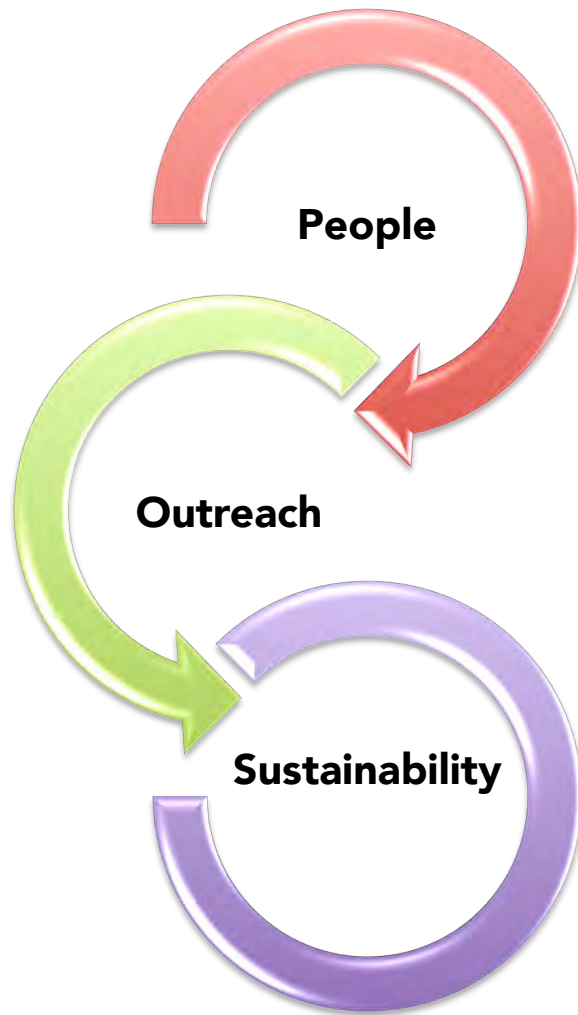




Strategic Plan 2017-2022



Heritage Works' 2017 - 2022 Strategic Focus Areas



Creative Innovation for People

- 1) Program Participants
- 2) Staff
- 3) Board
- 4) Committees
- 5) Partners
- 6) Individual Donors
- 7) Social Movements
- 8) Work plans
- 9) Professional development

Creative Innovation for Outreach

- 1) Marketing
- 2) Branding
- 3) Communications
- 4) Collaborations

Creative Innovation for Sustainability

- 1) Diversify funding streams
- 2) Cultural Center Planning
- 3) Programming
- 4) Evaluation & Data
- 5) Leadership Succession Planning
- 6) Creating New Models

Heritage Works' 2017 – 2022 Strategic Plan

Creative Innovation for People

Goal: To enhance organizational capacity to implement dynamic programming, advance mission, fundraise, and ensure leadership succession for the staff and board.

Objectives: Heritage Works will...

- A. Increase its number of employees, fostering a creative and innovative workforce.
- B. Strategically recruit new board members who are passionate for the mission and ready to contribute.
- C. Increase its bandwidth through volunteers and in-kind services to accomplish its strategic priorities.
- D. Intentionally plan for the leadership succession of the executive director.

Success Indicators	Target Metric	Completion Date	Champions
1) Staff grows to four full time employees, demonstrating staff retention year over year	4	Q4 2022	Board and Executive Director
2) Number of trustees grows to at least nine board members committed to fundraising and contributing # hours toward board tasks each month	<ul style="list-style-type: none"> • Members: 9 • Hours/ month: # 	Q4 2017	Board
3) All board members donate annually	100%	Ongoing	Board Chair and Treasurer
4) Development and Marketing committees will be fully operational with charters and sufficient volunteers to achieve goals	<ul style="list-style-type: none"> • Committees: 2 • Members/ Cmte: 5 	Q4 2022	Board
5) Complete an emergency and long-term leadership succession plan	2 plans	Q4 2022	Board with Executive Director input



Creative Innovation for Outreach

Goal: To increase the visibility of Heritage Works and its dynamic programming.

Objectives: Heritage Works will...

- A. Enhance its marketing strategy and plan.
- B. Enter into new collaborations to leverage existing resources and spark creative and innovative opportunities.

Success Indicators	Target Metric	Completion Date	Champions
1) Increased organizational social media activity evidenced by:			
a. Development of Snap Chat and Instagram accounts	Complete	Q1 2018	Staff
b. # weekly posts across all social media platforms	# / quarter	Ongoing	Staff
c. #% increase of mailing list members, annually	# / year		
2) Increased response from supporters to social media activity via:			
a. # new social media followers annually	#	Ongoing	Staff
b. # of online purchases of merchandise	# / year	Ongoing	Staff
c. #% increase in attendance of events promoted online, year over year	# / year	Ongoing	Staff
3) Minimum of one new institutional/organizational partnership or collaboration supportive of strategic goals, annually	1 / year	Ongoing	Staff

Creative Innovation for Sustainability

Goal: To ensure the longevity of Heritage Works' mission and ability to support the community.

Objectives: Heritage Works will...

- A. Achieve a secure financial position and grow its reserves.
- B. Commence a planning process for a capital campaign to develop a cultural center that will provide a space for programming and community building.

Success Indicators	Target Metric	Completion Date	Champions
1) 15% increase in operating income year over year to \$800,000	<ul style="list-style-type: none"> • 15% / year • \$800,000 	Q4 2022	Board and Staff
2) Decreased reliance on grants via increase in individual donors/sustainers by #, giving an increased amount of #%, year over year	<ul style="list-style-type: none"> • # • #% / year 	Q4 2022	Board and Staff
3) Increased number of major donors totaling #, giving annual gifts amounting to \$# or more	<ul style="list-style-type: none"> • # • \$# 	Q4 2022	Executive Director and Board Chair
4) Raised additional \$# annually for salaries and benefits of new hires plus 3 months operating reserve	<ul style="list-style-type: none"> • \$# • \$125,000 	Q4 2022	Executive Director and Board
5) Secured short-term, no-interest loan to support cash flow	\$#	Q4 2020	Executive Director
6) Established a CD in the amount currently in the bank	\$#	Q4 2021	Executive Director
7) Successfully completed two annual fundraising events, that combined net \$# annually	<ul style="list-style-type: none"> • 2 / year • \$#/ year 	Q4 2018	Staff and Board
8) Evidence of a strong case for support that may be customized based on target audience	Complete	Q1 2018	Staff and Board
9) Completed feasibility study including architectural renderings for Cultural Center	Complete	Q4 2022	Board and staff



Strategic Filter

In the event that a unique opportunity arises for which Heritage Works did not plan, organizational leaders would deviate from this plan only to undertake strategies that meet at least four out of these seven criteria:

1. Are consistent with our mission, vision, and values
2. Build on the value of our organization
3. Will yield a sustainable results
4. Meet criteria related to our geographic scope
5. Will demonstrate measureable results
6. Will reinforce the community's view of us
7. Support us in moving to our next stage of development