

SANTA BARBARA  
TRUST FOR HISTORIC  
PRESERVATION



STRATEGIC PLAN  
2019 - 2021

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## STRATEGIC PLANNING PROCESS



The Santa Barbara Trust for Historic Preservation (SBTHP) is pleased to present our three-year strategic plan. This plan focuses our work with a shared vision and a clear path forward.

The planning process opened up the organization to input from internal and external stakeholders. Stakeholders are those the organization exists to serve, and any plan must begin with their voice. These stakeholders provided SBTHP with insight into how the organization could be a better partner and neighbor and how it could best contribute to a vibrant Santa Barbara. The planning process secured maximum engagement from the very people it serves: staff, board, and volunteers; donors; formal and informal partners; community leaders; tenants; and others. Over the course of four months, the organization hosted six community charrettes, listening sessions attended by a total of seventy-two internal and external stakeholders.

In addition to this effort focusing on the external dynamics of the organization, SBTHP senior staff and its Executive Committee conducted an analysis of the organization's strengths, weaknesses, opportunities, and threats and engaged in discussions focusing on internal operations. This included staffing, its board governance, finances, and budgeting processes, and fundraising. In preparation for designing the charrette questions, this team also examined the organization as a whole, determining what the organization is, who it serves, and how it does so. The Santa Barbara Trust for Historic Preservation is foremost the steward of its historical resources. However, the organization's work goes much deeper than this mandate. It is a community-focused and -based history organization in the heart of Santa Barbara. It sees its stewardship role as one of education, of preservation, of connection, and informal advocacy for history.



# MISSION AND VALUE STATEMENTS



## MISSION

Stakeholder responses and work by the SBTHP strategic planning team led to the articulation of a new mission statement for the organization:

The Santa Barbara Trust for Historic Preservation stewards the past and present of the Presidio Neighborhood and inspires preservation advocacy throughout the County in order to create a more vibrant community.

## VALUE STATEMENTS

Stakeholders expressed four core values for the organization. 1) Connection, 2) Welcome, 3) Education and History, and 4) Gathering. These principles inform the following Value Statements, which will underpin all of the organization's work.

The Santa Barbara Trust for Historic Preservation:

1. Preserves and stewards the historic resources entrusted in its care at the highest ethical standards.
2. Promotes the diversity of cultures that comprise(d) the Presidio Neighborhood.
3. Believes that the knowledge and practice of history is vital to sustain healthy individuals, communities, and the nation.
4. Provides a welcoming and accessible gathering place for Santa Barbarans and all who visit our community.
5. Activates the power of places of memory to engage the public with a deeper understanding of the past and inspire action to shape a better future.
6. Values and celebrates cooperation, partnership, equity, inclusivity, and diversity.

# GOALS

The Santa Barbara Trust for Historic Preservation will pursue four goals and associated objectives and tactics in the three years following adoption of this plan:

**GOAL 1:** Create a vibrant sense of place and history through an improved visitor experience.

**GOAL 2:** Demonstrate progress towards national standards in the history, museum, preservation, and nonprofit fields.

**GOAL 3:** Support the Presidio Neighborhood's growing role as a community hub.

**GOAL 4:** Align organizational resources to most effectively achieve SBTHP's mission.



# Goal 1

## **Objective 1: Develop an evaluation process for all aspects of the visitor experience.**

- Evaluate all current public and school programs.
- Create a plan for formative and summative evaluation to guide development of all interpretive projects and programs to improve impact and demonstrate success to stakeholders.
- Participate in national studies of audience and visitor research.
- Review school programs to ensure alignment with Content Standards of the California Department of Education.

## **Objective 2: Update interpretation at and restoration of historic sites to reflect current best practices and improve the visitor experience.**

- Complete installation of El Presidio SHP sign program and repair existing signs.
- Review the existing plans and create an updated 3-5 year implementation goals for 2010 Metaphor Visitor Experience Plan and 2012 El Presidio SHP Interpretation Master Plan, and building restoration projects.
- Proceed with Design Development phase of planning for Presidio Visitor Center exhibits.
- Activate the visitor experience at Casa de la Guerra.
- Strengthen connections between Presidio Research Center collections and program content.

## **Objective 3: Host compelling, relevant content that supports the mission and values of the organization.**

- Evaluate all institutional activities to ensure alignment with mission and institutional values.
- Develop and follow an inclusive process for working with target audiences to identify and evaluate relevant stories for inclusion into interpretive programs.
- 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.

