



DRAFT Strategic Plan 2003-2005

MISSION STATEMENT

The Washington Trust helps make local historic preservation work. We build an ethic that preserves Washington's historic places through advocacy, education, collaboration and stewardship.

GOALS AND STRATEGIES

Preservation Goal and Strategies

Historic places are preserved in perpetuity.

1. Advocate for strong public policies and financial incentives to support preservation.
2. Provide direct support and resources to help local preservation efforts.
3. Build the capacity of grassroots preservation efforts.
4. Serve as strong stewards of the Stimson-Green Mansion and other historic properties.
5. Provide information to key audiences on preservation issues and opportunities.

Education Goal and Strategies

A strong preservation ethic supports stewardship of historic places.

1. Distribute information to key audiences on preservation issues and opportunities.
2. Promote connections between preservation and other important community issues.

Capacity Goal and Strategies

The organization is capable of effectively fulfilling its mission.

1. Build a strong, involved board of directors.
2. Develop staffing structure to support the efforts of the Trust
3. Develop funding to support the needs of the organization.
4. Raise the visibility of the Trust statewide.
5. Strengthen the organizational systems to support the efforts of the Trust.

Preservation Goal

Historic places are preserved in perpetuity

Strategy	2003	2004	2005
Advocate for strong public policies and financial incentives to support preservation	Build and strengthen relationships with key local officials, state legislators and Congressional delegation		
		Influence transportation policies and funding to support preservation	
	Cultivate lobbyist to support legislative focus on preservation	Hire lobbyist as needed to support legislation	
	Build a coalition to influence funding formula for historic schools		Create a forum with preservation partners to identify issues and formulate public policy
	Work with local partners to influence funding for state and local preservation		
	Develop e-mail advocacy network	Expand advocacy network and link with local networks	
	Participate in development of state historic preservation plan	Work to pass key preservation laws and policies identified in state historic preservation plan	

Preservation Goal

Historic places are preserved in perpetuity

Strategy	2003	2004	2005
Provide direct support and resources to help local preservation efforts	Actively promote and distribute grants through the Washington Preserves Fund		
		Increase funding in WA Preserves fund and expand its ability to leverage National Trust funds	
	Promote protection of endangered properties and direct intensive intervention through annual 10 Most list		
	Develop intervention policy and criteria for Trust involvement in local preservation efforts		
	Provide technical assistance to local preservationists on phone and in field		
		Develop resource kits and other tools to support local preservationists	Develop capacity to provide technical assistance to local groups
	Speak to local leaders on behalf of key preservation projects		

Preservation Goal

Historic places are preserved in perpetuity

Strategy	2003	2004	2005
Build the capacity of grassroots preservation efforts	Sponsor one statewide conference with other groups		
	Reach out to grassroots to identify opportunities, issues and to seek volunteers		Explore potential for state preservation conference
	Sponsor workshops on topics important to local preservation		
		Develop training and development opportunities for preservation leaders	
		Optimize Washington presence in Portland NTHP conference	
Serve as strong stewards of the Stimson-Green Mansion and other historic properties	Model best preservation and management practices with Stimson-Green Mansion		
		Develop collection plan for furniture, are, antiques and artifacts	
	Perform deferred maintenance on exterior trim and landscaping	Develop and institute cyclical maintenance plan for mansion	
	Minimize property and business taxes through special valuation and exemptions		Explore opportunities to institute a WA Trust easement program

Education Goal

A strong preservation ethic supports stewardship of historic places

Strategy	2003	2004	2005	
<p>Provide information to key audiences on preservation issues and opportunities</p>	<p>Launch, actively promote and manage web site focused on the Trust and on preservation issues in Washington</p>			
		<p>Continue to integrate information and resources into web site to keep it fresh</p>		
	<p>Provide schools report and promote value of historic schools among school and preservation leaders</p>			
		<p>Develop resources to support Board's role as ambassadors to the community</p>		
	<p>Determine key audiences and what resources they need</p>		<p>Provide preservation resource materials in partnership with other groups</p>	
	<p>Publish and distribute broadly the Trust's quarterly newsletter</p>			
		<p>Use newsletter inserts to address critical preservation issues and themes</p>		

Education Goal

A strong preservation ethic supports stewardship of historic places

Strategy	2003	2004	2005
Provide information to key audiences on preservation issues and opportunities (cont'd)	Develop pilot program for public tours of Stimson-Green Mansion	Institute regular public and special tours of Stimson-Green Mansion	
			Develop school tours and accompanying curriculum for Stimson-Green Mansion
		Explore ways to use mansion as an educational resource	
			Develop resources to support Board role as historic preservation ambassadors
Promote connections between preservation and other important community issues	Build and strengthen partnerships with businesses and other private organizations		
	Collaborate with SHPO, Downtown Revitalization and others to produce study on economic benefits of historic preservation	Assist in broad distribution of economic benefits study to public officials, preservationists and developers	
	Define annual statewide preservation awards program	Sponsor annual statewide preservation awards celebration	
		Establish a presence at other related organizations' events and programs	

Capacity Goal

The organization is capable of effectively fulfilling its mission

Strategy	2003	2004	2005
Build a strong, involved board of directors	Institute strong board development process and improve diversity of skills, connections and demographics		
		Improve board orientation, support materials, and training activities	
	Recruit non-board committee members and mobilize all committees		
	Expand ex-officio and liaison involvement on the Board and committees		
Develop staffing structure to support the efforts of the Trust	Institute annual staff performance reviews	Develop personnel policies and manual	
	Convert Stimson-Green general manager to staff position with expanded program responsibilities	Develop a 3-5 year staffing plan	

Capacity Goal

The organization is capable of effectively fulfilling its mission

Strategy	2003	2004	2005
<p>Develop funding to support the needs of the organization</p>	<p>Develop and implement major donor cultivation and solicitation plan</p>		
		<p>Update fundraising plan</p>	
	<p>Expand membership through targeted direct mail and solicitations</p>		
		<p>Cultivate donors and members through an annual signature event</p>	
	<p>Expand grant revenue and cultivate new foundation donors</p>		
	<p>Insure SGMCC institutes strong business and marketing plan to maximize revenue to WA Trust</p>		

Capacity Goal

The organization is capable of effectively fulfilling its mission

strategy	2003	2004	2005
Raise the visibility of the Trust statewide	Launch new graphic image and distribute communication materials broadly to reflect “new and improved” WA Trust	Focus attention on National Historic Preservation Week to raise visibility of WA Trust and preservation statewide	
			Plan 30 th anniversary events for 2006 to increase awareness of WA Trust
	Ensure press releases and personal press contacts are made to raise visibility of Trust programs in all communities affected as well as major markets		
			Develop annual communications strategy and marketing plan
Strengthen the organizational systems to support the efforts of the Trust	Review and update strategic plan annually		
	Develop organizational policy manual		Implement a comprehensive strategic planning process with extensive outreach
	Develop new ways for the public to get involved in all aspects of the Trust		
	Put in place system to ensure strong financial management		
	Review and revise bylaws		