps:
Secure funding.
Select consultants.
Complete Furnishings Plans for each of the key interpretive areas identified in the Comprehensive Interpretive Plan.
Strategic Initiative II – B: *Submit a nomination for the extension of the boundaries of the National Register Historic District.*

**National Register Boundary Expansion Nomination:**

**Action Steps:**

Create a map showing historic structures, archaeological features, significant landscape features and proposed expansion of the National Register Historic District boundaries.

Meet with the National Park Service regarding expansions of the National Register District and receive approval to move forward with the nomination.

Complete the draft nomination following internal review and any necessary revisions.

Submit to South Carolina State Historic Preservation Office for review and comment.

Complete internal revisions and final review.

Submit the formal nomination to the National Park Service.

Strategic Initiative II – C: *Continue the Brick House restoration at Historic Brattonsville according to identified preservation and programming needs.*

**Brick House Restoration Project:**

**Action Steps:**

Complete necessary analysis and any remaining design.

Restore exterior of the wood addition.

Restore building interior and front façade.

Open the Brick House to the public with new interpretation, programming, furnishings, and appropriate staffing.

Strategic Initiative II – D: *Increase focus on the Revolutionary War Period significance at Historic Brattonsville with the addition of a 1780 Farm interpretive area.*

**1780 Farm Interpretive Area:**

**Action Steps:**

Secure funding through the capital projects fund for construction and furnishings.

Complete the National Register Expanded Boundary Nomination and Master Site Plan to determine the final location of the 1780 Farm and the potential relocation of the building currently used for “Academy” programs.

Prepare the selected site including any necessary archaeological studies.

Select a contractor and build a reproduction log home and outbuildings.

Furnish the structures and site, prepare fields and landscape, and acquire and house appropriate farm animals.

Open the 1780 Farm.
Strategic Initiative II – E: **Implement the components of the Comprehensive Interpretive Plan in successive phases.**

**Capital Projects Implementation:**

**Action Steps:**
- Finalize design and construction documents using the Master Site Plan.
- Secure funding in phases through the CHC Capital Projects Fund.
- Implement the Interpretive Plan in successive phases as determined in the planning process including completion of the interpretive areas, education areas, visitor amenities, circulation routes, and staff support areas.

Strategic Initiative II – F: **Plan and implement programming changes to capitalize on site improvements and expand staff as necessary to keep pace with capital improvements as they are implemented.**

**Programmatic Growth:**

**Action Steps:**
- Plan and implement new program elements with each phase of the Master Site Plan.
- Add three to five additional full-time equivalent positions to keep pace with the new interpretive areas as they are completed over the next five years.
- Hire a Historic Farmer as one of the new positions and increase utilization of historic fields and farm animals in programming.
- As staff grows, dedicate significant staff time to site-specific volunteer coordination.
Culture and Heritage Museums

Action Steps

Strategic Initiative III – A: *Provide adequate staffing to serve growing visitation at Main Street Children’s Museum.*

Meet Growing Staffing Needs:

**Action Steps:**
Add twenty to twenty-five hours to total staff time.
Continue to monitor growth to ensure that adequate staffing is available.

Strategic Initiative III – B: *Continue to raise awareness within the community and provide accessibility to underserved audiences.*

Community Awareness and Accessibility:

**Action Steps:**
Continue Countdown to Kindergarten.
Participate in major city-wide festivals (“ChristmasVille” & “Come-See-Me”).
Collaborate with grant partners to create an IMLS-Funded Traveling Exhibition to reach a larger audience.
Provide accessibility via grant funding to underserved children in partnership with York and Lancaster County First Steps.
Culture and Heritage Museums
Action Steps

Strategic Initiative IV – A: Complete the move of the archives and collections to the Historical Center of York County.

Collections and Archives Move:
Action Steps:
Move collections objects from offsite storage to the Historical Center.
Work with the County and project architect to resolve design issues with the HVAC system of the new facility to make sure it hits targeted humidity and temperature ranges as specified in original contract documents.
Finalize the remaining items on the project warranty log and the York County task list.
Move collections objects and archival material currently still stored in the McCelvey Center and at the Cotton Factory to the Historical Center as soon as HVAC design issues are resolved.

