

STRATEGIC PLAN

2019 - 2024

Historic Fredericksburg Foundation, Inc.

1200 Caroline Street
Fredericksburg, VA 22401

(540) 371-4504
office@hffi.org



HISTORIC
Fredericksburg
FOUNDATION, INC.

HFFI Strategic Plan

Table of Contents

Executive Summary	.....	3
Mission Statement	.....	3
Vision Statement	.....	3-4
Values Statement	.....	4
Defining Preservation	.....	4
SWOT Analysis	.....	5
Five Strategic Goals	.....	6-15
Measuring Performance and Evaluation	.....	16
Conclusion	.....	16
Attachments	.....	17

HFFI Strategic Plan 2019 – 2024 compiled by Sandra Erickson, Director of Operations.

Approved by the HFFI Board of Directors April 2019.

Shared with HFFI Membership March 2019.

Content based on Board of Directors and Staff planning session in August 2018 and following Board Meetings.

HFFI Strategic Plan

Executive Summary

The Historic Fredericksburg Foundation, Inc. (HFFI) is a member and volunteer supported 501c(3) nonprofit organization founded in 1955 by a group of local citizens alarmed by the destruction of several architectural and historical landmarks in the city. In the past, we saved buildings we believed needed to be preserved. We were relevant for the time and the needs of the community.

Currently, we are trying to find our way again. We are redefining our role in preservation, protection, and advocacy as an organization. We also have the current challenge of our office space, the historic Lewis Store, not being fully open and usable. However, HFFI continues to host many great events to educate and engage the community. We have a base of volunteers and membership that engage with us on a regular basis.

In the future, we strive to have a heavier focus on advocacy. Along with engaging the community in the plethora of diverse historic preservation and protection issues, we strive to be relevant and hold clout. In order to do so, the HFFI Board of Directors and Director of Operations met in August 2018 to discuss current HFFI operations and the vision for the future. This document outlines those discussions, and will push us forward for the next 5 years.

Mission Statement

The mission of the Historic Fredericksburg Foundation, Inc. is to preserve, protect, and revitalize the distinctive historic environment and cultural resources of the Fredericksburg area.

Vision Statement

The vision is to meet these guiding principles:

- To protect the Fredericksburg area's rich cultural and historical heritage.
- To promote awareness of, and interest in, local preservation issues.
- To inform future generations of the benefits of preservation to our quality of life.

We promote awareness and interest in local preservation issues and inform future generations of the benefits of preservation. We do lots of fun, friendly, social activities. Unfortunately, we do not do a very good job of actually protecting our historic downtown.

It seems every few years a historic building succumbs to some form of demolition by neglect. In the last few years we have lost a 1700s house on Caroline Street and the Sophia Street house that appears in Civil War photos. The safeguarding of these houses is our collective responsibility. We are sick and tired of losing our historic infrastructure. Not every old house can or should be saved, but we need to be able to rally our forces for those we deem important to save. That process takes time, and we need to selectively pick and choose our battles.

The Code of Virginia gives clues of what might be done: "Historic building demolition may be prevented by authority granted to local historic review boards in accordance with § 15.2-2306." For Fredericksburg, that is the Architectural Review Board (ARB). Luckily, the ARB's guidelines are currently under review. The code goes on to say: "The governing body shall provide by ordinance for appeals to the circuit court... and shall specify therein the parties entitled to appeal the decisions..." The goal is to have HFFI to be specifically named by City ordinance to have the right of standing and the ability to appeal any decision to raze, demolish, or move any structure in Fredericksburg's historic district.

HFFI Strategic Plan

HFFI has established itself as the watchdog for historic properties downtown. The City of Fredericksburg unfortunately has not stopped these demolitions by neglect. We collectively could do so much more to protect our historic downtown if HFFI were given the right of appeal. Unfortunately, there always seems to be an old structure in town in danger of being torn down. The goal is to have an ARB review and appeal process that works to limit these needless demolitions. Demolition by neglect needs to cease. HFFI helps to keep a spotlight on these concerns. We want to find a way to build consensus on this issue in order to serve HFFI and our community.

