



COASTAL DISCOVERY MUSEUM STRATEGIC PLAN 2016-2022

ACKNOWLEDGEMENT

This comprehensive Strategic Plan has been made possible through a grant from the Community Foundation of the Lowcountry. The Community Foundation is a leader in making positive and sustainable change in our area, and they have made a significant and lasting contribution to the Museum, the island, and our community through their support of this project.

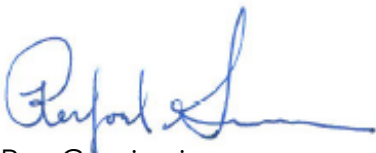
LETTER FROM CDM BOARD PRESIDENT & DIRECTOR

The Coastal Discovery Museum is a beloved community institution with a special place in the hearts of both local residents and visitors from around the country. Generations of school children have discovered the wonders of the Lowcountry here; retirees transplanted from afar have learned what makes this place so unique; and, families return every summer to enjoy the numerous programs offered for all ages. The Museum began in a storefront in 1985 with a focus on ecotourism. Later we shifted to a welcome center while adding significant educational components, and then truly blossomed in 2007 when we moved operations to the historic 68-acre Honey Horn property.

From its inception, the Museum has remained committed to its roots of preserving the local environment, history, culture and arts. These areas will continue to be our primary focus, but will have greater impact as stories about our local environment also inspire our visitors to take positive action in their own communities.

In June 2015, the Board, staff, and many stakeholders began working with Gail Anderson & Associates to develop a Strategic Framework that would establish the Museum's mission, vision, and values for the next ten years. Building upon the success of this project, and with generous funding from the Community Foundation of the Lowcountry, the Museum finalized a comprehensive Strategic Plan in late 2016.

We are deeply appreciative of our various stakeholders – especially our staff, board members, community leaders, the Community Foundation, and Gail Anderson - for enabling the development of this new Strategic Plan that will guide us to continued success in the future.



Rex Garniewicz,
President and CEO



Fred Manske, Jr.,
Chairman, Board of Directors

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EXECUTIVE SUMMARY

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This Strategic Plan represents a new vision and role for the Coastal Discovery Museum (CDM)... to make a difference locally with a global impact. The Museum has a long history of dedication to education; and the Board of Directors, CEO and staff feel the growing urgency to accelerate our efforts to protect the unique environment, history, and cultures of the Lowcountry for future generations. As a result, the new mission and vision reflect the Museum's desire to motivate the public to take action as stewards of the environment, land, and cultures of the Lowcountry based on a belief that every individual can make a difference. The approval of this new Strategic Plan in the wake of Hurricane Matthew reaffirms our commitment to address major environmental challenges, inequalities within our community, and the ongoing struggle to properly balance preservation and development.

The new mission is:

The Coastal Discovery Museum inspires people to care for the Lowcountry.

Together, CDM and its visitors:

- Discover connections between air, land, water, and living things, for greater environmental awareness
- Explore history, culture, and art to better understand ourselves and increase empathy toward others
- Take action to create a more sustainable and inclusive future

The vision for the future is:

The Coastal Discovery Museum is a national model for demonstrating how local stories inspire action for better stewardship.

Five goals support the direction of this Plan:

- Goal 1: Broaden CDM Visibility
- Goal 2: Increase Public Engagement
- Goal 3: Advance Exemplary Stewardship
- Goal 4: Build Organization of the Future
- Goal 5: Grow Financial Foundation

Some of the highlights of these goals include:

- Expanding digital strategies in order to reach more people and build an online community of engaged citizens who care about the environment and the Lowcountry;
- Offering new programs and ways of engaging the public with timely information, strategies and opportunities to participate in meaningful stewardship;
- Implementing a Master Plan that will embrace all aspects of the Honey Horn property to retain its natural beauty, upgrade historic structures, care for the living animals and unique plants;
- Planning for a new building at the entrance to the property that can host traveling exhibitions and orient and engage visitors in the many ways they can experience the Lowcountry;
- Growing staff capacity to serve an expanding audience, ensuring that the Board reflects the diversity of the Hilton Head Island community, and supporting a volunteer program that plays an integral role in the daily life of CDM; and,
- Expanding the annual operating budget to ensure that the aspirational goals in this Plan can be met while expanding earned income programs, launching an endowment campaign, and completing a capital campaign.

The Board and staff are energized and committed to making this Plan a reality. Because the ultimate outcome is for the public and the future vitality of Hilton Head Island and beyond, CDM invites community members and residents, guests to the Island, local leaders, and passionate preservationists to join together to build the community needed to make the dream of a more sustainable world a reality.

INTRODUCTION TO THE STRATEGIC PLAN

This Strategic Plan is presented in five distinct sections. Each section is described briefly in the next few pages.

The Institutional Assessment captures the findings from confidential interviews with internal and external stakeholders coupled with the review of documents.

The Strategic Framework is the foundation for the Plan including the mission, vision, values, and mission matrix, strategic definitions, and outcome measurements. The key components of the strategic framework are defined below.

- Mission is the reason CDM exists and why and how it makes a difference in the world. Every decision, every program, every action must support and emanate from this mission. It is the heart of CDM;
- Vision describes what CDM aims to achieve in 2030 with descriptors of the characteristics of those accomplishments;
- Values are the core beliefs that are embraced by the Board, staff, and volunteers. They should permeate the organizational culture, the feel of CDM and the visitor experience, and the way people engage with one another;
- CDM Mission Matrix is the visual expression of the role of CDM relative to the external world and the key defining elements of the organization. It is a tool to be used as a touchstone for envisioning new ways of working, the public interface, and the interrelationships between CDM and the public. It is also a visual decision-making tool;
- CDM Engagement Matrix is the visual depiction of the way the public engages with CDM. The Museum's goal is to empower visitors to act positively to preserve and protect the land, animals, and people in their community and beyond. Supporting the cycle of engagement are the four values that are present at all times in the work of CDM.
- Outcome Measurements are statements of expectations that measure success in advancing the Strategic Plan. Some measurements are quantitative and some are qualitative. Outcome measurements should be assessed once

a year at the annual Board retreat. Modifying the outcome measurements can and should occur at that time to ensure the measuring elements are the most realistic and align with CDM's priorities and the Strategic Plan.

The Strategic Goals include a brief introduction and explanation of the goal and future aims. Each of the five goals has a series of measureable objectives with accountability identified, necessary resources to complete, and a timeline for completion. The goals should translate to Board and Board Committee priorities, CEO priorities; individual staff work plans, volunteer work plans, and the annual budget. The resources identified reflect the required income to undertake the priorities, and the expenses that align with the priorities.

The Strategic Toolkit presents a number of tools developed during the process for the ongoing use by the Board, staff and volunteers.

- Tool 1: Tenets of Organizational Culture, captures the qualities of the organizational culture as shaped by the CEO and staff during the planning process.
- Tool 2: Decision-making Tool is to be used to guide and inform decisions moving forward.
- Tool 3: Program/Service Assessment Tool is a detailed tool designed to vet program and correlating direct and indirect costs. This tool may be used at the program proposal stage to test assumptions, and in certain cases, it may be used as a follow-up to the decision-making tool mentioned above.
- Tool 4: Sustainability + Profitability Chart is a quick reference tool shared during the planning process and is an aid to determining the alignment of a program relative to mission and sustainability.

The Key Terms are prevalent throughout the CDM Strategic Framework and the work of CDM.

- Community/communities: When used in the singular, as in the mission statement, "community" refers to the goal to bring together the people that make up the Lowcountry. When used in the plural as in the mission matrix,

"communities" embraces the many audiences CDM strives to engage, such as the Gullah community, the school community, tourists, etc.

- Story/stories: As in the use of community, the use of the singular "story" refers to the greater, complex story of the Lowcountry that is dynamic and multifaceted. When used in the plural, the word "stories" includes the wide range of threads that contribute to the greater the Lowcountry story.
- Lowcountry: Refers to a geographic area extending from Charleston to Savannah along the Atlantic coast. Influenced by tides, and consisting of salt marshes, estuaries, rivers, barrier islands and the adjacent mainland areas.

INSTITUTIONAL ASSESSMENT

INSTITUTIONAL ASSESSMENT

The institutional assessment included a review of internal documents, and confidential interviews with Board members, staff and volunteers, and external community stakeholders. (See Appendix D). As a result of this information gathering, several key issues emerged as areas to address during the planning process. Below are brief highlights of the assessment.

External Changes

During the planning process external issues were addressed from global trends to local concerns. In brief, these issues included:

- The dramatic changes occurring in the global environment. Because, CDM is located on Hilton Head Island additional issues such as the threat of hurricanes, protection of the sea turtle population, and rising sea levels are realities that are on the minds of local leaders and residents;
- The ubiquitous presence of technology in all facets of life has changed the face of education, communication, entertainment, and the way organizations do business;
- The strains of adapting and managing growth on Hilton Head Island revealed conflicting challenges. On the one hand new economic development may provide new business opportunities and a healthier local economy, and on the other hand, the constant demands to protect the coastal environment of the Island often means that these two strategies are at odds with one another;
- A high percentage of gated communities on the Island contrasting with non-gated communities struggling to gain access to proper sewage, water, and roads causes tension and reveals disparities; and,
- Greater interest in sharing the stories of the Gullah, the Native Islanders, and the first African American self-governed community in the Southern United States.

CDM Strengths

The top strengths of the Coastal Discovery Museum mentioned by interviewees included:

- *The unique natural beauty of the Honey Horn Site, historic buildings, and a one-of-a-kind place on the Island;*
- *Significant annual support from the Town;*
- *The quality of public programming;*
- *Dedicated Board, staff, & volunteers.*

Areas and opportunities cited to address in the Plan included:

- *Using the planning process to clarify the most relevant and sustainable role for CDM;*
- *Expanding marketing efforts to create higher visibility;*
- *Assessing current programs to ensure that the mix of public offerings match audience priorities;*
- *Upgrading and expanding use of technology for greater effectiveness;*
- *Addressing deferred maintenance and the demands of an aging property;*
- *Determining the future focus of CDM collections;*
- *Right-sizing the staff to match current operations and future growth;*
- *Enhancing the volunteer program;*
- *Strengthening the Board's leadership role in fundraising and ambassadorship; and,*
- *Ramping up fundraising efforts, building an endowment, and increasing earned revenue capacity.*

With research and findings revealed, the Board of Directors and CEO committed to seizing the opportunity to be strategic by ensuring that the infrastructure, resources, and leadership is in place to take CDM into the next chapter

