



Santa Barbara Trust for Historic Preservation

Strategic Plan

2025 - 2027



The Santa Barbara Trust for Historic Preservation presents its 2025 – 2027 Strategic Plan.

This plan, the organization's third, reflects SBTHP's ongoing priorities to enhance the visitor experience and continue preservation work on the historic resources under our care. It includes a new emphasis on building public awareness and engaging in mutual support efforts with our partners in the Presidio Neighborhood. We acknowledge that we have created a plan during a time of increasing uncertainty, so we have also prioritized assessing our business model and existing resources with an eye towards strengthening our position for the years ahead. 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: Prioritize care of and enhancements to the physical plant and historical resources for all types of site users.

Objective One

Consider alternative uses for under-utilized SBTHP-managed properties with revenue potential when determining priorities for capital improvements.

- Assess properties for the opportunity to convert for housing and/or upgrade investments.
- Consider SBTHP's internal needs, including storage and office space when considering alternative uses.
- Prioritize opportunities and advance top priority projects.

Objective Two

Complete and enhance the sign program.

- Complete installation of El Presidio SHP sign program.
- Repair existing signs, including paint, QR codes, and rubbings.
- Create the intended sign passport with rubbings activity for park visitors.

Objective Three

Deferred maintenance.

- Maintain 3-5 year rolling maintenance schedule.
- Acknowledging that SBTHP's previous reconstructions and restorations are aging, complement the 3-5 year schedule with a 5-20 year, long-term maintenance schedule to help the organization plan ahead.

Objective Four

Ongoing maintenance.

- Devote appropriate resources for day to day maintenance considering increased uses of venues for markets and other large events.
- Create an annual maintenance work plan to ensure ongoing janitorial and landscaping tasks are complete along with larger maintenance and repair projects.
- Consider maintenance impact when planning new events and programs.
- Assess maintenance related tools and equipment and implement a storage plan to ensure organization and accessibility of these objects.



Goal 2: Elevate awareness of SBTHP and its work, including the Presidio Neighborhood as a destination.

Objective One

Coordinate Neighborhood efforts to support shared interests in marketing and special events through leadership of the Presidio Neighborhood marketing project.

- Complete a brand refresh for the Presidio Neighborhood.
- Create special events that support Presidio Neighborhood businesses.
- Create a Presidio Neighborhood membership program that provides marketing benefits to businesses and supports SBTHP's mission and operations.
- Create an annual marketing plan for the Presidio Neighborhood with staff resources to support.

Objective Two

Support Presidio Neighborhood businesses and tenants to amplify the historical interpretation and present-day vitality of the Neighborhood.

- Offer trainings and tours of the Presidio Neighborhood for business employees and other neighborhood stakeholders.
- Develop collaborative fee-based and free public programs with businesses that highlight the Neighborhood's rich, multilayered history and contemporary vibrancy.
- Facilitate Presidio Neighborhood businesses to cross-train in Neighborhood history and local business knowledge.

Objective Three

Undertake a brand implementation process for SBTHP.

- Determine a brand launch date and ensure consistent brand application in all internal and external materials.
- Leverage the brand implementation as a public relations opportunity for SBTHP.
- Mobilize the Casa de la Guerra mini brand to help build awareness and drive visitors to the museum (i.e social media, web and merchandise).

Objective Four

Consider prototyping, piloting, and microprojects to engage stakeholders while using resources efficiently.

- Consider mini-fundraising campaigns to support priority initiatives.
- Create “surprise and delight” opportunities to engage stakeholders using existing opportunities: i.e construction projects, behind the scenes, other operational highlights.
- Create small pop-up opportunities to try out ideas with neighborhood and other partners.

Objective Five

Enhanced marketing strategies.

- Support partners to bring relevant, mission- and value-based programming and activity to sites and amplify SBTHP’s reach.
- Translate marketing materials into multiple languages with a priority on Spanish.
- Prioritize wayfinding, maps, and other destination orientation tools when producing new marketing materials for SBTHP and the Presidio Neighborhood.
- Create marketing plans for SBTHP projects (including restoration and exhibits) that provide for multiple and sustained opportunities for connection.