Values Statement

- Relevant
- Resource
- Advocate
- Involved
- Leader
- Teacher

Defining Preservation

Historic preservation demonstrates that we have a passion for the past that acts as a foundation for the future. At HFFI, historic preservation focuses on the built environment as outlined:

- Historic sites (historic properties and buildings)
- Physical preservation and protection (includes stabilization, rehabilitation, and restoration)
- Documentation (includes written, photographic, and oral history)

HFFI supports and recognizes that the historic district is a living, breathing entity that needs new energy, vigor, and innovation. As these changes occur regularly in the city, HFFI strives to preserve historic context and the integrity of its architectural heritage. Whether it is educating or advocating in these areas, HFFI wants to influence historic preservation in Fredericksburg.



408 Hanover Street from the 48th Annual Candlelight Tour

SWOT Analysis**Strengths**

- Dedicated Board, Staff, and Volunteers
- Longevity
- Financially Stable
- Well-known in the community
- Board involvement in events, preservation projects, member engagement, advocacy, media, fundraising, research, easements, volunteer engagement, and outreach.
- Communication and outreach through publications
- Special Events
- Marker Program
- Our history as an organization is compelling and noteworthy

Weaknesses

- Not enough people with specific expertise in preservation
- Unbalanced Board engagement (some spend more time / resources than others)
- Major tasks that the HFFI Board is not involved in (such as resource center management)
- Lack of funds for full-time preservationist

Opportunities

- Clarifying our future as a Board and Board-building
- Involvement with ARB/City Council - Majority of the Board agrees that HFFI can advocate and publically challenge (approach is important)
- Increase communication about preservation benefits and challenges; grow more preservationists
- Appreciation of people who do preservation right
- Host/Sponsor Preservation Speaker Series and Historic Homeowner education programming
- Member appreciation and recruitment
- Hire a Preservationist
- Enforcement of easements
- Recruitment of volunteers with website knowledge or interest in building digital resources
- Lewis Store (opportunity in multiple ways)
- Fundraising
- Stop demo by neglect

Threats

- Financial stability needs to be on the forefront for future goals
- Other groups hosting events with a community preservation bent and not involving HFFI
- Need a defined SOP process for advocacy
- Decline in community status
- City's pressure to resolve most all preservation conflicts in the community
- People are not always supportive

HFFI Strategic Plan

Five Strategic Goals

<u>GOAL</u> To increase preservation awareness through Education .			
<u>Objectives</u>	<u>Strategies</u>	<u>Priority Measures</u>	<u>Evaluation</u>
Promote the Lewis Store as a user-friendly resource center.	<ul style="list-style-type: none"> • Partner with CRHC and Virginiana Room to make signage or increase communication about one another's resources. • Signage inside and outside Lewis Store indicating we have a resource center. • Post resources online (Facebook posts, blogs, newsletter, website). • Post a video tour of the research center online. • Get HFFI credit for sources. • Create document for signature to count what resources used, by when, and for what purpose. 	At least two signs (one inside and one outside) indicate that the Lewis Store has a resource center.	Record how many people use the Resource Center each year to look for upward trends in usage.
Educate the community on the layers of history and what it represents in our community.	<ul style="list-style-type: none"> • Incorporate layers of public history and how the physical building is historically important in Candlelight Tour scripts or book summary information, event scripts, and other lectures. • Share layers of history in social media and publications, such as Facebook, Marker Reports, HFFI Journal articles, and so on. 	Number of years HFFI educates people on to give a comprehensive history.	Host quizzes online or in the HFFI newsletters related to information given by HFFI.

