



## PRESERVATION GREENSBORO INCORPORATED STRATEGIC PLAN 2015–2020

Version 1 updated August 2015

### VISION

A vibrant and dynamic community has passion for its history and architecture.

### MISSION

Preservation Greensboro saves our community's historic and architectural treasures

### WHAT WE DO

Our project portfolio includes Architectural Salvage, Blandwood historic house museum, the Blandwood Carriage House special events center, a library, the annual Tour of Historic Homes, and community advocacy. We promote architecture and neighborhoods through our activities such as educational tours, online publications, special events, seminars, and publications, while our sister organization the Preservation Greensboro Development Fund finds extended uses for historic buildings owned by others through partnerships and creative solutions.

### CONTEXT

- We are the only non-governmental advocate for historic preservation and

adaptive reuse in Greensboro.

- Blandwood, our National Historic Landmark property receives no state or national funding. The organization took ownership of the property in 2011, and visitorship is increasing, but the campus requires a great deal of investment in the form of stewardship and modernization.
- The work of the Development Fund is at the core of our mission, and its success is crucial as a tool for historic preservation.
- Our constituency depends on our expertise to lead preservation efforts among community leaders. PGI is the go-to resource in Greensboro.
- Architectural Salvage is well-managed by volunteers and staff, and continued sustainability is crucial.
- The Morehead Forum was inaugurated in 2012, and has worked to raise the profile of Blandwood within North Carolina leadership.
- PGI must be wholly sustainable in terms of income. Though membership, rentals,

proceeds from ASG and our endowment contribute to positive cash flow, additional corporate and major gift support is crucial.

- Membership revenue is recognized as a valuable way to build community support and stabilize finances. Though PGI's membership is below our peer groups, events and activities can help boost community interest in supporting the organization and its mission.
- The Blandwood Carriage House is a rental venue that can be used more to help raise the profile of the organization in the community and stabilize finances.
- Our strengths lie in the history of our organization, the high profile of the Morehead name in our state, and the geographic, ethnic, and economic diversity of our constituents across the county.

## VALUES AND BEHAVIORS

**Integrity** We maintain transparency within the community, recognize opportunities for improvement, and learn from our mistakes. We do what is best for PGI and our community, and we work within the community with consistency and with fairness.

**Passion** We care about PGI and our mission and promote the preservation movement across Guilford County and beyond.

**Accountability** We take personal responsibility and ownership of problems and act conscientiously. We respond to the needs of our constituents and others.

**Teamwork** We trust and respect each other; we listen, and are fair, constructive and supportive. We actively contribute to improving the way we do business and value the contributions of others.

**Fun** Historic preservation is an intriguing and interesting topic that blends history and community with many professional fields. We are passionate about our work, but we remember to have fun on the journey.

## CORE ACTIVITIES

Our structure is built around the five areas in which we work:

**Architectural Salvage** – founded in 1993, the initiative works to recycle and reuse vintage building materials. The leadership team for ASG is in the form of its oversight committee that organizes salvages, maintains the ASG showroom on Huffman Street, and works with PGI staff to provide oversight on finances, marketing, and planning issues.

**Blandwood Campus** – as Greensboro's only National Historic Landmark structure, the campus hosts a variety of uses including the flagship house museum and ancillary uses such as the gardens, the Blandwood Museum Shop, and the Blandwood Carriage House. All of these functions must work together to foster a welcoming and engaging visitor experience, and to take a long term approach in the stewardship of the property for the future.

**Promotion and Awareness** – the work done in this area falls into several activities that range from the Morehead Forum for Economic Development, our annual Tour of Historic Homes & Gardens, Love-A-Landmark fundraising parties, our website, and e-newsletter *Landmarks Online*. We need to continuously advocate for historic preservation in order for the issue to remain relevant in our community, and educate our constituency on standard and emerging themes in the field such as diversity, sustainability and mid-century modernism.

**Operations** – the core services and functions that support our staff, volunteers, and activities and help us to meet our financial obligations and standards such as audits, licenses, permits, and bookkeeping.

### **Preservation Greensboro Development Fund**

– founded in 1988, this Redevelopment (Revolving) Fund is a critical tool in saving treasured places. It serves as a think tank for preserving structures that cannot be saved through the private sector, and it accomplishes this task through a variety of legal interests, partnerships, and outside-the-box thinking.

## **AIMS AND OBJECTIVES**

### **1 Involvement**

A wider range of people are involved in understanding, interpreting and caring for historic preservation. We aim to:

- 1.1 better manage partnerships with cultural institutions, community groups, and other organizations
- 1.2 embrace life-long learning among a full representation of our community
- 1.3 strengthen our community involvement through special events
- 1.4 engage with our membership and supporters. "Friend"raise.
- 1.5 encourage and show appreciation for our volunteers
- 1.6 explore more opportunities for people to make an active connection to what we do.

### **2 Access and Enjoyment**

We present our mission to a wide range of people through our museum, rental venues, events, and programs. We aim to:

- 2.1 determine more effective ways for people to enjoy our museum, rental venues, events, and programs
- 2.2 use digital and other media to engage people with our museum, rental venues, events, and programs.