Objective Six

Marketing and demographic research.

- Understand who is participating in our programs and events and who is not.
- Find sources of information about changing demographics that might affect our work, including school funding and enrollment, and cost of living.



Goal 3: Create a vibrant sense of place and history through an improved visitor experience.

Objective One

Develop a process for assessing and applying information from evaluations for all aspects of the visitor experience.

- Continue to conduct ongoing evaluation of all current public and school programs, and the visitor experience.
- Create tools for assessing the data collected.
- Create a plan for public programs, school programs and visitor experience data to be used to inform program planning, grants and fundraising, and marketing.
- Consider changing resources of the school system and its impact on SBTHP school programs when assessing annual programs.

Objective Two

Implement priority Visitor Experience Plan projects.

- Consider updated technologies, mobile, and QR codes when assessing VE Plan implementation.
- Create a plan for development of new Presidio Visitor Center exhibits.
- Complete the King Carlos Statue Exhibit.

Objective Three

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 multilayered 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.
- Prioritize scheduling school and public programs and exhibits at Casa de la Guerra to increase activity at the museum and incorporate partnership with The SPACE to amplify SBTHP resources.

The top of the page features a decorative header with three religious statues in ornate niches. The statues are of figures in dark robes, possibly saints or missionaries, set against a light background with architectural details.

Goal 4:

Align organizational resources during an uncertain time, and with necessary flexibility, to most effectively achieve SBTHP's mission

Objective One

Develop staff proficiency, morale, and synergy.

- Prioritize staff retention when considering organizational changes and budgeting.
- Prepare succession plans for key staff positions to ensure organizational continuity.
- Continue and enhance popular training, potluck, recognition and field trip programs for staff.

Objective Two

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

- Create formal volunteer policies and procedures including recruitment, training, vetting, administration and recognition.
- Develop a robust Affinity Group program that provides high-level engagement and support of current and future activities building on the work of the AAAG and PNAC.
- Explore non-traditional sources for volunteers including school districts, Santa Barbara City College, Housing Authority of the City of Santa Barbara and other organizational partnerships to attract diverse ages and backgrounds.

Objective Three

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.
- Assist the board in becoming strong ambassadors for the organization with educational opportunities on various aspects of SBTHP's work (including restoration, programs, membership, and volunteerism).

Objective Four

Create a sustainable plan for the Santa Inés Mission Mills that does not rely on SBTHP's financial support.

- Identify partnerships to share the management of the property and serve as a potential park operator.
- Work with California State Parks to create an exit plan for the leaseback agreement.
- Relieve the debt burden of the property on SBTHP.

Objective Five

Native American involvement.

- Work with State Parks to understand the new consultation process, and how and when to undertake it.
- Continue to nurture partnership with The SPACE to support more Native American use of SBTHP-managed properties.
- Create an organizational Land Acknowledgment.

Objective Six

Enhance existing and identify new revenue streams, both short term and long term to support SBTHP's mission.

- Continue to grow membership base of SBTHP Advocates program with marketing support and attractive events.
- Create a stewardship path to convert facility rental clients, visitors, and program and event attendees into members, donors and supporters.
- Continue consideration of the best use of unbudgeted and unspent cash funds and investment funds to invest in and accomplish SBTHP's objectives.
- Conduct an annual evaluation of facility rental rates and services to ensure competitive rates that cover SBTHP expenses and generate revenue.
- Complete a donor acknowledgment area at El Presidio SHP to leverage the benefits of giving.

Objective Seven

Prepare for the De La Guerra Plaza revitalization.

- Create a plan for impact on Casa de la Guerra of the Plaza project, including additional revenue, expenses, marketing, facility rentals.
- Consider ways that programming in the Casa courtyard can complement programming opportunities in the Plaza.
- Work with the City and other partners including DSBIA to consider ways that SBTHP can support interpretation of the Plaza.

Objective Eight

Assess SBTHP's operating model to ensure a sustainable future.

- Continue the fund evaluation process to support the financial sustainability of all areas of SBTHP's budget.
- Consider a fundraising assessment of the organization, including capacity for a planned giving program.