The Conococheague Institute
... Where History Comes to Life

Strategic Plan
December 2023 to 2026 and beyond
30 YEARS OF PRESERVING THE Frontier

BACKGROUND AND HISTORY OF THE CONOCOQUEAGUE INSTITUTE

Founded in 1994 to serve as a hands on regional learning center by Dr John C. Stauffer, CI has the mission to develop and foster awareness, understanding, and stewardship of the cultural and natural history of the Appalachian frontier of Pennsylvania, Maryland, and Virginia.

We are headquartered within Rock Hill Farm, a well-preserved historic farmstead that was established in the early 18th century in Franklin County, PA, near the village of Welsh Run. Our 30-acre site is listed on the National Register of Historic Places and includes two historic house museums with outbuildings, a research library, two relocated historic log structures, walking trails with access to a pioneer cemetery, and several historic gardens.

Over the last 30 years CI has led the way for frontier preservation by hosting events, programs, relocating and renovating structures, leading lectures and publishing books on the regions history.

WHERE WE ARE TODAY

In recent years renewed support from donors, a professional staff, dedicated Board of Directors and focused mission has launched CI into a award winning historic site and museum.

Today visitors to the Conocoqueague Institute experience a multisensory journey into our shared past. Vigorous engaging programs annually draw 1000’s of students to learn about Colonial Life, Medicine and Surgery, Women’s Roles, Militia Drills, Crafts, and Natural Conservation.

Free programs and exhibit access year round every Saturday makes site accessibility consistent and draws in tourism across the tri-state and beyond. Site access is available year round from dawn to dusk and includes nature trails, interpretive paths, picnic areas and a playground.

Contact Us :

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WHY A STRATEGIC PLAN?
Due to its success in invigorating programs, engaging students and increasing awareness for early American history it’s growth in recent years has skyrocketed with multiple awards (Non Profit of the Year, Educator of the Year, PA Museums Institutional Award), new grants funding exciting initiatives, and more culminating in a generous $500,000.00 endowment contribution from R. Kurtz Jr. A further $350,000.00 contribution from an anonymous founder has resulted in a position of strength to plan the future of the frontier.
During two sessions with a volunteer consultant (Gail Reeder), our Board of Directors and staff set forth to analyze our recent growth and where the organization seeks to be in the future.
With input from our volunteers, founding members and the public the Conococheague Institute is proud to share our Vision, Mission, and Strategic Plan for the Future of the Frontier.

OUR VISION
Become the leading museum and historic site in the region that represents 18th century frontier life accurately, offers to the public engaging learning experiences, and continues to grow and further its reach both financially and in reputation.

OUR MISSION
The mission of the Conococheague Institute is to develop and foster awareness, understanding, and stewardship of the cultural and natural history of the Appalachian frontier of Pennsylvania, Maryland, and Virginia.

The Future of the Frontier Awaits!
## PROPERTY STRATEGIC OBJECTIVE

CI has a ‘Campus Master Plan’ that focuses on the natural and historic integrity of the property yet incorporates 21st century needs and infrastructure when necessary. The plan is followed to manage the site growth within the scope that can be controlled.

