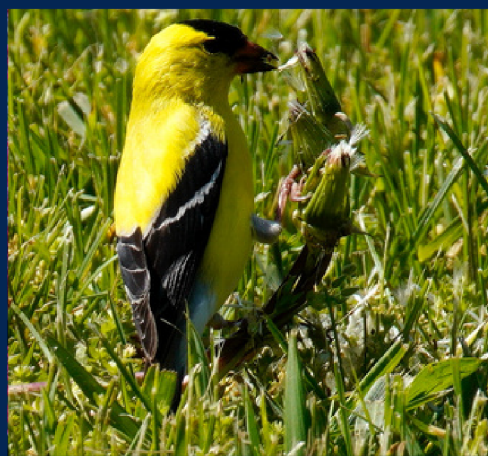


The Conococheague Institute
... Where History Comes to Life

Strategic Plan

December 2023 to 2026 and beyond



30 YEARS OF PRESERVING THE *Frontier*

BACKGROUND AND HISTORY OF THE CONOCOCHIEAGUE 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 Conococheague 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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*Eliab Negley House 1994
before restoration*



*Eliab Negley House 2015
after restoration*



*Negley House today host to
numerous educational programs*



Evening events on Tavern Life
in the restored Piper Cabin



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!



CI staff and students from Mercersburg
Academy accepting \$1,000,000 donation from
R Kurtz, for Early American life endowment



Summer Camp students
learning about laundry



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.

Action	1st Step	2nd Step	3rd Step	Ultimate Goal
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) <i>Action Date: Current</i>	Board of Directors to evaluate BFM campus master plan and set timeline goals and priorities for future infrastructure projects <i>Action Date: Summer 2024</i>	Fundraising and Capital Campaign for new Infrastructure <i>Action Date: Ongoing</i>	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 <i>Action Date: Ongoing</i>			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.) <i>Action Date: February 2024</i>	Board of Directors to review and approve short and long term plan. Meet with local farmers about field usage <i>Action Date: April 2024</i>		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 <i>Action Date: Ongoing</i>	Incorporate acquired land/area and update master plan <i>Action Date: 3-5 years</i>		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.

Action	1st Step	2nd Step	3rd Step	4th Step	Ultimate Goal
Become a working farmette (livestock, gardens, trades and equipment) that reflects an 18th century homestead	Meet with animal husbandry experts in the region to discuss needs, budgeting. Research period sources for animal husbandry <i>Action Date: Current</i> COMPLETED Dec 2023	Build historic fencing & animal pen between cabin and tavern. Use on-site resources (work to be completed by staff & students) <i>Action Date: Spring - Summer 2024</i>	Board of Directors to assess animal husbandry budget and management plan (seek funding as needed) <i>Action Date: Winter 2024</i>	Launch heritage breed animal husbandry programs to coincide with existing programs <i>Action Date: 2025</i>	CI continues to develop its working farmette program, becoming known as a regional expert on heritage breed animal husbandry. CI follows the master plan to grow other area roles and trades
CI's programs accurately reflect regional life and culture (Welsh heritage)	Review Interpretive Program Overview (staff and Board) and update <i>Action Date: Winter 2023</i> COMPLETED Dec 2023	Staff to revise and compile training packets for site history and programs <i>Action Date: Dec 2023 to April 2024</i>	Staff to design and install exhibit in Welsh Barrens Visitor Center on Welsh Heritage <i>Action Date: Spring-Summer 2024</i>		CI's programs honor the original settlers of the region, and accurately reflect their cultural identity and unique frontier situation
CI's programs reflect the shared heritage of the region with Indigenous representation	Will Sheppard to research & collate local history and review with Board how it can be used in programming <i>Action Date: May 15th 2024</i>	Reach out to Tribal leaders with request to collaborate on programs and projects <i>Action Date: Summer 2024</i>	Work with Tribal groups to create program partnership <i>Action Date: 2-5 years</i>		CI programs are inclusive of the shared heritage and history of the region, representing life on the frontier for all its inhabitants
For America250, focus programming on a 'day in the life' of an indentured servant in 1776	Research & concept program summary (staff and volunteers) <i>Action Date: Winter-Summer 2024</i>	Develop training material and promote America250 incorporation (staff) <i>Action Date: EoY 2024</i>	Use 2025 events to test and advertise America250 programs <i>Action Date: 2025</i>	Launch new programs in 2026 for national Anniversary <i>Action Date: 2026</i>	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

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.

