

# **The Accokeek Foundation Strategic Plan 2006**

**Presented to the Board of Trustees  
May 6, 2006**

## **Preamble: The Accokeek Foundation at the Half-Century Mark**

2007 will mark the fiftieth anniversary of the incorporation of the Accokeek Foundation. Instead of merely celebrating this milestone, the Accokeek Foundation will commemorate the foresight and hard work of the past half-century by planning for the future. This Strategic Plan, therefore, sets out a program both to invest in the place-based programs for which the Accokeek Foundation is now known, and to invest in the incubation of new ideas and programs that can ensure the Foundation remains a leader and an innovator in the half-century ahead.

In the beginning Frances Payne Bolton created the pattern. She was a visionary who not only invested in real property, buying the Bliss Farm at Bryan Point in Accokeek, establishing the Accokeek Foundation as one of the earliest land trusts in the region, and creating new place-based plans and programs, but she also invested in ideas. The Accokeek Foundation funded study, research, and writing by scholars such as Frederick A. Gutheim, Wilbur H. Hunter, and Ralph Singleton, upon whose work our programs and those of many other organizations and agencies are now based.

In its first fifty years the Accokeek Foundation realized its “Possible Dream” of preserving the view across from Mount Vernon and establishing an appropriate use in the public interest. Along the way, the Foundation also compiled an impressive list of “firsts,” and significant accomplishments, including, the following:

- Creating a new kind of National Park, based on public-private partnerships
- Facilitating the emergence of the conservation easement as the most important land conservation tool of the 20<sup>th</sup> century
- Pioneering the development of agricultural history and living history museums
- Initiating a multi-disciplinary approach to Potomac River conservation, culminating in the designation in 1997 of the Potomac as an American Heritage River
- Establishing a demonstration of Sustainable Agriculture in Piscataway National Park, that is fully accessible to the public and is involved in cutting-edge training and research in the field
- Developing innovative place-based programs for interpreting the relationship between culture and nature, serving some 6,000 school children each year, as well as thousands of individuals and families who visit Piscataway Park

This 50<sup>th</sup> Anniversary Initiative is designed to build on and enhance those accomplishments, and to lay the groundwork for new ideas and programs in the future. It is divided into five themes:

- Exhibitions
- Outreach and Audience Development
- Research, Scholarship and Program Development
- Visitor Services and Site Improvements
- Social and Public Events

This 50<sup>th</sup> Anniversary Initiative is interwoven throughout the Strategic Plan. Specific elements are noted with an Asterisk (\*).

## **The Plan: Continuing a Tradition of Excellence**

**A Vision for the Future:** The Accokeek Foundation will use its programs in Piscataway Park to study and interpret the history of this place and its people, to demonstrate best practices for using it now, and to test the possibilities for using new ideas and technologies to promote a sustainable future. We will do our best to embody the concepts of sustainability and excellence in every aspect of our organization.

**The Purpose of This Plan:** This Strategic Plan provides a framework and a guide for moving the Accokeek Foundation and its programs in the direction of the Vision for the Future. It is organized according to the Foundation’s Board of Trustees Committee structure so that it may be used by staff and Committees for setting agendas, work plans, developing new project ideas, and measuring successes. This Plan is heavily weighted to Programs, because that is where the greatest proportion of the Foundation’s resources and efforts are concentrated. However, the Plan gives significant standing to the two main supporting activities: Governance and Resource Development, and Finance and Investment Stewardship.

### **I. Programs**

**Overall Goal:** Our goal is to become a destination for all in our region who seek to learn about the relationships among people, land, nature, agriculture, and the river; to educate people about the history and present state of those relationships; and to explore models for developing a sustainable future.

**A. Education and Interpretation.** The Goal of the Education and Interpretation department is to provide first-rate school, public, and specialized programs that are interesting, provocative, and based on the best scholarship available.

To achieve this Goal, we will pursue the following Strategic Objectives:

1. Develop, maintain and refine a comprehensive interpretive and education strategy and supportive resource materials, reflecting the needs and interests of participants including those of diverse racial and ethnic backgrounds, persons with disabilities and people of all ages.

2. Design and install a permanent exhibit that orients visitors to the region's natural and cultural history in the Education Center and the Visitor Center, and auxiliary exhibits as appropriate to be shown at other venues.\*
3. Develop a relationship with Mount Vernon that encourages additional visitors there to visit the National Colonial Farm, possibly through an exhibit at Mount Vernon.\*
4. Develop formal partnerships with specific schools.\*
5. Develop a pilot summer workshop on Colonial Life and consider future expansion of the program to include nature/environmental and Native American components.\*
6. Continue and expand the regular annual program of special events.
7. Foster partnerships with local organizations to develop Native American and African American interpretation, possibly including hosting of a Native American festival at the Foundation to complement the African American festival and other public events, exhibits on African American and Native American themes, and specialized interpretive tours that highlight the African American and Native American history of the area.\*
8. Strengthen the involvement of students, scholars, scientists and universities in historical, agricultural, environmental and archeological research, seminars, symposia, exhibits, collaborative projects and the presentation of results.\*
9. Assess the future of boat service operations to and from Mount Vernon, as well as other points along the river, and reinstitute the boat service if feasible.
10. Develop a pilot internship and training program for first-person interpretation of historic sites.\*
11. Consider participating in a Conservation Assessment Project to review and assess the Accokeek Foundation's inanimate collections and their use and care.