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| Develop campus master plan that guides physical infrastructure growth and existing preservation needs | Engage Architect to develop plan. BFM engaged for Winter-Spring 2024 ($12,676)  
*Action Date: Current* | Board of Directors to evaluate BFM campus master plan and set timeline goals and priorities for future infrastructure projects  
*Action Date: Summer 2024* | Fundraising and Capital Campaign for new Infrastructure  
*Action Date: Ongoing* | CI offers modern and accessible museum, library, work areas and presentation zones with a clear site flow and parking. Historic areas are preserved to represent a working 18th century farm (i.e. livestock, cider mill, garden, agriculture, etc.) |
| Follow and Implement Campus Master Plan                                 | Review annually and measure completed goals and next priority area  
*Action Date: Ongoing* |  |  | CI continues to expand to reach it's potential as the leading area museum on 18th century life |
| Incorporate field and woods natural resources into managed areas         | Nature Committee to meet to discuss sustainable goals (field for wildflowers, birding nesting area, tourism crops, wood restoration areas, etc.)  
*Action Date: February 2024* | Board of Directors to review and approve short and long term plan. Meet with local farmers about field usage  
*Action Date: April 2024* |  | All of CI’s natural resources are utilized for best environmental stewardship and to benefit the community |
| Secure Property Boundary of Woods, Barn and adjacent areas               | Secure gifts of adjacent property and seek grants land acquisition as needed for  
*Action Date: Ongoing* | Incorporate acquired land/area and update master plan  
*Action Date: 3-5 years* |  | CI continues to grow as a site, has legal ownership of all public areas for safety, liability and preservation needs. |
PROGRAMMING STRATEGIC OBJECTIVE

CI offers historically accurate curriculum based programs that serve as an example of frontier life in the 18th century, while being relevant to a 21st century audience. The programs incorporate 5 sense experiences that attract and educate all ages while making best use of our property, site and assets.

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<td>Become a working farmente (livestock, gardens, trades and equipment) that reflects an 18th century homestead</td>
<td>Meet with animal husbandry experts in the region to discuss needs, budgeting</td>
<td>Build historic fencing &amp; animal pen between cabin and tavern. Use on-site resources (work to be completed by staff &amp; students)</td>
<td>Board of Directors to assess animal husbandry budget and management plan (seek funding as needed)</td>
<td>Launch heritage breed animal husbandry programs to coincide with existing programs</td>
<td>CI continues to develop its working farmente program, becoming known as a regional expert on heritage breed animal husbandry. CI follows the master plan to grow other area roles and trades</td>
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<td>CI’s programs accurately reflect regional life and culture (Welsh heritage)</td>
<td>Review Interpretive Program Overview (staff and Board) and update</td>
<td>Staff to revise and compile training packets for site history and programs</td>
<td>Staff to design and install exhibit in Welsh Barrens Visitor Center on Welsh Heritage</td>
<td>CI’s programs honor the original settlers of the region, and accurately reflect their cultural identity and unique frontier situation</td>
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<td>CI’s programs reflect the shared heritage of the region with Indigenous representation</td>
<td>Will Sheppard to research &amp; collate local history and review with Board how it can be used in programming</td>
<td>Reach out to Tribal leaders with request to collaborate on programs and projects</td>
<td>Work with Tribal groups to create program partnership</td>
<td>CI programs are inclusive of the shared heritage and history of the region, representing life on the frontier for all its inhabitants</td>
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<td>For America250, focus programming on a ‘day in the life’ of an indentured servant in 1776</td>
<td>Research &amp; concept program summary (staff and volunteers)</td>
<td>Develop training material and promote America250 incorporation (staff)</td>
<td>Use 2025 events to test and advertise America250 programs</td>
<td>Launch new programs in 2026 for national Anniversary</td>
<td>CI’s American250 programs ties in the narrative of an indentured servant in conjunction with the celebration of the birth of a nation. Tourism boosted by national appeal of history</td>
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## STAFF STRATEGIC OBJECTIVE

CI’s staff are professional, qualified, experienced, appropriately certified, welcoming and respectful of all visitors. The staff are well compensated and experience little turnover. CI staff continuously nurtures new opportunities and growth through paid student interns.

