Historic Oakland Foundation STRATEGIC PLAN 2024-2026

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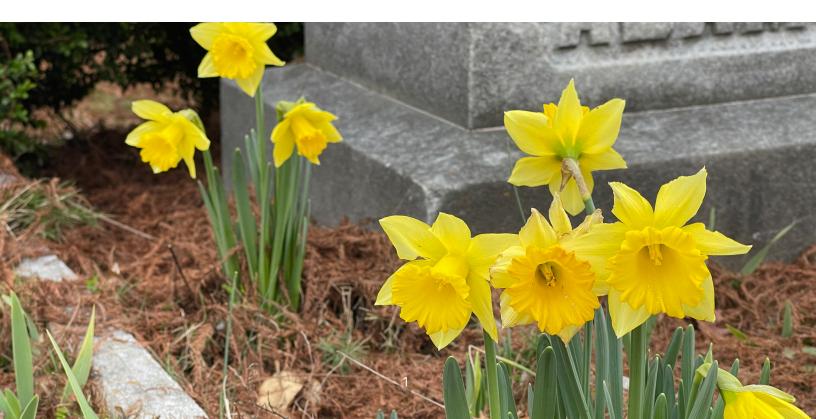
INTRODUCTION

Historic Oakland Cemetery is a jewel in Atlanta's crown.

Each day Historic Oakland Foundation (HOF) is changing ideas of what a cemetery can be in service to its community. The success of HOF's first-ever capital campaign, *Living History*, has laid the foundation for the organization's next fifty years. This strategic plan seizes the momentum and progress of the last ten years and continues to invest in the Cemetery and organization in strategic ways to expand how HOF cares for and shares historic Oakland Cemetery. It also builds upon the Foundation's recent progress, including investing nearly \$17,500,000 in capital projects at Oakland Cemetery, accomplishing half of the 2017 Master Plan, and expanding the Cemetery's base of support.

A central aspiration underpins the development of this strategic plan: that historic Oakland Cemetery is a premiere historical and cultural site and a world-class garden, and that HOF is a first-class institution. It also builds upon the Foundation's recent progress, especially that enabled by the nearly \$17,500,000 *Living History* campaign which has allowed us to complete half of the 2017 Master Plan while expanding the Cemetery's base of support.

Oakland Cemetery is community critical and vital to the lives and wellbeing of the City of Atlanta. The work of this strategic plan will further enhance the Cemetery, expand the Foundation's community engagement and programmatic work, and continue to invest in the Foundation's ability to deliver on its mission to preserve, restore, enhance, and share Oakland Cemetery.



PERMANENT INSTITUTIONAL IMPERATIVES

We seek to continue our tradition of excellence and balancing the core symbiotic tenants of Historic Oakland Foundation's work: caring for historic Oakland Cemetery and sharing the Cemetery with the public. Our organizational health and this Strategic Plan depend on

- Executing the 2017 Oakland Cemetery Master Plan as thoughtfully and expeditiously as possible,
- Maintaining the Cemetery to the highest possible standards in partnership with the City of Atlanta,
- Conducting all work through our core values and with diversity, equity, inclusion, and access as central lenses of our work,
- Building upon our record of success to build community trust and support for the work of Historic Oakland Foundation,
- Sharing the cemetery, our work, and our innovative programming with ever-expanding audiences to deliver meaningful impact,
- Developing extensive and diverse business practices to ensure the short-, medium-, and long-term financial health and sustainability of Oakland Cemetery and Historic Oakland Foundation.

How will the strategic plan be monitored and evaluated?

- Annual operating plans developed by staff and presented to HOF's board each January
- Quarterly reporting to the HOF board

STRATEGIC PRIORITIES, OBJECTIVES, ACTIVITIES & METRICS



STRATEGIC PRIORITY 1: CREATING A PREMIERE CULTURAL AND HISTORICAL SITE

n the 47 years since the inception of HOF, the Foundation has transformed historic Oakland Cemetery and made it an important cultural and site that honors the lives of those buried there while providing a critical community space that deeply impacts those who visit.

To date, HOF has restored almost twenty acres of the Cemetery and works in partnership with the City of Atlanta to maintain all of Oakland's 48 acres. More visitors explore the Cemetery each year, and as we work to restore the Cemetery as quickly as possible, greater focus and intention needs to be placed on the quality of work, daily maintenance and operations, and visitor experience.