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- 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.



Photo by Brittany Myles



Photo by Andrew Yew



## Goal 2

### **Objective 1: Benchmark organization's level of achievement of national standards.**

- Enroll in the American Association for State and Local History's Standards and Excellence Program for History Organizations.
- Develop a formal diversity and inclusion plan.
- Join the International Coalition for Sites of Conscience.

### **Objective 2: Commit to the professional development of the SBTHP staff.**

- Increase staff's exposure to a broader network of peers and related projects through attendance and presentations at state-wide and national conferences and service on committees of professional organizations and associations.
- Create annual professional development plan for staff and budget for its implementation as part of annual review process.
- Showcase the work of the SBTHP in the publications of the professional organizations to which the organization belongs.



Photo by Zach VanHarn



# Goal 3

## **Objective 1: 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.
- Advocate for the Neighborhood and its history in marketing and other efforts by the City, Visit Santa Barbara, Downtown Santa Barbara and other agencies.
- Participate in community-wide projects that address shared concerns of the Neighborhood including heritage and other tourism, land use and development, and the changing retail landscape.
- Coordinate Neighborhood efforts to support shared interests in marketing and special events.
- Incorporate the historical context of the Neighborhood into interpretive programming and projects to explore contemporary community concerns and issues such as housing, water, immigration, natural disasters, sense of place.

## **Objective 2: 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 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 4

## **Objective 1: Create a marketing/branding campaign for the Trust.**

- 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 training for all paid and unpaid staff.
- Develop formal communications plan to ensure excellence, consistency, and timeliness.

## **Objective 2: Develop staff proficiency, morale, and synergy.**

- Implement regular leadership meetings focusing on strategy, operations, and mission fulfillment.
- Maintain updated job descriptions for all staff and an updated organizational chart.
- Conduct formal annual employee performance reviews for all employees that emphasize mission in performance evaluation criteria, feedback, and job descriptions.
- Assess staffing strategies including staffing levels and reporting.
- Evaluate opportunities for internal cross-training for effectiveness and efficiency.
- Draft training/onboarding strategies for new employees.
- Update policies and procedures manual to reflect national standards and current operations.

## **Objective 3: Augment existing staff resources with development of a formal volunteer program.**

- Create formal volunteer policies and procedures.
- Continue to increase and diversify institution's volunteer base. Develop and establish a robust affinity group program that provides high-level engagement and support of current and future activities.

#### **Objective 4: Build leadership and capacity of the organization's board of directors.**

- Create board member emeritus committee for former members to continue to serve the organization in meaningful ways.
- Evaluate board committee structure and make recommendations for efficiency.
- Review and update bylaws to reflect current and best practices for organization governance.
- Conduct board governance self-study through the Museum Trustee Association, BoardSource, or organization of similar renown.
- Monitor and assess accountability for board attendance and giving expectations.

#### **Objective 5: Evaluate institutional finances.**

- Conduct cost/benefit analysis of all business operations.
- Evaluate and update organizational budgeting process for maximum efficiency and flexibility.
- Identify, prioritize needs, and budget for maintenance and restoration of historic properties under the care of SBTHP.
- Evaluate the future role of SBTHP with the Santa Inés Mission Mills, develop a sustainable plan for the site.

#### **Objective 6: Foster an organization-wide culture that supports fundraising and revenue generation.**

- Create an annual fundraising plan.
- Identify long-term fundraising needs and objectives.
- Create a culture of revenue generation that includes a focus on revenue as part of program planning and budgeting.
- Continue to diversify revenue streams through facility rentals and fee-based products or services.
- Evaluate and revise membership program, and create a value proposition for membership with stakeholder input. This includes examining *La Campana* and all other current membership benefits.
- Update donor acknowledgement opportunities and complete a donor acknowledgement area on site.

**Objective 7: Evaluate and enhance relationship with California State Parks and the State of California.**

- Annually update El Presidio SHP projects on Project Infrastructure Database to be most competitive for State funding.
- Send appropriate staff to training and partnership opportunities offered by the State.
- Identify opportunities to advocate for El Presidio SHP and the Mills at all levels of State Parks and local and statewide government.
- Increase resources for volunteer recruitment and program exposure through use of State Park social media platforms.



Photo by Dr. Paul Mori



Photo by Fritz Olenberger



# Santa Barbara Trust for Historic Preservation