Action	1st Step	2nd Step	3rd Step	Ultimate Goal
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 <i>Action Date: January-March 2024</i>	Implement management plan for rose gardens, orchards and flower beds <i>Action Date: Spring 2024</i>	Evaluate position and discuss adjustments for winter and 2025 <i>Action Date: Fall 2024</i>	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 <i>Action Date: October 2024</i>	Expand staff roles (or adjust existing staff roles) for animal husbandry programs <i>Action Date: 2025</i>		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 <i>Action Date: Ongoing</i>			CI’s staff are focused and driven to further the organizations 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 <i>Action Date: January 2024</i>	Staff to complete appropriate professional development courses for 2024 <i>Action Date: December 2024</i>		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) <i>Action Date: Winter 2023</i> COMPLETED Dec 2023	Evaluate staff compensation during annual budget preparations <i>Action Date: October 2024</i>	Evaluate staff compensation during annual budget preparations <i>Action Date: October 2025</i>	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.

Action	1st Step	2nd Step	3rd Step	Ultimate Goal
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 <i>Action Date: February 2024</i>	Committees engage in their stated goals <i>Action Date: Spring-Winter 2024</i>	Review committee accomplishments and recruit new members <i>Action Date: EoY 2024</i>	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 <i>Action Date: March 2024</i>	Complete full audit with CPA of 2023 finances <i>Action Date: Spring 2024</i>	Board presents any changes in policy to CI general membership for full vote during annual meeting <i>Action Date: October 2024</i>	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 <i>Action Date: June 2024</i>	Executive Committee to meet with the Executive Director during annual review <i>Action Date: June 2025</i>	Executive Committee to meet with the Executive Director during annual review <i>Action Date: June 2026</i>	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 <i>Action Date: January 2024</i>	Board Nominating Committee interview new potential board members <i>Action Date: Summer to Fall 2024</i>	New Board members voted and sworn in during annual members meeting <i>Action Date: October 2024</i>	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 <i>Action Date: EoY 2024</i>	Each Board member brings several guests annually to CI in their role as ambassadors <i>Action Date: Ongoing</i>	Board of Directors to complete fundraising training to help during capital campaigns <i>Action Date: 2024-2025</i>	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.

Action	1st Step	2nd Step	3rd Step	Ultimate Goal
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 <i>Action Date: Nov 2023</i> COMPLETED Nov 2023	Budget Committee to review first quarter budget and suggest changes as needed <i>Action Date: Summer 2024</i>	Budget Committee to propose 2025 budget and be approved by the Board of Directors <i>Action Date: Nov 2024</i>	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 (\$73,892 left to reach goal) <i>Action Date: December 31st 2023</i>	Identify and meet with new donors to make planned gifts to the endowment program <i>Action Date: Ongoing</i>	Develop legacy giving program and estate bequests <i>Action Date: Ongoing</i>	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 <i>Action Date: January 2024</i>	Promote membership benefits with visitors and local businesses <i>Action Step: Ongoing</i>	Review membership database and seek improvements in reach and retention <i>Action Step: Annually EoY</i>	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 <i>Action Date: November 2023</i> COMPLETED Nov 2023	Host 30th anniversary fundraiser event (Welsh theme) with all donors invited to celebrate <i>Action Date: May-June 2024</i>	Development Committee to meet to plan 2025 fundraiser events <i>Action Date: September 2024</i>	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 <i>Action Step: September 2024</i>	Budget Committee to discuss implementation in 2025 budget <i>Action Step: November 2024</i>		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

Action	1st Step	2nd Step	3rd Step	Ultimate Goal
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 <i>Action Date: Dec 2023</i> COMPLETED Dec 2023	Design new logo for 30th anniversary to be unveiled as part of 2024 events <i>Action Date: February 2024</i>	Increase marketing for special events and site usage <i>Action Date: Summer 2024</i>	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 <i>Action Date: Jan-March 2024</i>	Revise training material for programs and make available to new volunteers <i>Action Date: Ongoing</i>	Develop and host external teacher trainings on site, to share our experiences with area faculty <i>Action Date: August 2024</i>	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 <i>Action Date: Fall 2024</i>	CI will seek accessibility goals in accordance with the Campus Master Plan <i>Action Step: Ongoing</i>		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 <i>Action Date: EoY 2023</i> COMPLETED Sent 2023	Work with Indigenous communities to further tell the story of the original inhabitants of the region <i>Action Date: 2024-2026</i>	Seek partnership with groups exploring untold historic aspects <i>Action Date: 2024-2025</i>	CI accurately represents the past in all it’s aspects, and works with underrepresented groups to explore their history and story

Thank you for reading.
We look forward to sharing
the journey with our
community!

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