Objectives & Activities

I. Through Master Plan implementation, site signage, daily operations, and site maintenance, create a world-class, accessible visitor experience from the new Visitor Center across the Cemetery

Preserve and improve Greenhouse Valley including redeveloping the greenhouse and operations area

Continue the preservation momentum of the Living History Capital Campaign and restore Greenhouse Valley following the 2017 Master Plan

Evaluate current and future needs for workspace/nursery/etc and determine the best plan for the Operations Area so that it is well-kept, functional, efficient, and professional; develop a physical plan and seek necessary approvals

Create a plan to restore the entire cemetery by 2035:

- Develop a scope of work for hardscape, landscape, infrastructure work and coordinate with a development plan
- Create a staffing plan to account for in house hardscape plus contract labor and a phased increase in the care needs in horticulture
- Identify stormwater management areas of risk, develop tracking systems for emissions and waste related to restoration, and develop a plan to minimize environmental impact during restoration efforts moving forward

II. Focus on security, daily maintenance, restoration efforts, and the daily visitor experience for active and passive users

Refine how we work with the City of Atlanta across the Cemetery

Develop a collaborative care-program for Cemetery maintenance



III. Focus on environmental sustainability, stewardship, and resilience at both the new Visitor Center, inside the Cemetery, and through HOF operations

Develop and begin to implement an organization-wide sustainability and resiliency plan

Work with the HOF board, staff, and external stakeholders to develop an organizational sustainability and resiliency plan as guided by The Climate Toolkit

Document and report on reduced climate impact and improved organizational resiliency

IV. Continue to implement the 2017 master plan with a particular focus on the development of a columbarium and daily restoration and landscape activities

Build columbaria in multiple areas of the cemetery:

- Refine pricing/feasibility for both construction and sales
- Develop an operating agreement with the City that retains sales revenue for HOF
- Create scalable models and identify other areas in the cemetery for additional future columbaria

V. Continue strategic land acquisition to enhance visitor experience and improve HOF and Cemetery operations to the north, west, and east

- Acres of Cemetery restored and quality of restoration and landscape maintenance
- Visual appeal of the Cemetery including trash, operations area, etc.
- Number of safety/security incidents
- Development of a Sustainability & Resiliency Plan
- Use of the Oakland Cemetery GIS Database and maps for both visitor-centric functions as well as internal work orders and operational efficiency



STRATEGIC PRIORITY 2: EXPANDING AND DEEPENING ENGAGEMENT WITH DIVERSE AUDIENCES

H istoric Oakland Cemetery reflects the history and diversity of Atlanta. The investments in the *Living History* capital campaign provide HOF with the facilities necessary to expand our programming and more effectively serve and work with more expansive, diverse audiences and communities.

We know that In order for visitors to historic Oakland Cemetery to continue to become supporters, advocates, volunteers, or investors in its preservation and care, we need to prioritize a restored, safer, better cared-for cemetery. The opportunity before us includes enhancing existing programming, developing best-in-class programming to play an active role in shaping how Atlanta uses the past to think about itself in the present, and communicating and engaging with more diverse audiences.

Objectives & Activities

I. Expand existing programming and create new programming to serve more diverse audiences and increase access to Oakland Cemetery

Continue to develop evidence-based history, horticulture, preservation, civics, STEM, and workforce programming programming that is relevant, innovative, expands audience, and diversifies how the public thinks about Oakland

Expand our programmatic methodologies to connect with new audiences based on HOF's four core areas of community impact:

- Social well-being: valuing diverse communities
- Intellectual well-being: continued education
- Personal well-being: strengthened relationships
- Physical well-being: health and fitness

Expand HOF programming through the creation of new programs, community engagement activities, and outreach programs that reach expanded audiences (including family audiences, young professionals, underserved K-12 student audiences and workforce readiness, and Atlanta neighborhoods)

II. Deepen connections with existing HOF audiences and members to encourage repeat visitation and deeper engagement and investment in Oakland Cemetery / HOF

Expand and refine membership benefits to create more and deeper opportunities for members to become connected to HOF / Oakland Cemetery

Focus on the stewardship and cultivation of Young Professional, Student, and Family membership base development in conjunction with program development

III. Advance HOF's community engagement efforts to work collaboratively and authentically with more expansive communities and serve as a community convener