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| Add a Groundskeeper/Gardening position to maintain CI’s extensive natural resources, unique biospheres, rose gardens, orchards | Post and hire position (part-time 16 hours per week) or secure outside contractor  
*Action Date: January-March 2024* | Implement management plan for rose gardens, orchards and flower beds  
*Action Date: Spring 2024* | Evaluate position and discuss adjustments for winter and 2025  
*Action Date: Fall 2024* | CI’s gardens and grounds are professionally kept for visitor appeal, while freeing up existing staff to focus on primary duties |
| Evaluate staff needs and potential growth | Executive Committee and Budget Committee to review staffing needs  
*Action Date: October 2024* | Expand staff roles (or adjust existing staff roles) for animal husbandry programs  
*Action Date: 2025* | CI’s program drives personal decisions and as growth occurs, appropriate staff adjustments are made to benefit the mission |
| Set and review staff objectives and goals | Executive Director to set Spring/Summer and Fall/Winter goals with staff team, and review upon completion  
*Action Date: Ongoing* | | CI’s staff are focused and driven to further the organization’s mission and growth |
| Ensure CI’s staff are professional and trained with up to date resources | Staff to seek appropriate professional development courses for 2024  
*Action Date: January 2024* | Staff to complete appropriate professional development courses for 2024  
*Action Date: January 2024* | CI’s staff continue to lead as experts in their field |
| Ensure staff are well compensated with benefits | Research local benefit options for staff (Board of Directors)  
*Action Date: Winter 2023* | Evaluate staff compensation during annual budget preparations  
*Action Date: October 2024* | Evaluate staff compensation during annual budget preparations  
*Action Date: October 2025* | CI’s staff are well compensated and the team cohesion grows due to little turnover |
# BOARD OF DIRECTORS STRATEGIC OBJECTIVE
The Board of Directors is representative of our community, and promotes the organization. They are actively engaged in CI events, serve on committees, financially donate to the organization, and identify potential donors.

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| The committees responsibilities are clearly defined, and meet accordingly to further CI’s mission | Review committee charters with the Board of Directors and set dates for 2024 meetings  
*Action Date: February 2024* | Committees engage in their stated goals  
*Action Date: Spring-Winter 2024* | Review committee accomplishments and recruit new members  
*Action Date: EoY 2024* | CI’s committees utilize expanded skill base of the Board of Directors and volunteers                |
| The Board ensures fiscal responsibility, regularly reviews policies, and updates committees as needed | Review existing CI policies and make adjustments as needed  
*Action Date: March 2024* | Complete full audit with CPA of 2023 finances  
*Action Date: Spring 2024* | Board presents any changes in policy to CI general membership for full vote during annual meeting  
*Action Date: October 2024* | Updated policies keep CI in line with modern standards and audits allow CI to apply for larger grants and gifts |
| The Board works with the Executive Director to review program effectiveness and make recommendations for adjustment when appropriate | Executive Committee to meet with the Executive Director during annual review  
*Action Date: June 2024* | Executive Committee to meet with the Executive Director during annual review  
*Action Date: June 2025* | Executive Committee to meet with the Executive Director during annual review  
*Action Date: June 2026* | CI’s leadership continues to work together to ensure the best for the organization               |
| The Board has a system for evaluating itself and the individuals that serve and annually reviews strengths and weaknesses | Revised Google form evaluation survey distributed to Board of Directors  
*Action Date: January 2024* | Board Nominating Committee interview new potential board members  
*Action Date: Summer to Fall 2024* | New Board members voted and sworn in during annual members meeting  
*Action Date: October 2024* | CI’s Board of Directors is aware of it's duties and responsibility and seeks new members to supplement roles |
| The Board engages in annual fundraising efforts, and strengthens its connection with development | Each Board member annually gives to the organization  
*Action Date: EoY 2024* | Each Board member brings several guests annually to CI in their role as ambassadors  
*Action Date: Ongoing* | Board of Directors to complete fundraising training to help during capital campaigns  
*Action Date: 2024-2025* | CI’s Board of Directors increase funding of the organization, utilizing their connections to the larger community |
## FINANCIAL STRATEGIC OBJECTIVE

CI is financially stable, sets and adheres to an annual budget that maintains proper stewardship. CI will build its endowment fund to $10 million and have a strong ongoing fundraising program.