Educate people on how to care for their historic building in keeping with best practices of preservation.	<ul style="list-style-type: none"> • Education Committee hosts at least one educational lecture by a professional on technical preservation. • Make resources available on the hffi.org website and promote them. • Post at least one article or tip for homeowners on Facebook page weekly. • Post at least one article a month on Facebook about the benefits of preservation policy (boost to economic / environment / re-sale / cultural value) • Post at least two blogs a year on how to care for a particular component of a historic building and feature case studies on various projects. • Educate the community on living in an historic space in the modern world. (Focus on the interior as well as the exterior.) 	<ul style="list-style-type: none"> • Number of lectures on preservation. • Number of articles or tips shared through social media. 	<ul style="list-style-type: none"> • Host quizzes online or in the HFFI newsletters related to tips given by HFFI. • Track number of hits to webpages. • Count attendees.
Host events (lectures, tours) to educate the community.	<ul style="list-style-type: none"> • Include a “preserve, protect, or revitalize” element to each event hosted by HFFI. • Host a mix of events to appeal to a broad audience. • Events Committee meets once a month. • Invite influential people in town. • Partner with other organizations. 	<ul style="list-style-type: none"> • Number of new members. • Number of events each year (at least six). • Number of people in attendance. 	<ul style="list-style-type: none"> • Host quizzes online or in the HFFI newsletters related to facts given at events. • Number of people who return to HFFI for information.
Promote the Marker Report program and share researched information.	<ul style="list-style-type: none"> • Develop a page on the HFFI website to share this information and promote it. • Post summaries of Marker Reports on the HFFI Facebook page and Blog. • Keep the Lewis Store open to the public and allow copies of the Marker Reports to be made by members. 	<ul style="list-style-type: none"> • Number of visits to HFFI Marker page. • Number of people reached on social media and the website. • Number of people who use HFFI resource files. 	Add total number of reaches for marker information on a yearly basis to show increase in access.

HFFI Strategic Plan

GOAL To stabilize the Lewis Store building and establish it as a resource to the community.			
<u>Objectives</u>	<u>Strategies</u>	<u>Priority Measures</u>	<u>Evaluation</u>
Make the Lewis Store a user-friendly resource center.	<ul style="list-style-type: none"> Keep clutter down in the resource center by organizing and filing documents. Review files to ensure content is relevant and organized. Scan paper files into the Shared Drive. 	One intern each semester and one HFFI volunteer consistently assigned to organizing, filing, and reviewing documents.	Record how many people use the Resource Center each year in order to look for upward trends in usage.
Host events at the Lewis Store (ex/ open house, lectures, small gatherings)	<ul style="list-style-type: none"> Have supplies available to host these events (chairs, projector, etc.) Advertise the space as available for use with suggested donation. 	Six events a year hosted at the Lewis Store, hosted by HFFI or others.	Compile feedback or exit survey results from guests or hosts.
Fix the summer beam and sagging ceiling situation.	<ul style="list-style-type: none"> Put out a request for bid. Seek grants and funding sources for the repairs (see more in financial.) Send out press releases and information to membership about the repair to increase community awareness. Research options for future location of HFFI and preservation-minded potential stewards for the Lewis Store. 	<ul style="list-style-type: none"> Lewis Store no longer under construction; all temporary supports removed and ceiling is sealed on first floor. Number of members or community members financially supporting the project. 	Structural engineer looks at the building 6 months and one year after repairs are complete to ensure the building is stable.
Address moisture problems in the basement.	<ul style="list-style-type: none"> Install french drain at rear property line. Install a professional dehumidifier in the basement. 	<ul style="list-style-type: none"> One french drain installed. One professional dehumidifier installed. 	Checking see that there is decreased moisture in the basement after each step.

HFFI Strategic Plan

Fix the radon issue.	<ul style="list-style-type: none"> • Measure the amount of radon in the building with a radon detector. • Hire a contractor to present a sensitive and effective solution. 	Decrease in radon reading after actions are taken.	Keep radon detector in the basement to consistently test for radon for up to a year.
Maintain a clean, fresh appearance of the Lewis Store.	<ul style="list-style-type: none"> • HFFI sign underneath the Lewis Store sign. • Volunteer cleans once every other month. • HFFI Staff spends at least 10% of their time each week organizing or tidying the Lewis Store. • Host a Spring Cleanup each year with volunteers. • Volunteers at the front desk maintain the cleanliness of the office space, front room entry, and signage. 	Take before and after photos.	Prior to every Spring Cleanup, make a list of what needs to be done; after every Spring Cleanup, make a list of what was completed.
General maintenance of the building.	<ul style="list-style-type: none"> • Include general maintenance in the yearly HFFI budget. • Designated person (Volunteer, Board Member, or Staff Member) does a walkthrough of the building yearly to make a list of what needs to be fixed and prioritize according to safety, financial necessity, functionality, or visibility. 	<ul style="list-style-type: none"> • Clean gutters twice a year. • Complete general maintenance projects as needed. • Maintain a minor repair list. 	Record completed projects in the Lewis Store repair spreadsheet upon completion.
Turn the front room into a rotating exhibit, gift shop, and recreation of the store from the 18 th century.	<ul style="list-style-type: none"> • Include a Lewis Store recreation line item in the budget. • Create a committee dedicated to designing the space, seeking donations, and raising funds. • Advertise and promote the new look. 	<ul style="list-style-type: none"> • Number of visitors entering the store prior to and after store creation. • Income in sales prior to and after store creation. 	Increase foot traffic and sales by 25%.