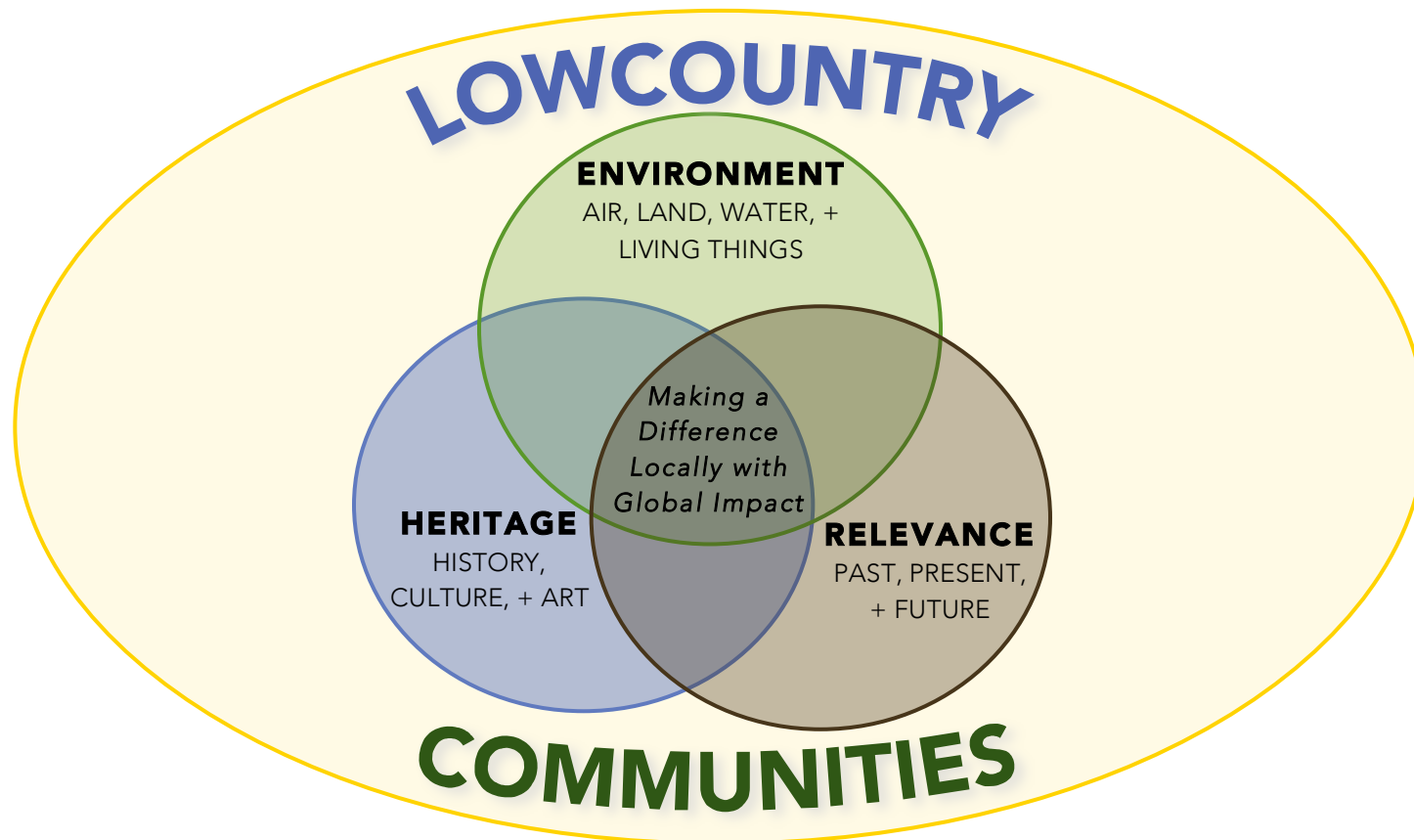
STRATEGIC FRAMEWORK

MISSION + MISSION MATRIX

The Coastal Discovery Museum inspires people to care for the Lowcountry.

Together, CDM and its visitors:

- Discover connections between air, land, water, and living things for greater environmental awareness
- Explore history, culture, and art to understand ourselves and increase empathy toward others
- Take action to create a more sustainable and inclusive future



VISION 2030

The Coastal Discovery Museum is a national model for demonstrating how local stories inspire action for better stewardship.

This vision has been achieved as evidenced by:

- ***A significant increase in attendance and participation in CDM*** due to consistent visibility on social media, through conversations with visitors and local residents, and with digital strategies which create an online community of engaged citizens who support our mission;
- ***Dynamic, personalized, hands-on experiences*** that invite visitors to have fun while they reflect on their role as advocates for the environment, history, culture, and the arts of the Lowcountry, and inspire them to take action, on-site and with the global community online;
- ***The implementation of a Honey Horn Master Plan that offers a holistic, high-quality experience of the 68 acre property*** featuring a state-of-the-art exhibition building, an interpretive path through all our environments, an interactive laboratory for studying nature and history, and a long-term commitment to conserve and care for the property - buildings, open land, woods, and marshes - for generations to come;
- ***The CDM team reflects the skills, diversity, and capacity to advance the Plan*** with a 20-person professional staff, dedicated volunteers, and a visionary Board guiding CDM into the future;
- ***A strong business model that provides the financial resources to achieve excellence and responsible growth*** through diverse contributed and earned income streams, including a \$5 million operating budget, a capital improvements fund, and a \$10 million endowment to support the operations of the new building.

VALUES

The Coastal Discovery Museum Board of Directors, staff, and volunteers value community, discovery, stewardship, and accountability.

Community

- Being relevant, engaging, participatory, and inclusive
- Welcoming diverse perspectives, viewpoints and ideas
- Building partnerships with other organizations
- Leading with a commitment to make a difference

Discovery

- Embracing the power of experiencing and exploring nature
- Revealing how each of us plays a role in preserving culture and the environment
- Using first-hand observations to facilitate dialogue with our audiences
- Revealing meaningful connections to influence the public we serve

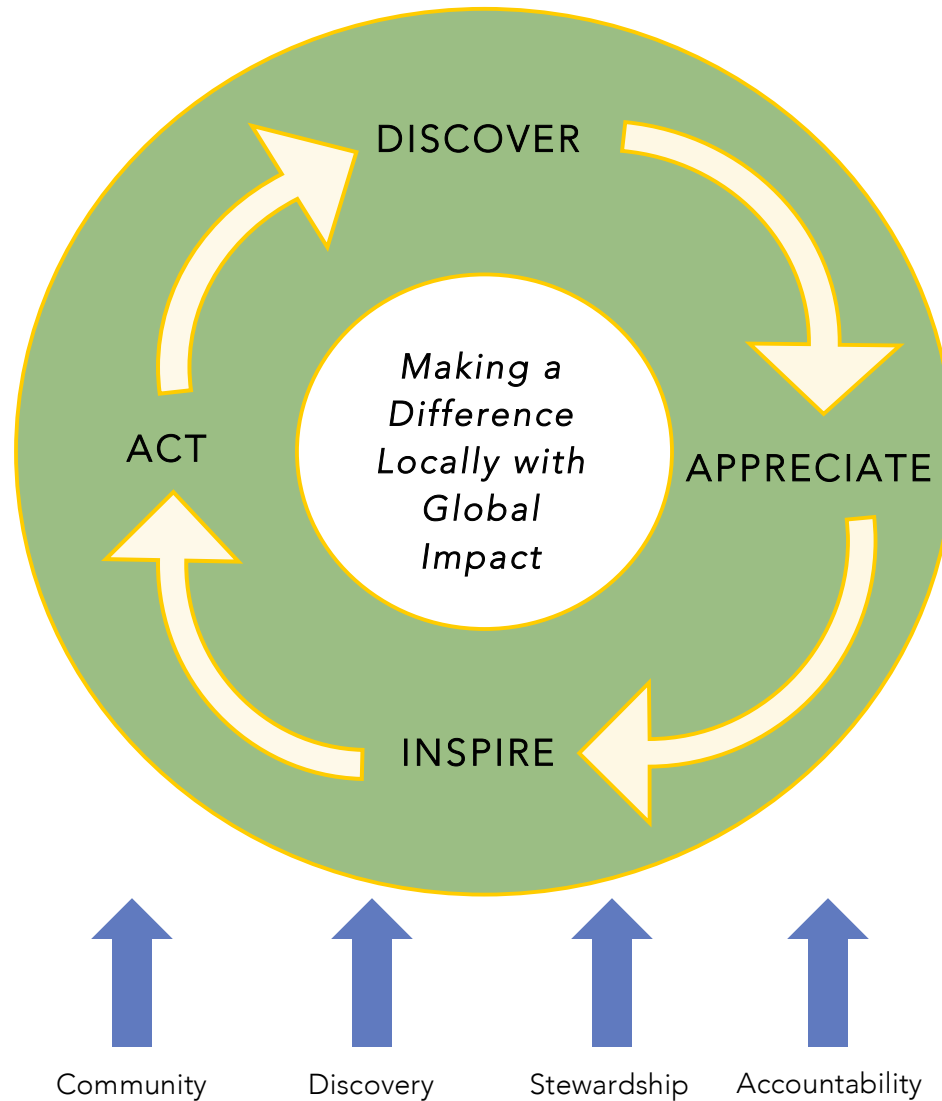
Stewardship

- Influencing people to care about the land, air, water, plants, and animals
- Preserving historical and contemporary local cultural and artistic traditions
- Protecting the beauty and character of the Honey Horn property
- Caring for our collections held in the public trust

Accountability

- Earning the trust of our community and visitors every day
- Listening with empathy and concern to better serve others
- Upholding ethical, legal, and museum standards of practice
- Ensuring responsible fiscal management

CDM ENGAGEMENT MATRIX



ORIENTING PRINCIPLES

The Board, staff and volunteers are guided by these core principles.

- We lead by example, carefully weighing the impact of our decisions and actions.
- We work with the community and connect with our visitors for enduring results.
- We believe that relationships are essential for our success.
- We grow responsibly while upholding our commitment to preserve the Lowcountry.

OUTCOME MEASUREMENTS

Outcome measurements are either quantitative or qualitative, and help measure progress advancing the goals of this Strategic Plan. It is important to note that 2017 will be dedicated to building the baseline of data in order to compare one year to the next. The outcome measurements should be reviewed once a year to determine progress, identify whether an outcome measurement requires adjustment, or reveal that new outcome measurements are needed.

Outcome measurement 1: Visibility of CDM has increased by 5% each year.

(Measured by website hits, tracking responses on social media like Trip Advisor, review of visitor feedback online and onsite, sign in sheets, etc.)

Outcome measurement 2: Awareness of and participation with CDM has increased by 5% each year onsite, off-site, and online, reflecting a broader geographic representation, and diversity of visitors overall.

(Measured by attendance records, website hits, Facebook likes and shares, comment books, program attendance records, etc.)

Outcome measurement 3: Visitor satisfaction with CDM has increased by 5%, or one ranking position each year.

(Measured by visitor satisfaction surveys, or ranking position in Yelp, Trip Advisor, and Facebook)

Outcome measurement 4: The profile of visitors and participants better reflects the diversity of the Hilton Head Island community and the Lowcountry.

(Measured by number of ongoing community centered programs, educational programs to Title 1 schools, invitations to present at community events, visitor and website surveys, etc.)

Outcome measurement 5: An increase in environmental advocacy is the result of programs, visits, and engagement.

(Measured by recording individual stories of how CDM inspires others, responses and reports of advocacy participation, tracking environmental advocacy on website and social media, track all major advocacy initiatives and report annually.)

Outcome measurement 6: The effective and holistic use of the entire Honey Horn property has been improved incrementally each year.

(Measured by reports by the Facilities Committee, Facilities + Grounds Manager, + CEO assessment.)

Outcome measurement 7: Capital improvement projects have been successfully completed each year as outlined in the Master Plan.

(Measured by Capital Projects Committee, Facilities + Grounds Manager + CEO assessment.)

Outcome measurement 8: The ongoing maintenance and enhancement of the Honey Horn Property has achieved high standards of care with marked improvement annually.

(Measured by reports by Facilities + Grounds Manager + CEO assessment.)

Outcome measurement 9: 100% of Board members fulfill annual Board expectations including attendance at meetings, participation on Board committees, annual contribution to the general operating budget, stretch gifts for capital campaigns, etc.

(Measured by annual Board assessment processes, and donor records for Board members.)

Outcome measurement 10: Increase in staff has occurred in line with priorities and in alignment with financial capacity.

(Measured by assessment of CEO, and number of staff.)

Outcome measurement 11: Staff and volunteer satisfaction has increased incrementally.

(Measured by feedback from annual staff performance reviews, annual confidential staff feedback and volunteer surveys.)

Outcome measurement 12: The overall number of donors and potential donors has increased by 10% each year and the total amount of contributed donations overall has grown incrementally.

(Measured by lead indicator of the number of email addresses we collect, as well as development tracking records, #s of donors and amounts donated, and comparisons of numbers year-to-year for membership, individual donors, annual appeal, grants, corporate support, government support, etc.)

Outcome measurement 13: The Museum operates within a Board-approved budget growing in a sustainable way.

(Measured by balance sheet, and Board and CEO assessment of financial performance each year.)

Outcome measurement 14: Earned revenue programs stay true to the mission and operate with a profitable margin.

(Measured by Return on Investment (ROI) and assessment of mission alignment for all earned revenue programs.)

Outcome measurement 15: CDM is able to grow the endowment corpus incrementally each year. *

(Measured by gifts to the endowment, and comparison of corpus year-to-year with investment reports.)