Strategic Initiative IV – B: Define the future role of the McCelvey School in advancing the mission of the Culture and Heritage Museums.

Future use of the McCelvey School:
Action Steps:
Continue to use the Lowry Family Theater as a venue for community enrichment.
Complete the move of collections and archives as described in Strategic Initiative 4-A
Develop a plan for exhibits, programs, collections and administrative use for the McCelvey School that includes preliminary projected costs and timelines and incorporates community input.
Culture and Heritage Museums
Action Steps

Strategic Initiative V – A: Key staff will meet specific targets and adhere to established time lines on the road to re-accreditation.

AAM Accreditation:
Action Steps:
Submit Self-Study Questionnaire online by March 1, 2015.
Address any remaining issues by spring of 2015.
Sites prepare throughout the first half of 2015 for AAM site visit in July or August 2015.
CHM reviewed by Accreditation Committee in October 2015
Decision on re-accreditation will be made in 2016.
Culture and Heritage Museums
Action Steps

Strategic Initiative VI – A: **Implement site-specific branding.**

Site-Specific Branding:

**Action Steps:**
- Clarify the identity of the Museum of York County.
- Define the future role of the McElvey School Building.
- Select and hire branding consultants.
- Branding agency will conduct research including meetings, focus groups, interviews, surveys, and secondary research with a focus on listening to our target audiences.
- Branding agency will complete a strategic branding brief outlining the strategy developed for each brand.
- Branding agency will complete a creative brief to guide the creative elements that distinguish each of our brands (logos, taglines, graphic themes, etc.).
- Complete branding project and implement changes.

Strategic Initiative VI – B: **Play a leadership role in initiating the Southern Revolutionary War National Heritage Corridor.**

Southern Revolutionary War NHC:

**Action Steps:**
- Upon congressional approval, finalize an agreement to serve as the coordinating entity.
- Using Federal funding, hire a Program Coordinator who will be responsible for promoting the project and securing matching funding from outside entities.
- Working with local and state governments, convention and visitors bureaus, tourism entities, and other stakeholders, create a Management Plan for the National Heritage Corridor within the three-year time table.
- Submit the completed Management Plan for National Park Service and Congressional approval.
Culture and Heritage Museums
Action Steps

Strategic Initiative VII – A: Maintain the quality of ongoing programs, special events, daily public activities, volunteer services, and facilities maintenance while continuing to seek ways to improve all activities through internal and external evaluation.

Overall Quality and Evaluation:

Action Steps:
Create and implement a stronger plan for gathering audience reaction to major programs, exhibits, events, and daily offerings.

Develop a plan for more formal evaluation of volunteer satisfaction and interests.

Improve internal formal annual planning and review of programmatic and volunteer elements that better incorporates audience response at each site.

Follow a cyclical maintenance and improvement plan for each Culture and Heritage Museums site.
Culture and Heritage Museums

Appendix B: Donor Bill of Rights

The Donor Bill of Rights

Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To ensure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the nonprofit organizations and causes they are asked to support, we declare that all donors have these rights:

I. To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.

II. To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.

III. To have access to the organization's most recent financial statements.

IV. To be assured their gifts will be used for the purposes for which they were given.

V. To receive appropriate acknowledgement and recognition.

VI. To be assured that information about their donation is handled with respect and with confidentiality to the extent provided by law.

VII. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.

VIII. To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.

IX. To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.

X. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

DEVELOPED BY:
Association of Fundraising Professionals (AFP)
Association for Healthcare Philanthropy (AHP)
Council for Advancement and Support of Education (CASE)
Giving Institute: Leading Consultants to Non-Profits

ORIGINALLY ENDORSED BY:
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National Catholic Development Conference (NCDC)
National Committee on Planned Giving (NCPG)
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