



SANTA BARBARA TRUST FOR HISTORIC PRESERVATION

Strategic Plan

2022 - 2024



STRATEGIC PLAN 2022 // 2024

The Santa Barbara Trust for Historic Preservation presents its 2022 – 2024 Strategic Plan. Building on the 2019 – 2021 Strategic Plan, the organization’s first, the new plan responds to the accomplishments of the last three years, as well as unforeseen conditions created by the pandemic which resulted in both new challenges and new opportunities. In general, the plan represents a renewed commitment to and reinvestment in the historic resources we manage and the programs that serve our community and visitors alike.

The plan was developed with robust input from the organization’s board and staff, and together we are proud to present our roadmap for the next three years.



GOAL 1 //

Create a vibrant sense of place and history through an improved visitor experience.

Objective 1

Develop an evaluation process for all aspects of the visitor experience.

- Create a plan for evaluation that includes both formative and summative evaluation strategies to guide development of all interpretive projects and programs to improve impact and demonstrate success to stakeholders. Develop an evaluation process for all aspects of the visitor experience.
- Conduct ongoing evaluation of all current public and school programs, and the everyday visitor experience.
- Identify, pilot, and use formative evaluation techniques to determine community needs and expectations.

Objective 2

Implement priority Visitor Experience Plan projects.

- Complete installation of El Presidio SHP sign program and repair existing signs.
- Complete Chapel Wedding Projection and related lesson plans.
- Proceed with development of new Presidio Visitor Center exhibits.
- Activate the visitor experience at Casa de la Guerra.

Objective 3

Host compelling, relevant content that supports the mission and values of the organization.

- Create and continue existing interpretive programs, exhibits, and experiences that demonstrate the multi-layered nature of the Presidio Neighborhood including the diverse histories of its people and the built environment.
- Evaluate ways to increase the number and diversity of onsite daily scheduled educational experiences.

- Establish new partnerships to bring relevant, mission- and value-based programming and activity to sites.
- Consider best medium (virtual, onsite, or both) when conducting program development to reach a wide audience.
- Prioritize the school-age audience by assessing changes in curriculum standards and creating student-centered, experiential programs.
- Strengthen connections between Presidio Research Center collections and program content.



GOAL 2 //

Elevate awareness of the value of Historic Preservation community-wide and promote the Presidio Neighborhood as a model.

Objective 1

Search for opportunities to extend SBTHP's reach community-wide in support of its mission.

- Participate in and advocate for historic preservation's role in projects that impact the future of our community.
- Host relevant programming that brings stakeholders together around big projects and issues in planning, economic development, inclusivity, and other mission-oriented topics using a historical and preservation lens.
- Use the organization's influence to draw attention to under-recognized community histories and preservation needs.

Objective 2

Improve the visibility of the Presidio Neighborhood and El Presidio SHP within the community and to visitors.

- Develop partnerships with community organizations to attract diverse constituencies to the Neighborhood.
- Coordinate Neighborhood efforts to support shared interests in marketing and special events through leadership of the Presidio Neighborhood brochure and app.
- Continue to draw more community-wide festivals and events to take place in the Neighborhood.

Objective 3

Elevate the role of Presidio Neighborhood businesses and tenants to amplify the historical interpretation of the neighborhood.

- Offer trainings and tours of the Presidio Neighborhood for business owners and employees.
- Support and encourage businesses to use images and historical information from the Presidio Research Center as part of marketing efforts.

- Incorporate tenants and businesses in existing interpretive programs and projects.
- Develop collaborative programs with businesses that highlight the Neighborhood's rich, multilayered history.



GOAL 3 //

Align organizational resources to most effectively achieve SBTHP's mission.

Objective 1

Undertake a brand evaluation and potential re-branding process.

- Secure an outside firm to develop a plan that builds on stakeholder values and expectations for the organization.
- Implement a plan to ensure consistent brand application in all internal and external materials, utilizing current technological opportunities and standards.
- Implement guest service guidelines and provide consistent training for all staff, interns, and volunteers.
- Evaluate additional ways social media can be used to create awareness and build community.
- Develop an ad-hoc committee to oversee this process.