** Note this outcome measurement will be used once an endowment has been established. The goal is to have an endowment in place by 2021.*

STRATEGIC GOALS

GOAL 1: BROADEN CDM VISIBILITY

As CDM looks to the future, the Board and staff plan to enhance the Museum's brand and identity to help convey the many ways the public can participate and engage with CDM. During the goal work sessions, some pointed out that the identity of CDM is sometimes believed to be only for families or only about the environment. In fact, CDM is for visitors of all ages, and its scope of focus includes culture, history and art as it relates to the environment. While CDM does serve many tourists and a percentage of local residents, it is clear strategies are needed to reach young families, teens, and young adults, and engage Native Islanders and Latinos in meaningful ways

With limited dollars currently dedicated to promotional efforts plus the ubiquitous reality of technology and social media, there is a commitment to invest and expand staff dedicated to marketing, and to dramatically expand digital strategies for the broadest impact. Board and staff alike acknowledge that enhancing the use of the website, and participating in various social media platforms is key to capturing a wider audience. Further, CDM intends to conduct market research to inform decision-making, and to better understand how people find out about CDM and decide to visit or participate online.

CDM has experienced success with community partnerships. The ongoing support of the Mitchelville Preservation Project strengthens local relationships with the Gullah and African American communities in ways that meet their goals. The Smithsonian Affiliate status is another ideal opportunity to increase visibility with the public. These are just two examples of how CDM works with other organizations to enrich cultural life on Hilton Head Island.

GOAL 1: BROADEN CDM VISIBILITY

PRIORITIES	PROCESS STAGE	ADDITIONAL RESOURCES REQUIRED	TIME- TABLE	ACCOUNTABILITY
MARKETING PLAN + STRATEGY				
SHORT-TERM MARKETING STRATEGY				
1.1 Assess brand, collateral, messaging, + digital strategies in alignment with mission, vision and future direction and identify: <ul style="list-style-type: none"> • What are the audiences the marketing efforts are directed to • Key messaging elements • Identify where used • What needs adjustment 	Assess	TBD	2017	CEO + VP of Marketing + Development
1.2 Layout short-term Marketing Plan with timeline	Plan	TBD	2016 + annually	CEO + VP of Marketing + Development
1.3 Implement short-term marketing strategies	Implement	TBD	2016 + ongoing	CEO + VP of Marketing + Development
1.4 Clarify marketing approval process	Policy		2017	CEO + VP of Marketing + Development
1.5 Implement approval process	Implement	TBD	2017	CEO + VP of Marketing + Development

PRIORITIES	PROCESS STAGE	ADDITIONAL RESOURCES REQUIRED	TIME-TABLE	ACCOUNTABILITY
LONG-TERM MARKETING STRATEGY 1.6 Lay out Marketing Plan to support + prioritize work forward (Keep eye on short-term vs. long-term investment): <ul style="list-style-type: none"> • Leverage assets such as Smithsonian Affiliate status • Align methods to match audience • Weigh balance of collateral versus digital • Leverage what already doing and feature in range of sites • Look for exposure in different ways 	Plan	TBD	2018	CEO, VP of Marketing + Development, Select Board Members
1.7 Redesign look + feel of marketing materials (Collateral + digital)	Implement	TBD	2018	CEO + Staff
1.8 Implement long-term marketing strategies	Implement	TBD	2018 + ongoing	CEO + Staff
1.9 Build in annual review of effectiveness of marketing efforts, and adjust accordingly	Evaluate		2019 + annually	CEO + Staff
PARTICIPATION IN CDM PROMOTION 1.10 Provide tools, messaging, + strategies to support Board, staff, members, + volunteers in their effort to promote CDM: <ul style="list-style-type: none"> • Disseminate updates to keep informed (See Goal 5)	Implement	TBD	Ongoing	Board + Staff
DIGITAL STRATEGIES				
SHORT-TERM DIGITAL STRATEGIES 1.11 Assess current digital strategies in use at CDM <ul style="list-style-type: none"> • Website • Social media 	Assess	Add Digital Communications Coordinator (salary TBD)	2018	VP of Programs + VP of Marketing + Development

PRIORITIES	PROCESS STAGE	ADDITIONAL RESOURCES REQUIRED	TIME- TABLE	ACCOUNTABILITY
1.12 Determine short-term ways to improve impact <ul style="list-style-type: none"> • Website • Social Media 	Plan		2018	VP of Programs + VP of Marketing + Development
WEBSITE 1.13 Assess effectiveness of website in light of new Strategic Plan	Assess		2018	CEO, VP of Programs + VP of Marketing + Development
1.14 Upgrade on-line reservation system	Implement	TBD	2018	VP of Program + VP of Marketing + Development
1.15 Invest in website upgrades and improvements <ul style="list-style-type: none"> • Keep website updated + current • Add staff to support website + social media • Update daily or high frequency to keep CDM visibility current 	Implement	TBD	Ongoing	VP of Program + VP of Marketing + Development
1.16 Evaluate website cyclically for significant overhauls or upgrades to remain current and address user feedback	Evaluate		Annually	VP of Program + VP of Marketing + Development
LONG-TERM DIGITAL STRATEGIES 1.17 Develop a Digital Strategy Plan that addresses: <ul style="list-style-type: none"> • Technology • Website • Social media • Staff training • In-house positions + expertise • Equipment + programs 	Plan	TBD	2018 - 2019	VP of Programs + VP of Marketing + Development

PRIORITIES		PROCESS STAGE	ADDITIONAL RESOURCES REQUIRED	TIME- TABLE	ACCOUNTABILITY
1.17.1	Consider creating a visitor app	Assess	TBD	TBD	CEO
1.18	Develop policy and systems to support digital investment	Policy		2018 - 2019	VP of Programs + VP of Marketing + Development
1.19	Implement digital strategy as resources permit tied to: <ul style="list-style-type: none"> • Equipment, programs, and hardware • Training and alignment of use to meet needs • Diverse vehicles of communication 	Implement	TBD	2018 - 2019 + ongoing	VP of Programs + VP of Marketing + Development
1.20	Fold in an annual review of digital systems + strategies for determining upgrades +/- improvements	Evaluate	TBD	2019 + annually	VP of Programs + VP of Marketing + Development
PROGRAM ASSESSMENT					
IMPLICATIONS OF PROGRAM ASSESSMENT					
1.21	Fold in program assessment results into audience strategies: <ul style="list-style-type: none"> • Incorporate assessment of financial impact of programs including: <ul style="list-style-type: none"> ○ Program fees + revenue ○ Direct + indirect costs ○ Human resources required (See Goal 2)	Plan		2016	CEO + Staff
1.21.1	Outline rollout of changes as identified from the program assessment results	Implement		2016 + ongoing	CEO + Staff

<i>PRIORITIES</i>	<i>PROCESS STAGE</i>	<i>ADDITIONAL RESOURCES REQUIRED</i>	<i>TIME- TABLE</i>	<i>ACCOUNTABILITY</i>
OUTSIDE GROUP USE OF CDM 1.22 Assess events sponsored by other groups for alignment with mission, vision and audience priorities: <ul style="list-style-type: none"> Assess criteria for evaluation, \$\$, impact, appropriate fit 	Assess		2016	VP of Marketing + Development
1.23 Create policy to support new approach to outside group use	Policy		2107	VP of Marketing + Development
1.24 Implement new policy and procedures	Implement		2017	VP of Marketing + Development
1.25 Evaluate periodically to ensure right strategy for diverse outside group use.	Evaluate		2017	VP of Marketing + Development

AUDIENCE PRIORITIES

AUDIENCE MIX + STRATEGIES					
1.26	Assess current audience engagement + priorities referencing school-children, parents and young children, grandparents and grandchildren, and adult audiences that fall into these groupings: <ul style="list-style-type: none">Hilton Head Communities<ul style="list-style-type: none">Native IslandersEthnic Specific CommunitiesGated CommunitiesTime-share communitiesGeographic Locations<ul style="list-style-type: none">Off-Island LocalsEast Coast Corridor VisitorsMidwest VisitorsRest of USCanadiansOther international visitors	Assess	TBD	2017	CEO, VP of Programs, VP of Marketing + Development, + Program staff
1.27	Develop strategy and priorities for audience engagement (tourists + locals): <ul style="list-style-type: none">Current audiences to retainCurrent audiences to expandNew audiences to engagePrioritize + link to public offerings and services	Plan	TBD	2017 + ongoing	CEO, VP of Programs, VP of Marketing + Development, + Program staff
1.28	Address these specific audiences and their unique needs: <ul style="list-style-type: none">Island Residents (Gated communities, subgroups)Native IslandersAnnual Island Visitors	Plan		2017 + ongoing	VP of Marketing + Development + VP of Programs
1.28.1	Keep an eye towards Mitchelville Project	Plan		Ongoing	CEO

1.29	Develop methods for tracking different audience types to inform decisions and marketing efforts	Plan	TBD	2017 + ongoing	VP of Marketing + Development
1.30	Collect data from existing sources to amend internal tracking	Implement		Ongoing	VP of Marketing + Development
AUDIENCE DEVELOPMENT PLAN					
AUDIENCE CULTIVATION					
1.31	Develop an Audience Development Plan referring to program assessment + audience strategies <ul style="list-style-type: none"> • Short-term • Long-term 	Plan		2017 - 2018	VP of Marketing + Development + VP of Programs
1.32	Consider staff implications for program development	Plan		Ongoing	CEO
1.33	Engage in select community conversations to help inform decisions and areas of interests with specific audiences	Assess		2018	CEO + Staff
1.34	Create advisory groups to build ongoing relationships <ul style="list-style-type: none"> • Native Islander 	Implement		TBD	CEO + Staff
1.35	Incorporate partnerships or strategies to increase visitors	Implement		Ongoing	CEO + Staff
1.36	Review results and adjust as needed	Evaluate		Annually	CEO + Staff

GOAL 2: INCREASE PUBLIC ENGAGEMENT

Once the Coastal Discovery Museum moved to its current location on the 68-acre Honey Horn Property in 2007, many more possibilities opened for public engagement. Some of the opportunities include the natural habitat as a classroom, historic buildings housing exhibits, and a pathway that allows visitors to experience the diversity of the property. Today, there is a robust array of programs offered year-round from live animal demonstrations to the butterfly habitat to school tours. Public engagement varies between the seasons due to tourism trends typically heaviest during the summer, and local resident participation in the late fall and winter. For that reason, programs during the summer are largely geared to families and visiting tourists, while the other seasons feature more adult and family programs aimed at local residents. The modest staff is to be commended for their ongoing commitment to delivering such an ambitious schedule of programs.

At the core of this Plan is a commitment to provide ways for the public to embrace their role as stewards of the environment, culture, history and art of the Lowcountry. The goal is for visitors to take action whether on Hilton Head Island or at home in their communities off the Island. To support this target, the staff undertook a rigorous program assessment process to determine whether the current public offerings served the full range of audiences desired, aligned with the new mission and vision, and were cost effective. As a result of this assessment, the mix of programs was adjusted, some programs were modified to better align with the mission, and new programs are under development to achieve a full complement of offerings.

One priority in this goal is to reinstall the exhibitions in the Discovery House and upgrade interpretation throughout the site in order to feature relevant topics and interactive elements, and to meet the expectations of today's discerning public. As part of the onsite and online experience, incorporating new digital strategies will be essential in order to serve onsite visitors, and build an online community of environmental advocates, a visionary aspiration of this Plan.