HFFI Strategic Plan

GOAL Financially grow the organization so it can support programming and more staff.			
Set aside funds for legal support.	Establish a line item in the budget for legal support.	Amount of money available for legal support.	Report on money spent and outcomes.
To maintain financial stability. (define what this means)	Appoint a Financial Resources Committee.	Provide recommendations by the 2020 annual meeting.	Review financial reports monthly and annually, give yearly recommendations to Board and Staff.
To hire a full-time preservationist.	<ul style="list-style-type: none"> Investment accounts provide income for HFFI to be used for a preservationist position. Develop a job description. Hire a part-time preservationist with the goal of it becoming a full-time position within the next 5 years. 	Earn 20K from investment accounts per year.	<ul style="list-style-type: none"> Hire a part-time preservationist by the end of 2020. Have a full-time preservationist by the end of 2023.
Establish a revolving fund for small repairs property purchases (fix and resell), and assist people with tax credit projects.	<ul style="list-style-type: none"> Establish a fund to receive donations and other capital which is used to purchase endangered property which is then resold with easements. Make loans for building renovations, which then replenish the revolving funds as those loans are repaid. Include Revolving Fund in literature about specific donations people can make. 	Increase amount of revolving funds available each year for the next five years.	Report on recipients of revolving fund each year at the annual meeting.
To increase bequests and lifetime memberships.	<ul style="list-style-type: none"> Board Members and Staff conduct outreach to HFFI members they personally know who have been members for more than 5 years. Develop literature specifically promoting these opportunities. Include information in the Candlelight Tour book, website, and social media. 	<ul style="list-style-type: none"> By 2020 annual meeting, each Board Member and Staff member conducts outreach to at least one member. By the 2021 annual meeting, HFFI has two more lifetime members. 	<ul style="list-style-type: none"> At the end of 5 years, HFFI is given \$25,000 in lifetime memberships or bequests. Analyze member numbers.

HFFI Strategic Plan

To increase local business relationships.	<ul style="list-style-type: none"> • Update Corporate-level membership brochure and literature. • Board Members and Staff conduct outreach to businesses they have relationships with. • Highlight current local business relationships on social media, the website, and newsletter. • Host a thank you event for corporate sponsors at the Lewis Store. • Secure local business sponsorships for each HFFI hosted event. • Send thank you notes. 	<ul style="list-style-type: none"> • \$500 in sponsorships for each HFFI hosted event. • \$10,000 in advertising/sponsorships for Candlelight Tour. • Increase Corporate-level memberships each year for the next five years. 	Report on local business support at each annual meeting.
To have funds available for volunteer and membership expenses.	<ul style="list-style-type: none"> • Designate one event per year to raising funds for volunteer and membership expenses. • Make line items in the budget for volunteer and membership expenses. 	Percent of budget for volunteer and membership expenses.	Annual increase in funds available for volunteer and membership expenses.
To sell our merchandise. (Shirts, books, ornaments, notecards, journals, etc.)	<ul style="list-style-type: none"> • Create deals online to entice customers, correspond with special events, holidays, or community happenings. • Highlight merchandise on #weeklydealwednesday • Highlight merchandise in each HFFI newsletter. • Make displays in-store attractive. • Feature a piece of merchandise (on sale) with each HFFI hosted event. • Create small items to be sold with the HFFI brand. • Reevaluate local stores who sell HFFI merchandise. Reach out to expand who we sell to and ensure current sellers are fully stocked. 	Increase percent of merchandise income by 50% in the next 5 years.	Record income from merchandise in 2018, and report on merchandise sales at the end of each fiscal year at the annual meeting.