- 2.3 ensure that all visitors feel welcome and experience something special each time they visit a one of our locations
- 2.4 improve access to our museum, rental venues, events, and programs for people with disabilities
- 2.5 learn more about our audiences.

### **3 Curatorship of Blandwood**

Our properties and collections are handed on to future generations in good condition. We aim to:

- 3.1 put careful research at the heart of all our work
- 3.2 make better use of curatorial policy
- 3.3 make decisions that are transparent and for which we are accountable
- 3.4 meet local landmark designation and preservation easement requirements
- 3.5 maintain our properties and collections well
- 3.6 increase the visibility of the conservation process.

### **4 Sustainability**

PGI becomes a more stable organization with a secure future. We aim to:

- 4.1 improve awareness of PGI and its programs
- 4.2 better understand the economic, social and environmental impacts our mission
- 4.3 invest in and develop our sustainability components
- 4.4 increase earned revenue
- 4.5 control expenses and improve financial management
- 4.6 foster relationships with Government and sponsorship partners
- 4.7 monitor and evaluate our effectiveness.

### **5 Staff Conduct and Growth**

The well-being and specialized knowledge of our staff improves. We aim to:

- 5.1 develop a better sense of shared mission across all programs of PGI
- 5.2 develop and cultivate the skills of staff

- 5.3 adhere to our PGI Staff Handbook adopted August 2011
- 5.4 conduct staff evaluations annually
- 5.5 develop a team-based work culture
- 5.6 promote the value of good preservation standards
- 5.7 keep our creative edge
- 5.8 encourage more people to discover their own story.

- 6.1 compose a board that believes that a vibrant and dynamic community has passion for its history and architecture.
- 6.2 maintain a board that represents our community in terms of geography, ethnic, gender, and age
- 6.3 adhere to the bylaws and constitution that has been approved by the full membership
- 6.4 assure that board members serve as public ambassadors for historic preservation throughout of community

## 6 Board of Directors

The success of the organization will rely on a healthy board for community partnerships. We aim to:

## 2015 STRATEGIC DIRECTIONS

1. Conservation of Blandwood
  - 1.1 Interior and Exterior Projects to maintain the historically significant features of the building
  - 1.2 Build a Capital Reserve for future preservation and restoration
  - 1.3 Conserve prioritized items in the collection
2. Preserving Key Buildings in the Community
  - 2.1 Provide Technical Assistance Consulting and Educational programs on historical preservation of appropriate buildings. Develop a Program Plan that addresses sustainability of these efforts.
  - 2.2 Through the Revolving Fund, feature a key community project for reinvestment
3. Strengthening Preservation Efforts for the Future
  - 3.1 Increase community understanding of the benefits of preservation.
    - Develop a Program plan for education programs.
      - Implement new and continuing educational programs. Examples include: Research on House history; Consulting on Preservation; History and Preservation
    - Build partnerships to increase community use of the Blandwood campus and to progress goals in preservation
    - Update communications plan
  - 3.2 Create an Operating Reserve for Preservation Greensboro functions

## ACTION STEPS

1. Near Term (1 year)
  - a. Secure funding to paint Blandwood using donated paint.
  - b. Explore options for increased income from the Carriage House.
  - c. Institute recommendations for governance and committee structure
2. Prepare for a Capital Campaign
  - d. Assess capital needs of Blandwood
    - i. Determine budget for addressing the needs.
    - ii. Set priorities for these improvements.
  - e. Outline Program Ideas to Explore
    - i. Develop plan for program growth
      1. Preservation of Buildings
      2. Education about History and Relevance of Preservation
      3. Communications
    - ii. Determine if plan is funded internally through a campaign, or developed externally from a campaign.
  - f. Calculated Needed Amount for a Capital Reserve for Blandwood
    - i. Develop a 5 year financial plan, taking into account the information above and program needs.
3. Identify or Hire Campaign Leadership and Conduct Capital Campaign

## *Notes from May 2015 Board Meeting*

### Short Term Activities (prior to a Capital Campaign)

Research: the cost of maintenance of Blandwood property

Look at history of costs and current budget as part of calculating a desired capital reserve (or endowment)

Paint (100-150k), repairs to garden and repair of well house, fence, cupola, south porch (in process)

Adjust composition of Executive Committee, and review mission and governance of other committees

Assess exterior needs

Restoring interior needs such as mechanicals and finishes – assess

Explore expanded use and future needs of Carriage House

“Consulting on Preservation” – develop fundraising or friend-raising program (later?)

Development Fund – capital funds are not critical now. Would be glad to feature a project to aid in capital campaign.

### Part of a Capital Campaign

Capital reserve (clarify reserve or endowment)

Exterior appearance (landscape plan, new sidewalks, lighting, peripheral definition, and signage)

Preservation of systems (plumbing, electric, HVAC, insulation)

Restoring interior features (finishes, plaster, wallpaper?)

Collection – restoration of some items (portraits, new sofas, candelabra, horsehair, upholstery)

Research on historic sites history (Exec. Director)

Program Development including sustainability

-Promoting preservation county-wide

-Education on importance of preservation, architecture, history

Operating reserve of one year

Truck for Architectural Salvage, \$60k, would allow geographic presence of ASG