GOAL 2: INCREASE PUBLIC ENGAGEMENT

PRIORITIES	PROCESS STAGE	ADDITIONAL RESOURCES REQUIRED	TIME- TABLE	ACCOUNTABILITY
PROGRAM ASSESSMENT				
PROGRAM ALIGNMENT 2.1 Complete program assessment + determine programs to: <ul style="list-style-type: none"> • Continue as is • Modify • Discontinue • Consolidate • Place on hold for review at a later date 	Assess		2016	CEO, VP of Programs, VP of Marketing + Development, Curator of Education, Manager of Natural History
2.1.1 Use mission matrix to achieve right balance + interconnectedness with programming, exhibitions, + digital strategies <ul style="list-style-type: none"> • Identify new areas for development to achieve greater balance in reaching new target audiences 	Plan		2016 + ongoing	CEO + Staff
2.2 Build clear policy and processes to support the review of existing programs and proposed programs <ul style="list-style-type: none"> • Use program assessment tool • Refer to decision-making criteria and processes 	Policy		2018	CEO + Staff
2.3 Outline timeline for rolling out changes as indicated in program assessment <ul style="list-style-type: none"> • Review and provide updates with Board and appropriate Committees (See Goal 1)	Plan		2017	VP of Programs, VP of Marketing + Development, Education Staff

PRIORITIES		PROCESS STAGE	ADDITIONAL RESOURCES REQUIRED	TIME-TABLE	ACCOUNTABILITY
2.4	Rollout program implementation and adjustments as defined in results of program assessment	Implement		2017 - 2018	VP of Programs, VP of Marketing + Development, Education Staff
2.5	Incorporate ongoing evaluations to support changes as needed	Evaluate		Ongoing	VP of Programs, VP of Marketing + Development, Education Staff
INTERPRETIVE PLAN					
INTERPRETIVE PLAN					
2.6	Build Interpretive Plan using mission matrix and results from program assessment to create programming with holistic view folding in: <ul style="list-style-type: none"> • Use of entire property, buildings, and salt marsh • Use of digital strategies • Diversity of audience priorities • Formula for public programs that reflect Strategic Plan • Appropriate methods in alignment with mission + vision • Timeline for implementation • Modification to tools, as appropriate 	Plan	IMLS grant support required for Interpretive Plan Consultant + Professional Evaluator	2017-2019 (2017 apply for grant)	CEO + Staff
2.8	Incorporate recommendations and strategies outlined in the Interpretive Plan, as resources permit	Implement	TBD	2019 + ongoing	CEO + Staff

PRIORITIES		PROCESS STAGE	ADDITIONAL RESOURCES REQUIRED	TIME- TABLE	ACCOUNTABILITY
2.9	Fold in ongoing evaluation techniques for review of changes over time	Evaluate		Ongoing	VP of Programs, Education staff
MARKETING PLAN + PR CAMPAIGN					
TALKING POINTS					
2.10	Tie roll out of changes to PR strategy for messaging to public (See Goal 1)	Plan		Ongoing	CEO, VP of Marketing + Development
2.11	Implement talking points to align with mission, vision, values, + programs in support of PR campaign <ul style="list-style-type: none"> Disseminate to Board, staff + volunteers (See Goal 1)	Implement		Ongoing	CEO, Board, Staff, Volunteers
PUBLIC ENGAGEMENT					
PUBLIC ACCESS + PARTICIPATION					
2.12	Assess opportunities for incorporating take-away messages for visitors and participants that encourage action + personal responsibility	Assess		2017 + ongoing	CEO, VP of Programs, VP of Marketing + Development, Curator of Education, Manager of Natural History
2.13	Capitalize on new Discovery Lab <ul style="list-style-type: none"> Feature throughout PR efforts to generate public interest 	Implement		2017 + ongoing	CEO, Board and Staff
2.14	Create take-aways for action for visitors	Plan		2017 + ongoing	VP of Programs, VP of Marketing + Development

PRIORITIES		PROCESS STAGE	ADDITIONAL RESOURCES REQUIRED	TIME- TABLE	ACCOUNTABILITY
2.15	Provide “cliff notes” for the Lowcountry + clarify where content is featured: <ul style="list-style-type: none"> • Website • Onsite • Online • Links • Social media 	Implement		2017 + ongoing	VP of Programs, Curator of Education, Manager of Natural History
VISITOR ENGAGEMENT + FEEDBACK					
2.16	Assess current means for gaining feedback from visitors and program participants: <ul style="list-style-type: none"> • List all ways that feedback currently occurs • Identity the types of feedback that would be helpful for planning • Reference standards in the field of evaluation and visitor studies 	Assess		2017 - 2018	VP of Programs, VP of Marketing + Development
2.17	Develop strategies for visitor and participant feedback <ul style="list-style-type: none"> • Diverse methods from evaluation to talk back boards to digital strategies • Realistic management of implementing and collecting • Identify the process for using and incorporating findings • Ability to revise and hone strategies 	Plan	\$10K as part of IMLS grant	2018 - 2019	CEO
2.18	Roll out strategies for visitors’ + program participants’ feedback with eye toward priorities, feasibility, and staff capacity	Implement	TBD	2018 - 2019	VP of Programs
2.19	Create appropriate policies for public feedback	Policy		2018	CEO

PRIORITIES	PROCESS STAGE	ADDITIONAL RESOURCES REQUIRED	TIME- TABLE	ACCOUNTABILITY
EXHIBIT MODIFICATION				
EXHIBITION STRATEGIES 2.20 Determine strategies to add to permanent and temporary exhibitions to make more direct connection with mission + vision: <ul style="list-style-type: none"> • Introductory panel • Labels • Short-term • Long-term 	Assess	\$150K IMLS Grant	2018 - 2019	CEO
2.21 Update the general introductory panel to CDM	Implement	\$1,500	2017	CEO
2.22 Prepare for implementation of: <ul style="list-style-type: none"> • Exhibition changes + reinstallation expenses • Exhibition installation tied to new building (See Goal 3)	Plan	TBD	TBD	CEO

POTENTIAL PROGRAM IDEAS

IDEAS FOR CONSIDERATION

2.23 Reference these ideas from the planning process:

- Enhance + capitalize on Gullah Tours
- Engage public in data collecting through Citizen Science
- Select partners for creating + producing programs
- Develop strategy to collect stories about the Lowcountry
- Explore a theme-based festival that CDM develops + hosts (i.e. butterfly festival)
- Offer programs for older students such as clubs for 12-to-14 year olds

Assess

TBD

Ongoing

CEO, VP of Programs,
VP of Marketing +
Development, Curator
of Education,
Manager of Natural
History

GOAL 3: ADVANCE EXEMPLARY STEWARDSHIP

Stewardship at CDM encapsulates the care and preservation of:

- The unique beauty of 68-acre Honey Horn open spaces, and all of the living specimens including plants, animals, and the marshland habitat;
- The historic and contemporary buildings located throughout the property from the new Laboratory to the historic horse barn to the Discovery House; and,
- The collections under the care of CDM including historic, cultural, natural history specimens, and art.

Stewardship, considered one of the primary responsibilities of the Board and staff, requires ongoing upkeep and maintenance including capital improvements such as roof replacement, cooling systems, and road repairs. Although the Town provides critical support toward these efforts each year, the envisioned future for CDM will require increasing the resources needed on an annual basis. Board and staff recognize the need to address deferred maintenance projects and attain the highest-quality maintenance and care. The added benefit of extraordinary stewardship is the enhanced visitor experience. As one staff member said, “CDM should lead by example.” Given that CDM aims to inspire stewardship in others, it follows that CDM must demonstrate exemplary stewardship as an institution.

Collections have historically not been an area of focus. However, it was agreed that it was time to determine the role of CDM collections, outline future collecting priorities, and take steps to meet accepted, museum standards for collection care.

Undertaking a thoughtful and holistic master planning effort was identified as essential to achieve an integrated vision for the full property. The centerpiece will be a new state-of-the-art museum building at the entrance to the Honey Horn property to welcome visitors to CDM, house exhibitions, and provide an orientation to the Lowcountry. It is not surprising that this goal, in particular, is projected to take well over a decade to complete due to upcoming master planning, fundraising for capital projects, and the completion of the new building and other projects across the property.

GOAL 3: ADVANCE EXEMPLARY STEWARDSHIP

PRIORITIES	PROCESS STAGE	ADDITIONAL RESOURCES REQUIRED	TIME-TABLE	ACCOUNTABILITY
MASTER PLANNING				
PLANNING TO PLAN 3.1 Lay out strategy and scope of work for undertaking two master planning efforts that taking into account, (1) a campus-wide effort, and (2) new visitor building incorporating: <ul style="list-style-type: none"> • Institutional priorities • Stakeholder priorities • Financial requirements • Expertise needed • Overall timing of project and correlating phases 	Plan		2018	Facilities Committee, Education Committee, CEO, Facilities Manager
MASTER PLAN 3.2 Assess building and landscape needs to align and advance new mission, vision, priorities, and Interpretive Plan <ul style="list-style-type: none"> • Include all existing buildings, public access areas, and range of property elements (entrance, parking, open space, outdoor education spaces, coastline, etc.) (See Goal 2)	Assess	TBD	2019	Facilities Committee, Education Committee, CEO, Facilities Manager

3.3	Build a Conceptual Program Plan that addresses: <ul style="list-style-type: none"> • Interpretive needs • Economic requirements for capital dollars to undertake • Financial impact to general operating budget over time including potential of new earned income + contributed sources • Sustainability issues over time • Community engagement • Priorities 	Plan	TBD	2019	Facilities Committee, CEO
3.4	Undertake a Feasibility Study to determine ability to raise the necessary funds for specific project(s) (See Goal 5)	Assess	TBD	2021	Development Committee, CEO
3.5	Create a Master Plan for the entire property including land + buildings incorporating: <ul style="list-style-type: none"> • Plans for all areas • Costs requirements • Phases and timing for implementation 	Plan	\$150K - \$250K Prime Lead, Museum + Interpretive Experts, Architects, Civil Engineers, Land Surveyors, Archaeologist, Environmental Specialist, Landscape Des.	2022	Facilities Committee, CEO, Facilities Manager
3.6	Launch special capital projects (\$100K or less)	Implement	TBD	2023	Facilities Committee, CEO, Facilities Manager

NEW BUILDING

STATE-OF-THE-ART MUSEUM BUILDING				
3.7 Refer to conceptual Master Plan	Assess	TBD	2022	Facilities Committee, CEO
3.8 Plan + design new state-of-the art building near entrance to CDM that features: <ul style="list-style-type: none"> Exhibition space Orientation center Public spaces for gatherings, lectures, events Collection storage Museum quality operational systems such as loading dock, HVAC, etc. 	Plan	TBD	2026 - 2027	Facilities Committee, CEO
3.8.1 Support plan for new building with details addressing: <ul style="list-style-type: none"> Interpretive needs Economic requirements for capital dollars to undertake + upkeep Financial impact to general operating budget over time including potential of new earned income + contributed sources Sustainability issues over time 	Plan	TBD	2026 - 2027	Facilities Committee, CEO
3.9 Include new Museum in Feasibility Study for Capital Campaign (See Goal 5)	Assess	TBD	2026	Development Committee, CEO
3.10 Launch Capital Campaign (See Goal 5)			2025 - 2027	Development Committee, CEO, Capital Campaign
3.11 Undertake and complete construction of new building	Implement	TBD	TBD	Facilities Committee, CEO

PROPERTY

INTERPRETIVE PLAN					
3.12	Reference Interpretive Plan for entire site identifying: <ul style="list-style-type: none">• Areas for upgrade or development throughout the property• Priority of projects (See Goal 2)	Assess		2019	CEO, Senior Staff
3.13	Create plan for interpretive trail highlighting qualities + characteristics of the land, its history, and living specimens	Plan	TBD	2017	CEO, , Facilities Manager, VP of Programs, Curator of Education, Manager of Natural History
3.14	Install interpretive trail	Implement	TBD	2018	Facilities Manager, VP of Programs
3.15	Outline benchmarks for review and upgrades for trail	Evaluates	TBD	2019 + annually	Facilities Manager, VP of Programs

PROPERTY MANAGEMENT

PROPERTY MANAGEMENT PLAN					
3.16	Assess current property management strategies <ul style="list-style-type: none">Identify cycles of upgrades	Assess	TBD	2017	CEO, Facilities Manager, Facilities Committee
3.17	Conduct inventory of specimens on property: <ul style="list-style-type: none">PlantsAnimalsBuildingsArcheological sites	Assess	TBD	2017	VP of Programs
3.18	Build interactive database for ongoing tracking of diverse elements of property	Implement		2017	CEO, Facilities Manager, VP of Programs