Objective 2

Develop staff proficiency, morale, and synergy.

- Revisit employee performance review process to ensure emphasis on mission and strategic goals in performance evaluation criteria.
- Revisit and restart staff field trip and other professional development opportunities in light of the pandemic recovery.
- Explore opportunities for more cross-department teamwork and collaborations, on events, programs and projects.
- Prepare succession plans for key staff positions to ensure organizational continuity.

Objective 3

Augment existing staff resources with additional volunteer, intern, and student support.

- Create formal volunteer policies and procedures.

- Establish and develop a robust Affinity Group program that provides high-level engagement and support of current and future activities.
- Explore non-traditional sources for volunteers including school district and other organizational partnerships to attract diverse ages and backgrounds.
- Use the paid Higman Internships more consistently to support department activities and as learning opportunities for emerging professionals.

Objective 4

Build leadership and capacity of the organization's board of directors.

- Conduct board governance self-study through the Museum Trustee Association, Board Source, or organization of similar renown.
- Use Ad-Hoc Committees strategically to address short-term projects and strategic decision-making.

Objective 5

Evaluate the future role of SBTHP with the Santa Inés Mission Mills, develop a sustainable plan for the site.

- Hire outside consultation to conduct an assessment, including a cost benefit analysis of the site and park project to establish whether it is appropriate for SBTHP's ongoing management.
- Conduct meetings with key partners as part of the assessment, and to build awareness for the resource.
- Create an Ad-Hoc Committee of Mills Committee and Executive Committee members to conduct the above process.

Objective 6

Foster an organization-wide culture that supports fundraising and revenue generation.

- Continue to diversify revenue streams through facility rentals and fee-based products or services.
- Update donor acknowledgement opportunities and complete a donor acknowledgement area on site.
- Reinvest in SBTHP's retail shops, both online and physical, including more unique, branded products.
- Continue to grow membership base of SBTHP Advocates program with marketing support and attractive events.
- Cultivate rental clients to support restoration and maintenance of venues as donors.

Objective 7

Evaluate Institutional Finances to make sure funds best serve the mission.

- Board to direct consideration of the best use of unbudgeted and unspent cash funds and investment funds to invest in and accomplish SBTHP's objectives.
- Staff to continue research on SBTHP's various investment accounts, their history and purpose to inform SBTHP when making decisions about use of the funds and further investment.

Objective 8

Improve knowledge of and efficient access to SBTHP equipment, collections, supplies, and services, along with storage areas and uses.

- Create inventories of major types of collections, including institutional records, tools, capital equipment, and program supplies.
- Create designated spaces for event, program and maintenance storage.
- Create and maintain a schedule for appropriate disposal of outdated and broken equipment, and implement destruction and archiving tasks as described in Documents Retention Policy.
- Consider updating Documents Retention Policy with more detail and based on current organizational management.
- Evaluate vendor services for email, fundraising, retail, and utilities, and identify opportunities for integration, cost-cutting and increased efficiency.

GOAL 4 //

Prioritize care of and enhancements to the properties and historical resources for all types of site users.

Objective 1

Use maintenance plan and capital projects priority schedule as a key budgeting tool.

- Continue to keep the maintenance and capital project priority list active and forecasting 3-5 years into the future.
- Ensure receipt of updated maintenance schedule from Meridian (annually in March) as a tool for preparing the budget.

Objective 2

Be available for State Parks funding opportunities.

- Annually update El Presidio SHP projects on Project Infrastructure Database to be most competitive for State funding.
- Pursue grant funds related to propositions and bonds where applicable.

Objective 3

Consider capital and interpretive improvements that will support facility rentals as well as the visitor experience.

- Assess rental venues for maintenance and improvement needs, prioritize and attach to a timeline.
- Evaluate opportunities to add interpretive information as part of site rental experience.