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| Set and adhere to an annual budget that takes into account sustained growth and the campus master plan | Budget Committee to propose 2024 budget and be approved by the Board of Directors  
*Action Date: Nov 2023* | Budget Committee to review first quarter budget and suggest changes as needed  
*Action Date: Summer 2024* | Budget Committee to propose 2025 budget and be approved by the Board of Directors  
*Action Date: Nov 2024* | Annual Budget allows for strategic planning of resources, and grants/donations to be sought for planned goals |
| Continue to grow endowments to provide annual stable funding and long term planning | Reach $1,000,000 in endowment funds by EoY ($78,892 left to reach goal)  
*Action Date: December 31st 2023* | Identify and meet with new donors to make planned gifts to the endowment program  
*Action Date: Ongoing* | Develop legacy giving program and estate bequests  
*Action Date: Ongoing* | Interest earned from CI's endowments funds annual educational programs and exhibits for perpetuity |
| Continue to grow CI's membership with consistent increase with businesses, individuals, families, founders and donors | Review lapsed members and send renewal notices  
*Action Date: January 2024* | Promote membership benefits with visitors and local businesses  
*Action Step: Ongoing* | Review membership database and seek improvements in reach and retention  
*Action Step: Annually EoY* | CI's membership is constantly expanding, providing financial stability to the organization and increasing the audience that can benefit from our programs |
| Set annual fundraiser events that bring awareness to specific needs and funding opportunities | Contact legacy donors from the past 30 years about lifetime gifts and 30th anniversary plaque  
*Action Date: November 2023* | Host 30th anniversary fundraiser event (Welsh theme) with all donors invited to celebrate  
*Action Date: May-June 2024* | Development Committee to meet to plan 2025 fundraiser events  
*Action Date: September 2024* | High profile fundraiser events bring in annual funding streams for specific needs and niches |
| Discuss possibility of future fundraising position for increased revenue | Executive Committee to meet with Executive Director to review annual donations and grants and the feasibility of fundraising position  
*Action Step: September 2024* | Budget Committee to discuss implementation in 2025 budget  
*Action Step: November 2024* | Leverage dedicated fundraising position with CI's existing assets to maximize funding potential |
**REPUTATION STRATEGIC OBJECTIVE**

CI is the preeminent 18th century historic site in the region, widely known for its engaging programs, unique assets and history. CI is a leader in the community, working with partners to benefit historic heritage & tourism

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| CI is widely known amongst the community for its programs, natural resources, events and it’s assets | Annually identify new schools for educational bookings the following year  
*Action Date: Dec 2023* | Design new logo for 30th anniversary to be unveiled as part of 2024 events  
*Action Date: February 2024* | Increase marketing for special events and site usage  
*Action Date: Summer 2024* | CI is known as the number 1 resource for school bookings with regards to cultural and natural programs, is used regularly by the community, and is a household name |
| CI offers safe & authentic hands on experiences, and are committed accuracy of the time period being portrayed | Ensure all staff and volunteers have required background checks annually to work with children  
*Action Date: Jan-March 2024* | Revise training material for programs and make available to new volunteers  
*Action Date: Ongoing* | Develop and host external teacher trainings on site, to share our experiences with area faculty  
*Action Date: August 2024* | CI maintains integrity as the leading experts on our program subjects, and advise other organizations and faculty |
| CI remains financially available to the community and physically accessible | Board of Directors will evaluate cost of programs and events and make adjustments for following year  
*Action Date: Fall 2024* | CI will seek accessibility goals in accordance with the Campus Master Plan  
*Action Step: Ongoing* | | CI’s resources are available for all facets of the community, so everyone can share in our cultural heritage |
| CI aims to tell the history of everyone who has heritage in the region, ensuring all are made welcome and represented | Design and install new interpretive panels that include Indigenous land acknowledgement, history of the enslaved and women’s roles  
*Action Date: EoY 2023* | Work with Indigenous communities to further tell the story of the original inhabitants of the region  
*Action Date: 2024-2026* | Seek partnership with groups exploring untold historic aspects  
*Action Date: 2024-2025* | CI accurately represents the past in all it’s aspects, and works with underrepresented groups to explore their history and story |
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