3.19	Establish Property Management and Capital Improvements Plan with (Refer to Master Plan): <ul style="list-style-type: none"> Property management goals Projects and timelines Capital projects Financial implications 	Plan		2017	CEO, Facilities Manager, Facilities Committee
3.20	Establish Property Management and Capital Improvements Policies	Policy		2017	CEO, Facilities Manager, Facilities Committee
3.21	Implement projects as identified in the Property Management and Capital Improvements Plan	Implement	TBD	2017	CEO, Facilities Manager, Facilities Committee
DISASTER MANAGEMENT PLAN					
DISASTER PLANNING					
3.22	Develop Disaster Management Plan	Plan		2017-2018	CEO + Board
3.23	Adopt Disaster Management Policy	Policy		2017-2018	CEO + Board
3.24	Provide periodic training with Board, Staff, + Volunteers	Implements		Annually	CEO
ONGOING FACILITY MAINTENANCE					
FACILITIES + OPERATIONS					
3.25	Assess internal operational needs for all buildings addressing: <ul style="list-style-type: none"> Security Technology and equipment needs Staff office requirements HVAC Facility maintenance + needs Space needs 	Assess		2018	CEO, Facilities Manager, Facilities Committee

3.26	Outline Management Policy and cycle of maintenance <ul style="list-style-type: none"> Housekeeping Policy 	Policy		2018	CEO, Facilities Manager, Facilities Committee
3.27	Upgrade security systems throughout buildings + property	Implement	TBD	TBD	CEO, Facilities Manager, Facilities Committee
COLLECTIONS					
ARTIFACT COLLECTION					
3.28	Undertake AAM programs CAP + MAP regarding collections	Assess	Grant for CAP + MAP Programs	2019 - 2020	CEO
3.29	Decide future around artifact collections: <ul style="list-style-type: none"> Collect or don't collect Deaccession or give to another nonprofit Identify priorities for care 	Plan		2019 - 2020	CEO, Board
3.30	Build room with proper storage for collections in existing building	Implement	TBD	TBD	CEO
3.31	Develop Collection Management Policy	Policy		2017	CEO, Board
3.32	Develop Collection Plan	Plan		2017	CEO, Board
3.33	Conduct inventory + document collections with database/digital formats for: <ul style="list-style-type: none"> Collections Archives Photographs 	Implement	TBD	2019 - 2020	CEO

LIVING COLLECTIONS 3.34 Define + clarify standards of care for range of living collections + relationship to the Lowcountry environment: <ul style="list-style-type: none"> Plants + trees (Indigenous plants/trees plus camellias, magnolias) Animals (Horses, alligators, snakes, butterflies, horse shoe crabs, etc.) Living organism environments (Bat house, bird house, bee hive, etc.) 	Plan	TBD	2017	Curator of Education
3.35 Develop Living Collection Management Policy	Policy		2017	Curator of Education
3.36 Implement standards of care	Implement	TBD	2017 – 2018	Curator of Education

GOAL 4: BUILD ORGANIZATION OF THE FUTURE

CDM has grown significantly since it's founding in 1985. Today, more than 30 years later, there is a dedicated Board of Directors, a seasoned, museum professional as CEO, a committed staff of 10, and a talented corps of volunteers. Now located on an expansive 68-acre property, the output of the staff is remarkable given the size of the institution. During the planning, there were open conversations about the need to grow capacity in order to achieve the aspirations laid out in this Plan.

The Board of Directors has begun conversations about how to grow its governance capacity on behalf of the Museum. Restructuring Board Committees, diversifying Board membership, and clarifying the role of Board members in fundraising are efforts underway. Board leadership will be particularly key to mount successful annual appeals, special capital campaigns, as well as help build the donor base for the Museum.

The current staff exemplifies the highest level of dedication and achieves the output of a staff twice its size. This "can do" attitude coupled with inherent talents has brought the Museum to where it is today, but simply put, more staff is needed to implement the priorities in this Plan. A full-time development staff member and a social media coordinator, to name two, are needed to complement the talents of the existing staff. The projections for staff growth are to add one or two staff members a year, as prudent and possible, anticipating a staff of 20 several years from now. The growth of the staff will occur as finances permit in support of upholding responsible growth.

Every museum needs a volunteer corps to fulfill its mission and CDM is no different. Many programs are implemented thanks to exceptional volunteers giving their time and working with the public. In addition to helping with public programs, some volunteers help on the property, and others help at the registration desk. During the assessment process, it became clear that the volunteer program was prime to mature with ongoing support, training, and professional development, especially key with the new mission and vision.

Last, the Board agreed to work toward achieving accreditation from the American Alliance of Museums (AAM) in the future. To that end, many of the requirements for accreditation are identified for completion in this Plan.

GOAL 4: BUILD ORGANIZATION OF THE FUTURE

PRIORITIES	PROCESS STAGE	ADDITIONAL RESOURCES REQUIRED	TIME-TABLE	ACCOUNTABILITY
AAM ACCREDITATION				
AAM ACCREDITATION				
4.1 Undertake self-evaluation to determine areas for strengthening and documents required in preparation for applying for AAM Accreditation <ul style="list-style-type: none"> Fold in work of Strategic Plan 	Assess		2018	CEO, Board President, with support of staff + Board
4.2 Outline plan to prepare for undertaking AAM Accreditation <ul style="list-style-type: none"> Layout policies, supporting plans and document preparation with priorities to complete by year Review progress at annual retreat Coordinate Strategic Plan priorities with AAM Accreditation 	Plan		2018 – 2021	CEO + Board President
4.3 Apply for Accreditation	Implement	TBD	2022 - 2023	CEO + Board President
BOARD STANDARDS OF OPERATIONS				
BOARD POLICIES				
4.4 Develop a Code of Ethics	Implement		2017	Governance Committee + CEO
4.5 Define Rules of Engagement that include elements such as: <ul style="list-style-type: none"> Distinction between Board, CEO, + Staff roles + responsibilities Decision-making processes Board annual expectations Annual Board evaluation 	Policy		2017	Governance Committee + CEO

4.6	Adhere to CDM Bylaws + update as necessary	Policy		2017 + ongoing	Governance Committee + CEO
4.7	Review and keep Board policies up-to-date	Policy		Ongoing	Governance Committee + CEO
4.8	Create Board Manual + include: <ul style="list-style-type: none"> • Code of Ethics • Current Policies • Rules of Engagement • Annual meeting calendar / Board meetings / Committee meetings • List of Board + Staff members • Other CDM documents as appropriate 	Implement		2017	Governance Committee, Executive Committee + CEO
NEW + RETURNING BOARD MEMBER ORIENTATION					
4.9	Build-in annual review of Board operations	Implement		Annually	Governance Committee + CEO
4.10	Outline elements of Board orientation	Implement		2017 + ongoing	Governance Committee + CEO
4.11	Review Board orientation with every new Board member	Implement		2017 + ongoing	Governance Committee + CEO
4.12	Update Board Manual	Evaluate		Ongoing	Governance Committee + CEO
ANNUAL BOARD RETREAT					
4.13	Fold an annual retreat into Board calendar to: <ul style="list-style-type: none"> • Review Board evaluation • Assess progress on the Strategic Plan • Clarify Board priorities for the coming year 	Implement		2017	Board President + CEO

BOARD COMMITTEES

BOARD COMMITTEE ACTIVATION 4.14 Activate Executive Committee, Governance Committee, + Development Committee <ul style="list-style-type: none"> • Identify members • Clarify roles of each committee and relationship to full Board • Fold function of Nominating Committee into Governance Committee 	Implement		2016	Board President + CEO
4.15 Assess current Board committees, roles, responsibilities, and accountability for: <ul style="list-style-type: none"> • Finance Committee • Facilities Committee • Public Engagement Committee • Development Committee 	Assess		2017	Governance Committee
4.15.1 Clarify scope, roles + expectations of each committee <ul style="list-style-type: none"> • Tie into priorities and goals in Strategic Plan • Distinction between Board Committee and Staff responsibility • Timing and regularity of meetings • Reports to full Board • Identify the committees to continue <ul style="list-style-type: none"> ○ Standing (Ongoing, core committees) ○ Task Forces (Short-term) 	Plan		2017	Governance Committee + Executive Committee
4.16 Outline priorities and reporting expectations of all committees for upcoming year	Implement		2017 + annually	Governance Committee + CEO

4.17	Review Board Committees and Task Forces annually and determine: <ul style="list-style-type: none"> • Areas for refinement • Continue appropriate committees • Retire those no longer needed • Add new ones as needed • Be scrupulous about adding standing committees when a Task Force may be a better solution 	Evaluate		2018 + annually	Governance Committee
BOARD LEADERSHIP CULTIVATION					
RECRUITING + NOMINATING PROCEDURES		Assess		2017	Governance Committee + CEO
4.18	Assess current recruiting and nominating procedures <ul style="list-style-type: none"> • Identify ways to align with goals of Strategic Plan 				
4.19	Clarify long-term goals for Board composition addressing: <ul style="list-style-type: none"> • Diversity in skills, background, ethnicity, age, gender, geography, etc. • Expectations for successful participation as a Board member (to be included in recruitment process) 	Plan		2017	Governance Committee
4.20	Clarify expectations for each individual Board member tied to: <ul style="list-style-type: none"> • Individual Board Member giving • Support of institutional fundraising efforts • Stretch gifts for Capital Campaigns • Attendance at Board meetings • Participation on at least one Board committee • Ambassadorship on behalf of CDM at CDM events and in the community 	Policy		2017	Governance Committee
4.21	Adopt a Recruiting + Nominating Policy and Procedure	Policy		2017	Governance Committee
4.22	Revisit Recruiting + Nominating Procedures <ul style="list-style-type: none"> • Incorporate priorities for diversity + expectations 	Evaluate		2018 + Annually	Governance Committee

4.23	Appoint non-Board members to committees as way of engaging + assessing new leadership talent for CDM	Implement		Ongoing	Board President
BOARD PERFORMANCE ASSESSMENT					
BOARD SELF-EVALUATION		Plan		2017	Governance Committee
4.24	Create + incorporate Board self-evaluation based on fulfilling expectations + advancing the Strategic Plan: <ul style="list-style-type: none"> Individual self-evaluation Board self-evaluation 				
4.25	Adopt a policy in support of Board self-evaluation	Policy		2017	Governance Committee
4.26	Undertake individual and full Board evaluation process in advance of annual Board retreat <ul style="list-style-type: none"> Fold in results of evaluation into Board retreat activities 	Implement		2018	Governance Committee
4.27	Assess Board evaluation instruments for effectiveness and alignment	Evaluate		2018 + annually	Governance Committee
STAFFING PLAN + STRUCTURE					
STAFFING PLAN		Assess		2017	CEO + Executive Committee
4.28	Assess current staffing capacity and structure against priorities outlined in Strategic Plan <ul style="list-style-type: none"> Identify strengths and gaps in expertise 				

4.29	Develop Staffing Plan clarifying: <ul style="list-style-type: none"> • Scope of work for each staff member • Revised job titles + responsibilities, as needed • Timing strategy of hiring new staff • Pay levels plus benefits • Changes to staff structure including reporting 	Plan for Short-term + Long-term	TBD	2017	CEO + Executive Committee
4.29.1	Define financial implications of adding staff over time <ul style="list-style-type: none"> • Clarify timing and priorities of hires 	Plan		2017	Finance Committee + CEO
4.30	Hire staff in alignment with Staffing Plan priorities: <ul style="list-style-type: none"> • Leadership Team <ul style="list-style-type: none"> ○ Development Officer ○ Digital Communications Coordinator ○ Collections/exhibit + curatorial ○ Store Manager • Support Staff <ul style="list-style-type: none"> ○ Administration/Reservation Coordinator ○ Education support staff ○ Membership 	Implement	TBD Salaries + benefits Approx. \$100K increase per year	2017	CEO
CDM ORGANIZATIONAL CULTURE					
4.31	Assess current organizational culture <ul style="list-style-type: none"> • Identify strengths and opportunities for improvement 	Assess		2016	CEO + Staff
4.32	Define CDM organizational culture <ul style="list-style-type: none"> • Build in training as needed • Identify regular times to nurture culture • Link implementation to performance review 	Plan		2016	CEO + Staff
4.33	Create and use strategic decision-making tool			2016 + ongoing	CEO + Staff