Build more expansive relationships with neighborhoods and communities not historically served by HOF, including Old Fourth Ward/Sweet Auburn, Summerhill, Chosewood Park, South Atlanta, and Southewest Atlanta

Develop deeper community engagement strategies, including community listening sessions and art, and use the new Oakland Cemetery Visitor Center as a place for convening community and neighborhood groups, open-houses, and civic dialogues

Continue to be an active partner and neighbor in projects outside of the cemetery gates, especially the Memorial Drive Greenway and Sweet Auburn's Hero Walk

IV. Improve awareness of Oakland through more expansive external marketing campaigns to expand and diversify attendance, memberships, donors, volunteers, and financial support

Develop a Cemetery-wide marketing / PR campaign to expand the base of support as we widen and diversify HOF's stakeholders

Expand the methodologies used to tell the stories of Oakland Cemetery and HOF to form deeper connections between audiences and the Cemetery / Foundation beyond program or event attendance

Refine and enhance Oakland branding to continue to build on the image of Oakland Cemetery beyond the traditional view of cemeteries, including redesigning HOF's logo and refreshing branding for the organization's 50th anniversary in 2026

Implement software solutions including Veevart and Salesforce Marketing Cloud in order to improve audience data collection and implementation to build personalized communication plans for different stakeholder groups (descendants, neighbors, community, City of Atlanta, members, volunteers, neighborhoods, non-profit partners, art organizations)

- Audience: Mailchimp email subscribers; social media followers; earned media "hits"; ticket sales; website views; length of visits to the website; diversity of publications/outlets featuring Oakland/HOF; depth of engagement with digital content; Trip Advisor / Google reviews; website hits and engagement, earned media metrics. Benchmark against Atlanta Botanical Garden, Piedmont Park, Atlanta History Center, Fernbank, and Zoo Atlanta
- **Member engagement**: Number of members; member retention rates; conversion of ticketholders to members; number of repeat attendees
- **Programming**: Unique visitor count; total visitor count; repeat visitor count; visitor satisfaction shown through survey and evaluation methods; number of students served; number of programs; number of free/reduced programs
- **Community engagement**: Attendance at community open houses; number and type of community partners; number of partner events in new Visitor Center and Bell Tower per 2023 baseline
- **Data and Systems**: Audience diversity (through data collection through Veevart & Salesforce)
- Visitor Satisfaction: Survey responses, repeat attendance, and membership purchases

STRATEGIC PRIORITY 3 ENABLING THE FULL POTENTIAL OF THE ORGANIZATION

N one of the progress at historic Oakland Cemetery since the founding of HOF has happened without the increasing investment of time, talent, and resources into our people: our staff, volunteers, and board. Historic Oakland Foundation's continued evolution to become a premiere non-profit organization in Atlanta relies on the investment in our people: our staff, volunteers, and board. We know that happy and invested-in people will continue to allow HOF to deliver on its mission and strategic priorities, and we must do that work while reflecting the city we represent. Since 2019, HOF has been intentionally engaged in organizational growth through the lens of DEIA (Diversity, Equity, Inclusion, and Access) funded by the Institute of Museum and Library Services (IMLS). Continuing this work with intention is a core component of this next strategic plan and the future growth of HOF.

Objectives & Activities

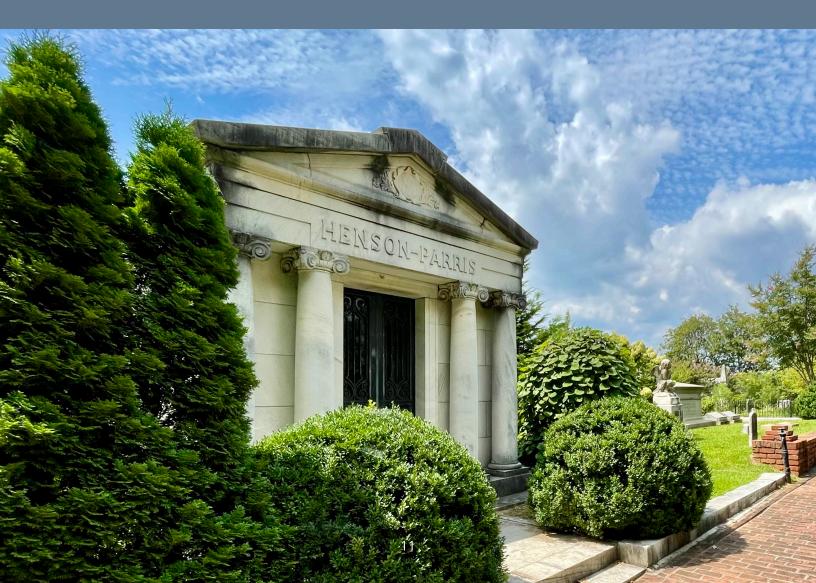
I. Continue to intentionally focus on organizational culture, core values, and the elevation of diversity, equity, inclusion, and accessibility.