HFFI Strategic Plan

To increase percentage of funds over the next 5 years.	<ul style="list-style-type: none"> • Cut costs in office administration expenses. • Keep special event expenses to 30% or less of the projected income. • Investment accounts provide income for HFFI to be used for a preservationist position. • Execute the aforementioned objectives aimed at earning more income. 	Increase net income by 25% over the next 5 years.	Record net income in 2018, and report on net income every year at the annual meeting.
--	--	---	---

<u>GOAL</u> Use our easement program as a tool to protect and preserve historic Fredericksburg.			
<u>Objectives</u>	<u>Strategies</u>	<u>Priority Measures</u>	<u>Evaluation</u>
To hire a preservationist.	<ul style="list-style-type: none"> • Hire a preservationist familiar with easements, and local and national standards. • Work with the Real Estate Committee to uphold easements, maintain records, and conduct outreach. • Partner with the city, ARB, and other community partners by attending meetings, having open communication, and being involved in decisions involving historic properties. 	Hire a preservationist, with someone in the position full-time in the next five years.	Keep a log of easements addressed over a five year period and report on quantifiable information at each annual meeting.
To prioritize easements.	Real Estate Committee makes a priority list based of properties based on a certain threshold.	Number of properties addressed according to priority list.	All easement property owners contacted at least once over a five year period with a report.

HFFI Strategic Plan

To have funds set aside for any legal matters.	(SEE GOAL RELATED TO FINANCIAL GROWTH)		
To increase the interest in easements.	<ul style="list-style-type: none"> • Market the benefits of easements to the local community. • Publicize success stories from HFFI easements (blog, website, newspaper, social media) • Share success stories from other communities. • Make a blog article and article in newsletter listing the benefits and common misconceptions. 	<ul style="list-style-type: none"> • Implement one of the aforementioned strategies at least once a month. • Number of newsletter views/clicks. 	Increase in easement inquiries and easements over the next five years.
To showcase “standing” surrounding easements.	<ul style="list-style-type: none"> • Work with the city to update the 2012 Memorandum of Understanding to focus more on standing. • Use standing to influence property owners. • Publicize the meaning of “standing” and how it helps the city. 	Influence at least one project by claiming standing in a case that comes up to the ARB or city.	Record influence on “standing” and use it in future cases.
To promote the percentage of historic downtown that we influence.	<ul style="list-style-type: none"> • Create a map showcasing easements in one color and “standing” in another color. • Publish an article about percentage in Front Porch article, and other publications as determined. • Share information with membership at annual meeting. 	<ul style="list-style-type: none"> • Map created and publically shared showing influence. • Number of likes on Facebook. 	Influence shared at least once a year.
To consistently monitor our current easements.	<ul style="list-style-type: none"> • Maintain a strong membership in the Real Estate Committee to monitor easements. • Keep a spreadsheet that tracks when easements have been reviewed. • Create easement newsletter. 	<ul style="list-style-type: none"> • Percent of easements reviewed. • Number of properties improved through easements. 	Report on monitoring done by Real Estate Committee at each Annual Meeting.

HFFI Strategic Plan

GOAL Recognize threats to the historic district, and be respected and effective advocates of preservation and protection.			
<u>Objectives</u>	<u>Strategies</u>	<u>Priority Measures</u>	<u>Evaluation</u>
Keep existing buildings in historic Fredericksburg.	Develop an escalation of force SOP to use every time we have to enforce preservation and protection.	<ul style="list-style-type: none"> • Development and approval of SOP by the Board. • Percentage of properties saved. 	Update SOP as needed after implementation.
Prepare the Board to advocate on behalf of HFFI at Architectural Review Board Meetings.	Set HFFI guidelines on our ARB review process in general terms.	Number of times a Board Member spoke on behalf of HFFI.	Update guidelines after implementation as needed.
HFFI be named by City ordinance to have the right of standing and the ability to appeal any decision to raze, demolish or move any structure in Fredericksburg.	<ul style="list-style-type: none"> • Ask politely, then if necessary, demand that HFFI be named by City ordinance. • Make public through publications. • Organize a Ways and Means Committee to push the above goal forward. • Set up a meeting with the City. • Appoint/Specify Legal Counsel. 	Receive something in writing indicating right of standing by the end of 2020.	Meet with the city once a year regarding this ordinance.
To increase membership participation in advocacy.	<ul style="list-style-type: none"> • Pick a righteous issue to fight for all the way. • Members sign up to attend ARB meetings. • Create a poll online to gather people's thoughts on certain topics. • Prepare petitions online, through texting, or letters of supports. 	20% of membership participate in an advocacy issue.	Create sign-up opportunities to attend or provide feedback for ARB meetings, and measure attendance and participation through feedback.