4.34	Fold into Human Resource Policy	Policy		2017	CEO + Staff
4.35	Integrate tenets into daily operations	Implement		Ongoing	CEO + Staff
4.36	Assess organizational culture to ensure best practices <ul style="list-style-type: none"> Make changes as appropriate 	Evaluate		2017 + Annually	CEO
HR MANAGEMENT + POLICIES					
HUMAN RESOURCES MANAGEMENT		Assess		2017	CEO + Executive Committee
4.37	Assess current Human Resource policies and procedures <ul style="list-style-type: none"> Identify gaps Ensure legal requirements are addressed 				
4.38	Develop Human Resource Policy and Manual: <ul style="list-style-type: none"> Policies + practices Pay + benefits 	Policy		2017	CEO + Executive Committee
4.39	Develop and implement a CEO contract	Implement		2017	CEO + Executive Committee
VOLUNTEER MANAGEMENT					
VOLUNTEER PROGRAM SUPPORT		Assess		2017	Volunteer Coordinator
4.40	Assess scope of needs to support volunteer program now and over time				
4.41	Develop Volunteer Handbook addressing: <ul style="list-style-type: none"> Policies Expectations Training Evaluation 	Plan		2017	Volunteer Coordinator
4.42	Develop policies in support of volunteer program and in sync with CDM Human Resource Policy	Policy		2017 - 2018	Volunteer Coordinator

4.43	Provide training and orientation to volunteer handbook and policies	Implement		2017 - 2018	Volunteer Coordinator
4.44	Build relationships and organizational culture of volunteers	Implement		Ongoing	Board, CEO + Staff with Volunteer Corps
4.45	Evaluate volunteer program and supporting policies and documents	Evaluate		Annually	Volunteer Coordinator

GOAL 5: GROW FINANCIAL FOUNDATION

The vision outlined in this Plan is aspirational requiring new sources of income and revenue. The current operating budget is \$1.375 million. A third of that income comes from the Town, a significant and core arm of support for the Museum, another third is earned income, and the final third is from grants and donations. Due to strict financial prudence and planning, the Museum operates in the black, and at this time has no debt. There is a reserve fund that is set aside for discretionary use and for emergencies with an investment advisor providing guidance for the prudent management of those funds. There is no official endowment at this time although the Board and CEO have this as a goal to achieve in the next 5 years.

As outlined in all of the prior goals, growth in the operating budget and capital budgets will be required for this Plan to be realized. There is widespread agreement that a Development Plan is needed for a clear strategy for achieving fundraising goals. The Development Plan will outline strategies to increase membership, the annual appeal, foundation grants, corporate support, and government grants (as is in place with the Town). Building this fundraising foundation and strong donor base is essential for building readiness for the capital campaigns outlined in this Plan. Central to success with fundraising is the ongoing care of relationships with donors. In time, a planned giving program will be put in place.

Earned revenue is being assessed through the program assessment process for Return On Investment (ROI) and ways to improve the results. Three earned income areas identified to scrutinize are the Museum Store, the facility rental program, and public programs. While the Museum doesn't charge admission, it does receive almost \$120,000 annually in cash donations.

While the Museum is expected to suffer an adverse economic impact due to closure during the recovery operations after Hurricane Matthew, it has established a reserve fund that will carry it through a period of temporary closure. It is not anticipated that Matthew and subsequent events will significantly impact the long-term goals for financial growth.

The priorities in this goal will require considerable investment of time and effort for years to come. With a full-time development staff member in place, it will allow the CEO and Board members to help build new relationships and engage a broader base of donors.

GOAL 5: GROW FINANCIAL FOUNDATION

PRIORITIES		PROCESS STAGE	ADDITIONAL RESOURCES REQUIRED	TIME- TABLE	ACCOUNTABILITY
DEVELOPMENT PLAN					
FUNDRAISING GOALS + STRATEGIES					
5.1	Assess past and current development efforts addressing: <ul style="list-style-type: none"> • Areas and types of giving • History of giving by year • Donor base • Board participation in fundraising • Staff support • Records and internal systems 	Assess	TBD Development Consultant to shape internal systems	2017 - ongoing	Board, Development Committee, CEO, VP of Development
5.2	Create Development Plan with details for growth, giving opportunities, levels of giving, and strategies: <ul style="list-style-type: none"> • Annual appeal • Annual individual Board giving • Individuals • Grants/Foundations • Corporate • Membership 	Plan	\$20K – \$40K Outside expertise	2019	Board, Development Committee + CEO
5.2.1	Assess + upgrade membership levels	Assess		2017 - 2018	Board, Development Committee + CEO
5.3	Develop policies in support of Development Plan such as: <ul style="list-style-type: none"> • Board giving + participation • Gift acknowledgement • Donor relations • Reporting and documenting, etc. 	Policy		2017 - 2018	Board, Development Committee + CEO

5.4	Assess current collateral tied to Development Plan	Assess		2017 + annually	CEO + Development Committee
5.4.1	Create new collateral to support Development Plan such as: fact sheet(s), PowerPoint(s), case statement(s), + support efforts	Implement		2017 + ongoing	CEO + Development Committee
5.5	Expand annual giving campaign + specific fundraising strategies tied to annual goals	Implement		2016 + annually	Board, Development Committee + CEO
5.6	Outline roles and responsibilities of Board and staff for fundraising (See Goal 4)	Policy		2017 + ongoing	Governance Committee
5.6.1	Implement roles for ongoing fundraising efforts	Implement		2017 (in sync with Dev. Plan)	Governance Committee
5.6.2	Clarify individual Board giving expectations and participation in fundraising <ul style="list-style-type: none"> Achieve 100% Board giving (See Goal 4)	Policy		2016 - 2017	Governance Committee
5.7	Evaluate progress on Development Plan each year <ul style="list-style-type: none"> Identify areas of success and areas for improvement <ul style="list-style-type: none"> Adjust Development Plan accordingly 	Evaluate		Annually	Board, Development Committee + CEO

ENDOWMENT + CAPITAL CAMPAIGNS					
LEGACY GIVING/ENDOWMENT		Plan		2019	Board, Development Committee + CEO
5.8	Develop strategy for: <ul style="list-style-type: none">Legacy giftsPlanned GivingEndowment(s)				
5.9	Develop supporting policies as appropriate for use and management of bequests, endowments, etc.	Policy		2019	Board, Development Committee + CEO
5.10	Implement campaigns and fundraising strategies for projects at \$100K			2018 + ongoing	Board, Development Committee + CEO
CAPITAL + ENDOWMENT CAMPAIGNS		Plan	TBD for Capital Campaign consultants	2023	Board, Development Committee + CEO
5.11	Integrate and plan Capital Campaigns tied to interpretive planning, master planning, and other efforts relating to property, building, and campus improvements (Goal 3)				
5.11.1	Develop levels and naming opportunities for capital projects	Policy		2023	Board, Development Committee + CEO
5.12	Shape policies for the management and use of capital funds	Policy		2023	Board, Development Committee + CEO
5.13	Implement Capital Campaign strategy with timing, announcements, and management defined including: <ul style="list-style-type: none">Silent phasePublic phase	Implement	TBD for Capital Campaign consultants	2024	Board, Development Committee + CEO
5.14	Evaluate progress on capital campaigns and revise as needed	Evaluate		2024 + ongoing	Board, Development Committee + CEO

PARTNERSHIP WITH TOWN					
ONGOING RELATIONSHIPS		Implement		Ongoing	Board + CEO
5.15	Continue to manage relationships with Mayor and Town Council as the goals for CDM evolve				
5.16	Revise approach and coordination as is appropriate	Assess		Ongoing	Board + CEO
EARNED INCOME					
EARNED INCOME ASSESSMENT + STRATEGIES		Assess		2017 + ongoing	Director of Finance + Sr. Staff
5.17	Assess current earned income activities addressing ROI (Return On Investment), alignment with mission, effective use of time and resources for: <ul style="list-style-type: none">• Subcontracted programs• In-house programs• Facility rentals• Store• Education Program (Refer to program assessment results)				
5.18	Build strategy for growing or enhancing range of earned income strategies: <ul style="list-style-type: none">• Assign targets and timelines• Determine roll out dates for implementation• Build in evaluation	Plan		2017 + ongoing	Director of Finance + Sr. Staff
5.19	Implement roll out of new and revised earned income strategies	Implement		2017 + ongoing	CEO + Sr. Staff
FINANCIAL POLICIES + PROCEDURES					
5.20	Assess current accounting policies + internal controls	Assess		2016 - 2017	Director of Finance

5.21	Assess store inventory policies	Assess		2016 - 2017	Director of Finance + Store Manager
5.22	Insure the following financial policies are in place and/or updated: <ul style="list-style-type: none"> • General operating procedures • Board Reserve Fund • Endowment Policy • Capital Campaign Policy • Development Policy • Other 	Policy		2018	Finance Committee, CEO + Director of Finance
DIGITAL SUPPORT					
DIGITAL SYSTEMS		Assess	\$20K - TBD	2018	CEO
5.23	Assess current digital capacity tied to current activities + anticipated growth				
5.24	Develop Technology Plan with a shared platform and programs that support activities and retention of information: <ul style="list-style-type: none"> • Online ticket sales • Volunteer tracking • Donor history and records • Membership • Point of sale • Store activities, inventory, and sales (See Goal 4) 	Plan	\$20K - TBD	2019	CEO
5.25	Develop policies to support technology management, lexicon, operations, etc.	Policy		2019 + ongoing	CEO

5.26	Roll out and implement changes as resources allow	Implement	\$5K licenses \$30K towards salary (For expertise, hardware, computer programs, training)	2019 + ongoing	CEO, Senior Staff
5.27	Evaluate digital systems annually with goal of staying abreast of changes and upgrades as is appropriate <ul style="list-style-type: none"> • Address staff capacity in support of digital strategies • Propose upgrades and changes as needed and possible 	Evaluate	TBD	2019 + ongoing	CEO, Senior Staff

STRATEGIC TOOLKIT

TOOL 1: TENETS OF ORGANIZATIONAL CULTURE

TENETS OF CDM ORGANIZATIONAL CULTURE	
<p>At the heart of the organizational culture is the CDM mission:</p> <p>The Coastal Discovery Museum inspires people to care for the Lowcountry.</p> <p><i>Every member of the Board, staff and volunteer corps knows and understands their roles in advancing the mission, upholding the values, and working toward the vision. Every member of the CDM team exemplifies the highest levels of ethical behavior, professionalism, and integrity every day all year long. These tenets are core expectations of CDM and are a part of Board, staff, and volunteer annual performance reviews.</i></p>	
QUALITY	WHAT DOES IT LOOK LIKE IN PRACTICE?
EXEMPLARY ATTITUDE	<ul style="list-style-type: none"> • Strive for the highest quality effort and result on behalf of CDM • Advance exemplary teamwork, expertise, specific roles, and desired outcomes • Engage others with kindness, respect, and professionalism at all times • Support the goals, decisions, and aspirations of CDM always acting for the greater good
POSITIVE COMMUNICATION	<ul style="list-style-type: none"> • Represent CDM professionally and positively when engaging with all communities • Be proactive to solve problems and conflicts respectfully and in a timely manner • Respect one another's time by being planful and organized • Express appreciation to ensure Board, CEO, staff, and volunteers feel valued
OPERATIONAL EFFECTIVENESS	<ul style="list-style-type: none"> • Uphold the distinct roles + responsibilities of the Board, CEO, staff, and volunteers • Strike a realistic and balanced pace of growth without overextending resources • Prioritize goals with clear expectations, timely feedback, and constructive evaluation • Honor decision-making processes, share results, and assess outcomes