II. Continue to strengthen organizational HR practices and procedures to promote stronger and more diverse staff recruitment and retention, including staff training plans, growth trajectories, enhanced benefits, and investing in effective performance management practices.

III. Recruit a more diverse group of volunteers and provide deeper training and enrichment opportunities for all HOF volunteers.

IV. Strengthen board committees and board governance practices to build leadership to lead HOF into the next 50 years.

- Staff training, staff retention, availability and affordability of staff benefits, HR policies and procedures
- Expand staff diversity (broadly defined) by continuing to expand organizational hiring practices
- Succession planning for key staff and board positions
- Staff and volunteer surveys reports
- Median age/% non-white staff, volunteers, and board
- Number of and attendance at volunteer appreciation and enrichment events
- Board giving targets, board diversity, 100% board giving, track give/get/do, board meeting attendance





STRATEGIC PRIORITY 4 SECURING THE FUTURE OF HISTORIC OAKLAND FOUNDATION

The success of the *Living History* capital campaign and HOF's recent organizational growth has been the result of sustained increases in funding that have allowed for greater investments in the Cemetery, in programming, and in the people who enact the mission.

Developing robust and sustainable organizational finances combined with sound financial management practices throughout the organization will not only allow for the delivery of short-term impact to the Cemetery and our stakeholders, but will also allow for the long-term health and success of Historic Oakland Foundation.

Objectives & Activities

I. Increase unrestricted donations to \$1,000,000 and enhanced and expansive fundraising, annual fund, and membership programs

Improve stewardship of key constituencies

Create an annual plan for ongoing asks for gifts and renewals of past gifts

Launch a corporate membership program

Create opportunities for passive giving through technology enhancements for memberships, ticket sales, etc.

Build a pipeline of major gift potential with a stewardship plan

Grow the Bell Tower Society to over 250 members with a moves management plan for members at the Contributing & Sustaining levels



II. Diversify organizational revenue and develop new revenue lines, to diversify economic risk

Expand programming calendar in Spring and Summer to reach broader audiences *e.g.,* summer camps, private rentals, after-school programs, spring events

Open expanded Museum Store in new Oakland Cemetery Visitor Center

Expand Rentals and revenue generating activities in Bell Tower and new Visitor Center

Columbarium Revenue (see above)

III. Build a robust Endowment giving strategy as we work towards a targeted \$60,000,000 endowment

Focus on planned giving including creating a recruitment plan that will encourage individuals to self-identify that HOF is included in a planned gift

IV. Actively fund the organization's Operating Reserve through surplus annual revenues

V. Focus on economic efficiency and good resource utilization throughout the organization with a particular focus on expanding net income from earned revenue

VI. Elevate control practices

Ensure visibility of financial and operational risks by the Board and any relevant subcommittees

Automate as many controls as possible to reduce the risk of human error, including creating a plan to implement and utilize computer-driven tool sets for external fundraising, internal control practices, and user experiences

Conduct internal audits quarterly to ensure adherence to policies

Review practices on a continuous basis to make sure they are effective and responsive to organizational and environmental needs



Metric:	Goal by 2026:	Baseline:
Total Revenue:	\$7,000,000/year	\$4,500,000
Unrestricted Revenue:	\$4,000,000/year	\$2,400,000
Restricted Revenue:	\$3,000,000/year	\$2,500,000
Seasonal Mix (Revenue mix between Q1/Q2 and Q3/Q4):	50%/50%	2022: 31%/69%
Endowment Revenue	\$500,000/year	\$250,000/year
Revenue Diversity (% of UR from special events):	Less than 40%	56%
Number of Major Donors:	250	125
Members	4,000	2,500
Number of Planned Gifts:	100	25