HFFI Strategic Plan

<p>To promote HFFI successes.</p>	<ul style="list-style-type: none"> • Highlight buildings HFFI has saved. • Pull history from library and HFFI files to share stories of HFFI successes in the past. • Celebrate people who did the work by public mentions. 	<ul style="list-style-type: none"> • HFFI newsletter includes one success per issue. • HFFI blog and Front Porch article highlights at least one past success per year. • HFFI Facebook page highlights one past success every week. 	<p>Poll membership at the beginning and end of the implementation of the strategic plan to see if their feelings about HFFI have become more positive.</p>
-----------------------------------	--	---	--



Historic Fredericksburg Foundation, Inc. Annual Meeting at the Renwick Courthouse on Princess Anne Street.

HFFI Strategic Plan

Measuring Performance and Evaluation

Actions, Accountability, and Timetable

In order for goals to be achieved, HFFI Board of Directors, Staff, Committee Chairs, and volunteers will evaluate performance based on the outline above. This evaluation will be included in their individual action plans.

Evaluation will be the responsibility of the Director of Operations. S/he will do appropriate follow-up to the parties involved in order to receive the necessary data to determine whether the organization is meeting its goals.

The enforcement of the strategic plan will be the responsibility of the Board of Directors. The Committee Manual and Board of Directors Manual need to be updated to help with implementation.

In the case of programmatic, financial, or operational changes, amendments can be added to the strategic plan outlining the Board-approved modifications.

A summary of the Strategic Plan will be shared with membership at the annual membership meeting. Data collected to measure Strategic Plan performance will be reported yearly at this gathering.

At the end of 5 years (March 2024), the Director of Operations will make a final evaluation report. Based on this document, a new Strategic Plan will be developed by the HFFI Board of Directors and Staff, and implemented in March 2025.

Conclusion

To meet the goals of the Historic Fredericksburg Foundation, Inc., the Board of Directors will bring on new Board Members with specific skills and knowledge. Over the next five years, the Board will be expanded to better reflect the structure outlined in the HFFI by-laws. Committees will use the Strategic Plan as a guide to achieve organizational goals.

To make money, sometimes it is necessary to spend money. The organization is being strategic about how to earn extra money and how it would be spent in a way that furthers its mission.

The support of HFFI volunteers and membership necessary to fulfill this plan cannot be overstated. While the organization will bring on an additional staff member in the next five years, it is still primarily a volunteer-operated entity. Therefore, the Board of Directors and Staff will recognize its supporters as part of its regular operations. They will aim to go above and beyond in order to provide excellent customer service to volunteers, members, and the community.

Each goal will be worked on simultaneously, which calls for a high level of multi-tasking. However, time needs to be spent to quantify achievements so it can be determined if progress is being made. This type of tracking will be included in each volunteer, staff, and board members' duties moving forward.

By implementing this Strategic Plan, the community will be better educated on the value of preservation. HFFI is not looking for a drastic expansion or overhaul of its current operations, but simply, to address what the mission calls for: to preserve, protect, and revitalize the distinctive historic environment and cultural resources of the Fredericksburg area.

HFFI Strategic Plan

Attachments

Attached is the list of Committee Chairs. Each Committee, as well as any sub-committee, should establish an Action Plan.

At a minimum, Action Plans should include:

- Purpose of the committee.
- Members in committee and contact information.
- Plan for outreach for additional members if needed. Minimum requirements or desired skills for being in the committee.
- Goals and strategies the committee addresses from the strategic plan.
- Information/Priority Measures that will be tracked and shared with the Director of Operations for evaluation.

Committees

- Advocacy Committee
- Education and Research Committee
 - Publications Committee
 - Marker Committee
 - Oral History Committee
- Events Committee
 - Candlelight Tour Committee
- Financial Resources Committee
- Funding Committee
- Legal Counsel
- Operations
 - Marketing
 - Membership
 - Preservationist Job Description
 - Volunteers
- Policy and Procedures Committee (includes By-Laws)
- Real Estate Committee
 - Lewis Store Task Force
 - Summer Beam Committee
 - Maintenance Committee
- Ways and Means Committee