TOOL 2: DECISION-MAKING TOOL

Program/Service/Activity _____		Current / Proposed	
SCORE: 1- STRONGLY DISAGREE 2-DISAGREE 3-NEUTRAL 4-AGREE 5-STRONGLY AGREE			
Potential	Score	Notes	
MISSION ADVANCEMENT Supports the mission, values, and vision.			
Supports strategic priorities.			
AUDIENCE REACH Has audience appeal and/or brand awareness.			
Builds communities, donors, and audiences.			
COMMUNITY ENGAGEMENT Builds or supports relationships with specific age groups and/or key communities, such as, Gullah, Latino, Gated Communities, Tourists, etc.			
Has partnership potential.			
INSTITUTIONAL CAPACITY Is fundable or funding is possible.			
Has the capacity (Personnel, finance, space, etc.)			
Has a positive return on investment (ROI).			
UNIQUE OPPORTUNITY Presents a unique or one-of-a-kind opportunity.			
Total Score:		0-29 points 30-39 points 40-50 points	Eliminate / Don't Pursue Rework / Modify Continue / Enhance as Appropriate

Qualitative		Notes	
What will CDM <u>not</u> be able to do as a result of producing this program?			
Does this program compete / impact other programs?			
What does success look like for this program? <ul style="list-style-type: none"> ○ Financial ○ Audience cultivation ○ Other 			
FINAL DECISION			
<input type="checkbox"/> Eliminate/Don't Add		<input type="checkbox"/> Continue/Consider Adding	
		<input type="checkbox"/> Build/Add	
Highlights of decision:		Votes for:	Votes against:
Notes:			
Date:		Signature:	

TOOL 3: PROGRAM/SERVICE ASSESSMENT TOOL

NAME OF PROGRAM/SERVICE:	
<u>Institutional Impact</u> Support of Values, Vision, Mission:	<u>Quality Standards</u> Definition of success:
Need for coordination/communication with other departments: Rate: 1 2 3 4 5 (Best)	Overall quality: Rate: 1 2 3 4 5 (Best)
Other concurrent/competing program(s)/service(s): Internal: External:	Opportunities for community engagement:
Impact on visibility/brand: Rate: 1 2 3 4 5 (Best)	Return on investment (ROI):
<u>Notes for improvement:</u> <div style="display: flex; justify-content: space-between;"> <div> In Strategic Plan: Short-term: Long-term: Comments: </div> <div> When: Within next 3 months Within current year Specify the year </div> </div>	
<u>Final Decision</u> <i>(Check one & explain your answer):</i> <input type="checkbox"/> Program/service worth implementing <input type="checkbox"/> Program/service concept needs modification <input type="checkbox"/> Program/service should not be implemented <input type="checkbox"/> Program/service no longer offered <input type="checkbox"/> Program/service concept put on hold for review at later date	
NAME:	TITLE: <div style="text-align: right;">DATE:</div>

TOOL 4: MISSION IMPACT + FINANCIAL SUSTAINABILITY

DUAL BOTTOM LINE:
MISSION IMPACT AND FINANCIAL SUSTAINABILITY

Mission Impact	High	High mission impact, low profitability <i>(Keep & Address Costs)</i>	High mission impact, high profitability <i>(Invest & Grow)</i>
	Low	Low mission impact, low profitability <i>(Eliminate)</i>	Low mission impact, high profitability <i>(Increase Impact)</i>
		Low	High
		Profitability (\$)	

Jeanne Bell; Jan Masaoka; Steve Zimmerman. (2010.) *Nonprofit Sustainability: Making Strategic Decisions for Financial Viability*. San Francisco: Jossey-Bass. (figure 3.1, p. 25)

APPENDICES

APPENDIX A: PROGRAM ASSESSMENT RESULTS

Decisions made 12/8/16

PROGRAMS	ACTION	NOTES
Docent / Volunteer Programs		All walks, talks, tours that remain on schedule will be adapted to fit mission, focus upon making connections between history and environment, and have a take away message for participants.
Docent-led		
On-site programs - Walks	Modify	Reduce frequency, combine, or remove
On-site programs - Talks	Modify	Remove, adapt
Off-site programs - Nature tours	Modify	Reduce frequency or remove
Off-site programs - History tours	Modify	Adapt to mission
Volunteer Training Program	Modify	In 2017, concentrate on retraining current volunteers to ensure their connection with mission and vision. Evaluate current volunteers and prioritize needs.
Vendor led Programs		All agreements with vendors will be addressed in 2017. Some alterations will be necessary. All vendors will be informed about new mission and vision – and how the CDM will adapt offerings to fit them.
Off-site programs		
Kayak	Modify	Reduce frequency or eliminate minimums
Spartina	Modify	Reduce May River Expedition to 1 x per week, institute a “no minimum” policy, discuss mission. Keep Dolphin Research
Dolphin and Nature	Modify	Discuss mission, add more message to content for docents.
Shrimp Trawl	Eliminate	

PROGRAMS	ACTION	NOTES
On-site programs		
Sweetgrass baskets	Modify	Discuss "no minimum" – consider using new vendor
Cast net	Continue	Consider offering "in house" with volunteers
Critters	Modify	Add content / message docents to the programs. Meet with Maffos in 2017 to discuss new mission and CDM offerings.
Live Animal Encounters	Eliminate	
Youth Programs / Teacher Programs		
School year	Modify	Reduce number of offerings, integrate culture into environment programs and vice versa.
Summer camp	Eliminate	
Summer group programs (B&G, Rec Ctr., etc.)	Modify	Evaluate the offerings to ensure they don't duplicate school year programs. Focus upon Discovery Lab offerings.
Junior Volunteers	On Hold	Consider offering in the future (message of environmental stewardship and 'how I can help' projects in the community)
Tables at Festivals / Career Days	Continue	
Teacher Program	Continue	Continue to evaluate teachers' needs and interests annually.
Lectures	Continue	Evaluate the speakers and add new / different programs to replace those with smaller attendance in 2016-17. Introductory message to include mission and vision.
History Forum	Continue	Ensure speakers fit into the CDM's mission and/or introduce connections and the CDM mission in introductions.
Family Fun Day	Continue	

PROGRAMS	ACTION	NOTES
Group Tours		
On-site programs for not for profits/clubs	Continue	Market more directly.
Off-site programs for not for profits/clubs	Continue (modify)	Be more consistent with fees charged.
Corporate / convention programs	Continue	
History Day	Evaluate after 2017	
Community Groups that meet on-site	Continue	Evaluate all requests to ensure that the effort by staff or volunteers is not too involved.
Visitor Experience		
Self-guided tours/Property	Modify	Consider a simpler map to hand out with less information on it. Offer a guidebook (for sale) with more content.
General Property offerings / gardens / trails / boardwalks	Modify	Add new signage, improve trails.
Around the Horn	Modify	(Consider a simpler map to hand out with less information on it. Offer a guidebook (for sale) with more content.
Scavenger Hunt	Continue	Edited / redesigned in 2016, evaluate annually.
Cell phone Tour	Continue	Update with more content/ seasonally.
Interpretive signage throughout property	Modify	Add more interpretive signs, replace aging ones with new message-oriented signs.
Landscape	Modify	Continue to improve/maintain site
Public Buildings		
Wildlife		
Reservation Desk/Front Desk Volunteers	Modify	Meet with volunteers to discuss new mission, vision, and customer service.

PROGRAMS	ACTION	NOTES
Butterfly Habitat	Continue	Add more plantings/containers, inform garden volunteers about CDM's mission and vision.
Live Animals (Horses, HSC, Myrtle, Discovery Lab)	Continue	
Research/Environmental Programs		
Sea Turtle Program	Continue	
Citizen Science	Continue /Eliminate	Continue Shorebird, HSC Eliminate phytoplankton

EXHIBITIONS	ACTION	NOTES
Indoor Exhibitions		
Temporary Exhibitions	Modify	Reduce to 4 exhibits per year – focused upon themes of history, culture, art, and environment.
Permanent Exhibitions	Modify	Per Strategic Plan to reflect new mission and vision.

MARKETING	ACTION	NOTES
General Marketing		
Information tables at events	Continue	Build a "to go" box with materials.
Printed brochures / handouts / flyers	Continue	
Timeshare Presentations	Continue	

REVENUE GENERATION	ACTION	NOTES
Museum Store	Continue	
Including events like Holiday Market and book signings		

PROGRAMS	ACTION	NOTES
Rental Programs		Revise contracts to reflect new mission and vision – ensuring that message of site conservation and protection is clear.
Corporate	Continue	
Not-for-profit festivals/events	Continue	
Sea Island Room	Continue	
Event Parking	Continue	
Weddings	Continue	
Membership	Continue	
Art Market	Continue	
Adopt-a-Nest	Continue	
Travel Program	Eliminate	
Smithsonian Affiliation	Continue	
Segway Tour	Modify	Initiate more training with Segway guides.
Sweetgrass Basket Tent	Modify	
Gullah Heritage Tour	Modify	

APPENDIX B: STRATEGIC PLANNING PROCESS

The strategic planning process for the Coastal Discovery Museum was undertaken in two phases:

- Phase I took place in 2015, and established the strategic framework of a revised mission, vision, and values plus the definition of five goal areas. This work formed the foundation for Phase II.
- Phase II took place in 2016, and fleshed out goals and strategies to implement the Plan successfully. This phase was made possible due to the generosity of a grant from the Community Foundation of the Lowcountry.

PHASE I - 2015

Institutional Assessment (June + July)

- Established timeline of work, and stakeholder involvement.
- Reviewed internal documents, and researched external environment.
- Scheduled first on-site visit to kick off planning process including a tour of CDM and Hilton Head Island.
- Conducted several days of confidential interviews with key stakeholders (internal and external).

Board + staff retreat (September)

- Held first session with Strategic Planning Committee.
- Facilitated Board + senior staff strategic planning retreat to review interview findings, environmental scan, and establish initial agreement on the direction of the mission, vision, and values plus five strategic goals.

Strategic Framework Review + Adoption (October)

- Facilitated final review and adoption of strategic framework (mission, vision, values and 5 goal areas) by the CDM Board of Directors.

PHASE II - 2016

Launch of Phase II (April)

- Outlined Phase II with CDM leadership building on the Strategic Framework established during Phase I

Additional interviews with stakeholders (May)

- Held additional interviews with more stakeholders

Series of work sessions (May, July and December on-site trips)

- Scheduled on-site trips to flesh out the strategies for the Strategic Plan during Phase II (May, July, December on-site trips)
- Held full Board + senior staff updates whenever on site
- Held Skype sessions with Strategic Planning Committee and goal groups between on-site visits to review drafts of ongoing work
- Facilitated multiple work sessions in the following areas:
 - Core strategic components with the Strategic Planning Committee
 - All five goal working groups with Board and staff
 - Program assessment work sessions with staff
 - Tenets of Organizational Culture + strategic tools with staff

Board Review of Full Plan (December)

- Reviewed the Plan and implications for CDM including upcoming change and scope of work that will unfold
- Discussed the leadership role of the Board and staff for implementing and monitoring the Plan
- Vote to adopt the Plan by the Board of Directors

APPENDIX C: CDM TIMELINE

- 1985 The Environmental and Historical Museum of Hilton Head Island was incorporated as a private, not-for-profit, educational institution. The Museum was housed in a mid-island storefront and mainly offered tours of the historic and environmental sites around the island.
- 1995 The Museum of Hilton Head Island moved to 100 William Hilton Parkway, near the bridge, where it shared a space with the Welcome Center run by the Hilton Head Island Chamber of Commerce. The building was purchased jointly by the Museum and chamber. The Museum was able to offer more exhibits, educational programming, and expanded tours.
- 1996 The Museum changed its name to “Coastal Discovery, The Museum on Hilton Head Island.” For everyday use, the Museum is referred to as the Coastal Discovery Museum.
- 1997 Museum had four full-time staff: Director, Admin./Accountant, Science Curator, and History Curator, as well as a part-time person for Membership.
- 1998 Membership position moved up to full time, giving the Museum 5 full-time staff.
- The Town of Hilton Head purchases the 68.62-acre tract of land known as “Honey Horn Plantation” from the Hack Family in 1998. The impetus of the acquisition was to preserve the tract’s open space.
- The Town approaches officials of the Coastal Discovery Museum to ascertain if they had an interest in utilizing the property. Chris Pendleton, the Museum’s Executive Director writes a proposal to the town in Spring 1999. Ms. Pendleton left the Museum in July 1999. Bill Slaughter, board member, becomes acting CEO.
- 1999 The Coastal Discovery Museum operated the *Dinosaurs at The Mall* exhibit, at Shelter Cove. These robotic dinosaurs provided an opportunity for families to learn about dinosaurs in an entertaining fashion. In 1999, more than 37,000 people visited this exhibit.

- 2000 Dr. Barry Rosen hired as CEO in January.
- 2001 The Town granted Coastal Discovery \$325,000 to assist in the planning effort at Honey Horn. CEO Barry Rosen, left the Museum March 2001, shortly after the ATAX grant was approved. Former Board Chairman, Bill Slaughter was then hired to be the interim Executive Director while the Museum conducted a national search for a new chief executive.
- 2002 Michael Marks hired as CEO.
- 2003 Attendance was 83,000 visitors (visitor's center location), 10,000 tours, cruises, and summer programs.
- The Museum has entered into a new partnership with the Town of Hilton Head Island by arranging for a long-term lease of the Honey Horn property.
- First art market operated by CDM. This show has previously been administered (2 years) by the Hilton Head Hospitality Association and staged at Shelter Cove Marina.
- 2007 The Coastal Discovery Museum opens at Honey Horn, Saturday October 27th.
Museum added four part-time staff for Discovery House.
Several large rental events start at Honey Horn, Winetime, Concours d'Elegance.
- 2008 First Family Fun Day, these have continued as an annual event with a lot of programming for kids.
- The Native Island Business and Community Affairs Association first use of the Honey Horn property to stage the annual Gullah Celebration.
- Kiwanis starts holding Chili Cook off and Rib Burn off at Honey Horn.
- 2008/09 Nearly 71,000 people visited Honey Horn! Of these, 32,300 people walked through the door of the Discovery House. During the same timeframe, at the William Hilton Parkway campus, 54,070 guests came through the building. (July through June)

- 2009 With the hiring an educator Amy, the Museum now has 6 FT staff.
Butterfly enclosure opens.
Horse barn renovated.
Camellia garden planted.

- 2010 Shell pathway continued past pavilion to horse barn.
Shell ring added.
Pasture fenced and Marsh Tacky Horses arrive.

- 2011 Armstrong Hack renovated.
Kids Zone added to Discovery House.

- 2014 Birds Eye View Theater finished.
Rex Garniewicz starts as President/CEO. (July 1, 2014)
New Website goes live. (July 29, 2014)

- 2015 Coastal Discovery Museum becomes a Smithsonian Affiliate. (June)
Ground Breaking on construction of Discovery Lab. (July)
Funding for Phase I of strategic planning secured from Community Foundation of the Lowcountry
Phase I of strategic planning (July – October)

- 2016 Phase II of funding received from Community Foundation of the Lowcountry to complete planning
Phase II of strategic planning (April – October)
Hurricane Matthew disrupts operations (October)
Complete and adopt Strategic Plan (December)

APPENDIX D: GUIDELINES FOR USING THE PLAN

The Coastal Discovery Museum Plan is a road map and a core management tool that should be used on an ongoing basis. As a living document, this Plan will need to be modified and adjusted over time. Listed below are suggestions for using the Coastal Discovery Museum Strategic Plan. These guidelines are designed to help the Board and staff uphold their roles in support of the Plan and most importantly the mission, vision, and values for the future.

BOARD OF DIRECTORS

As the governing body of the Coastal Discovery Museum, the Board is responsible for assuring that: CDM has a Strategic Plan; CDM resources are appropriately allocated in support of that Plan; and, the Plan is used and modified as necessary over time. Listed below are some suggestions for the Board in the use and implementation of this Plan.

The Board:

- Outlines expectations so all Board members understand their leadership role as a Board member in implementing the Plan;
- Uses the mission, vision, and values to guide the work of the organization;
- Supports the Plan by making sure the proper supporting policies and procedures are in place and are updated as needed;
- Uses the Plan as the road map for Board work all year long:
 - Assures all objectives, requiring Board involvement, are assigned to Board Committees for the successful completion of the work;
 - Uses the Plan as reference for Committee and task force work;
 - Provides updates and conducts progress assessments of the Plan at Board meetings, and adjusts deadlines and priorities as needed;
 - Conducts an annual review of the Plan with Board and staff to assess progress made over the past year, and to plan for the upcoming year including financial and resource allocations;
- Uses outcome measurements for assessing the successful implementation of the Plan. Outcome measurements, like other aspects of the Plan, are likely to be adjusted over time to reflect the changing nature of the organization. It is recommended that outcome measurements be assessed once a year. It is best to do this prior to the annual review of the Plan so adequate information is on hand to inform the assessment of progress made advancing the Plan;
- Bases decisions on the priorities of the Plan and makes adjustments when appropriate. When new opportunities arise, the Board should consider the impact to the Plan and gain input from staff, as appropriate, in order to make a balanced and

informed decision. Most decisions will be processed at the staff level, however, in some cases taking on a new priority may require a vote by the Board and require postponing some tasks in order to devote adequate time and resources to the new priority. If a new opportunity or shift in priorities occurs the Plan should be modified accordingly and involved parties notified including making adjustments to the budget;

- Evaluates the full Board and its performance advancing the Plan;
- Ties individual Board performance to responsibilities outlined in the Plan in tandem with Board member expectations;
- Distinguishes the specific Board and staff roles and responsibilities in advancing the Plan;
- Reviews the Plan during the Board recruitment process;
- Reviews the Plan with new Board members during Board orientation;
- Uses the priorities and responsibilities laid out in the Plan to clarify expectations and annual goals for the coming year for the Executive Director and then refers to them during annual performance reviews;
- Uses the Plan for fundraising purposes;
- Communicates the mission, vision, values, and goals set forth in the Plan with stakeholders, the community and the public; and,
- Prepares to create the next five-year Strategic Plan about a year before the conclusion of the current Plan.

CHIEF EXECUTIVE OFFICER

The Chief Executive Officer (CEO) is responsible for assuring that the Plan guides the work of the Board, the staff, and volunteers. By setting a clear road map for CDM, this Strategic Plan clarifies the leadership role and responsibilities that the CEO must undertake.

The CEO:

- Assures that his/her annual goals and expectations incorporate the priorities of the Plan;
- Correlates all staff job descriptions and responsibilities to the specific goals and objectives laid out in the Plan;
- Ensures that annual goals and objectives for each staff member are based on the priorities in the Plan and assures that these are referred to during annual performance reviews;
- Ensures staff understand their responsibility for supporting the mission, upholding the values, and working toward the vision as well as their commitment to uphold the Tenets of Staff Culture, and other tools created to guide the work of the staff;
- Assures that volunteers are properly informed about the Plan and understand their role in implementing the Plan;
- Builds annual budgets and annual staff plans based on priorities defined in the Plan;
- Uses this Plan on an ongoing basis for guiding the work of the staff including during staff meetings, one-on-one meetings with staff members, for projects at CDM, and so on;

- Uses outcome measurements during the annual review of the Plan and adjusts the strategies and objectives for the coming year based on results of outcome measurement results;
- Supports the Board and Plan by making sure the proper supporting policies and procedures are in place and are updated as needed;
- Uses the Plan as a tool when recruiting and hiring new staff;
- Bases decisions on the priorities of the Plan and makes adjustments when appropriate. When new opportunities arise, consider the impact to the Plan and gain input from Board and staff as appropriate in order to make a balanced and informed decision. Some decisions require Board approval while most can be managed at the staff level. In some cases taking on a new priority may require postponing some tasks in order to devote adequate time and resources to the new priority. If a new opportunity or shift in priorities occurs, the Plan should be modified accordingly and involved parties notified;
- Uses the Plan for fundraising purposes;
- Communicates the mission, values, vision and goals set forth in the Plan with stakeholders, the community and the public; and,
- Prepares to create the next three-to-five year Strategic Plan about a year before the conclusion of the current Plan.

STAFF

Staff is responsible for using the Plan to guide and prioritize their work. The Plan is a valuable tool for conveying the overall priorities of CDM to staff and providing context for their specific role in advancing the Plan.

Staff:

- Are proactive in understanding their role and responsibilities as laid out in the Plan;
- Understand how each staff member supports the mission, upholds the values, and works toward the vision;
- Uphold their responsibility for supporting the mission and the values, working toward the vision as well as the Tenets of Staff Culture, and other tools created to guide the work of the staff;
- Work with the CEO to clarify job responsibilities, annual goals and objectives and similarly assure that those who report to them receive the same level of support;
- Refer to annual goals and objectives, annual plans and the Plan during annual performance reviews;
- Use the Plan for individual planning and management purposes, departmental meetings, project meetings, or other ongoing aspects of operations;
- Base decisions on the priorities of the Plan and are prepared to make adjustments when appropriate. When new opportunities arise consider the impact to the Plan and bring the opportunity to the attention of the CEO, who will in turn bring it to the Board, if

- needed. Some decisions require Board approval while most can be managed at the staff level. In some cases taking on a new priority may require postponing some tasks in order to devote adequate time and resources to the new priority. If a new opportunity or shift in priorities occurs, the Plan should be modified accordingly and departments and individuals involved notified immediately;
- Support the CEO during the budget planning process assuring that priorities outlined in the Plan are accounted for in the annual operating budget and are adjusted as needed throughout the year; and,
- Assure volunteers understand their role in advancing the Strategic Plan including educating them on the importance of the mission, values, and vision.
- Receive staff guidance for understanding any new areas of work or shifts in existing work including training as needed, to assist them in their work as appropriate; and,
- Receive information about updates and changes to the Plan over time.

VOLUNTEERS

Volunteers provide critical support to the staff all year long and play a significant role in helping staff members accomplish their goals. Volunteers need to be informed of the priorities and direction outlined in the Plan, and how their particular volunteer efforts support the Plan.

Volunteers:

- Understand their role and responsibilities for advancing the Plan and in particular understand the overall direction and priorities of CDM;
- Support the leadership provided by the CEO and Board of Directors assuring that all volunteer efforts support an integrated operation and institutional priorities;

APPENDIX E: INTERVIEWEES + PLANNING PARTICIPANTS

COMMUNITY PARTICIPANTS

Frederick Hack (Community Committee Member)
Thomas C. Barnwell, Jr. (Native Islander)
Lou Benfante (Heritage Library)
David Bennett (Mayor, Hilton Head Island)
Alex Brown (Native Islander)
Emory Campbell (Native Islander)
Irvin Campbell (Native Islander/Mitchelville Project)
Terry Herron (Eco Advocate)
Kim Likins (Town Council)

Ariana Pernice (Visitor and Convention Bureau)
Linda Piekut (Heritage Library)
Steve Riley (Town Manager, Hilton Head Island)
Jim Robinson (Heritage Library)
Stu Rodman (County Council)
Luanna Graves Sellars (Heritage Library)
Lavon Stevens (Mitchelville Project)
Gerrold Walker (Mitchelville Project)

BOARD

Fred Manske, Jr., Chairman
Bill Edison, Vice Chairman
Becky McCorkendale, Secretary
Tom Wertheimer, Treasurer
Karen Anderson
Lindsay Bunting
Mark Baker
Elizabeth (Beth) Birdwell
Dede Bush
Ellen Dupps
Herbert Ford
Terry Grant

Dr. Neil Green
Sonny Huntley
Jane Inglis
Lynn King
Frederick Hack
Porter Morgan
Tom Peeples
Heidi Perez
Shirley (Peaches) Peterson
Leslie Richardson
Paul Stevens
Tom Tracy

STAFF

Rex Garniewicz, President and CEO
Dawn Brut, Curator of Education
Carlos Chacon, Manager of Natural History
Natalie Hefter, VP of Programs

Jennifer Stupica, Director Finance/Administration
Robin Swift, VP of Marketing & Development
Daniel Voegele, Grounds and Facilities Technician
Christina Stauffer, Volunteer and Docent Coordinator

VOLUNTEERS

Jen Bigus
Carol Clemens
Don Grubba
Gini Holihan
Leigh Ann Howitt

Jim Reeves
Lou Wozniak
Pam Wozniak
Helen Xenakis