**B. Sustainable Agriculture.** The Goal of the Sustainable Agriculture department is to bring all our agricultural activities under the umbrella of sustainability. We will also expand and enhance the Center for Land-Based Training into a national model for research, scholarship, education and public information about sustainability in general and sustainable agriculture in particular.

To achieve this Goal we will pursue the following Strategic Objectives:

1. Ensure that the National Colonial Farm continues to present a historically accurate and authentic representation of heirloom crops and heritage breeds of livestock.
2. Explore additional ways to integrate and present the work of the Colonial Farm in a manner that relates to comparative issues of historical and modern land use, sustainability and the impact of people on the land as a link to the Ecosystem Farm.
3. Maintain Organic Certification for the Ecosystem Farm and pursue Organic Certification for other farming operations within Piscataway Park.\*
4. Practice sustainable agriculture by applying modern research, technology and materials to demonstrate ecosystem-friendly practices (including use of alternative energy sources), to practice soil regeneration, to teach people the

value of locally grown products, to show the complexity of food production systems and to improve production standards and tools to be more environmentally sound.

5. Continue the Center for Land-Based Training's apprenticeship training program and explore expanding the Center into the development of different training models as well.\*
6. Explore the expansion of the Center for Land-Based Training, either on site or off site, such as the establishment of a sustainable agriculture think-tank and research center, as well as programs on nutrition and wellness.\*
7. Maintain a breeding program for heritage breed livestock and continue and expand the "Preservation through Propagation" seed saving program for heirloom crops.
8. Continue to research and demonstrate Native American and African crops, as well as European varieties.
9. Develop multi-species, rotational, and organic pasture management programs that integrate the rare livestock breeds into sustainable agricultural systems.\*

**C. Sustainable Resource Stewardship.** The Goal of the Sustainable Resource Stewardship Department is to become a recognized leader in the issues of sustainable land and facilities management. We will examine the sustainability of our current practices and will develop and implement strategies for the future.

To achieve this Goal we will pursue the following Strategic Objectives:

1. Identify and implement Best Management Practices to maintain a natural resource plan.
2. Provide access for scholars and students to the Henry A. Wallace Herbarium, the Strasburg Insect Collection and the living collections of the arboretum and chestnut groves.\*
3. Cooperate with neighboring organizations and the National Park Service in a program to monitor and manage invasive and exotic species within Piscataway Park.
4. Create a comprehensive inventory of equipment, tools, and machinery and develop a cyclical operations and maintenance schedule that identifies, prioritizes and budgets for upkeep, repairs and replacements.\*
5. Repair or replace the boat dock and make it fully accessible by land and by boat and modify the fishing pier to enable boats to land.\*
6. Develop an emergency preparedness plan for the Foundation's staff, visitors, technological resources, property and other assets that will lessen the potential damage caused by any catastrophic event.\*
7. Complete plans and specifications for new environmentally-friendly landscaping and enhanced visitor access around the Education Center and the entire site.\*
8. Increase the sustainability of the Education Building by installing a green roof and solar-powered in-floor radiant heating system. \*
9. Explore the use of alternative and innovative ways of increasing the sustainability of our buildings and equipment (e.g., solar power, bio-diesel

fuel, hybrid technologies), with the goal of reducing long-term operating costs and impact on the environment.

10. Develop a long-term facilities plan for the major maintenance and/or replacement of buildings and other facilities.
11. With county, state and NPS approvals, award contracts and monitor installation of new innovative septic system to serve the administration building and the caretakers' house.
12. Develop a comprehensive plan for the maintenance and preservation of historic structures on the site.\*
13. Develop and implement a technology plan for ensuring the maintenance, updating, and replacement of technology used to carry out the Foundation's mission.

## II. Governance and Resource Development

**Overall Goal:** Our Goal is to maintain the highest standards of excellence in governance and management and to ensure ample financial and other resources to carry out the Accokeek Foundation's programs.

**A. Governance.** The Goal for Governance is to continue to recruit and retain highly qualified and motivated people to the Board of Trustees and senior management positions.

To achieve this Goal we will pursue the following Strategic Objectives:

1. Develop a fully effective Board of Trustees of appropriate size through the careful selection of candidates, orientation and training, instruction on responsibilities, committee assignments, participation in annual and special giving, assistance in fund raising, monitoring and nurturing of board/staff relationships and strong Board participation in Foundation activities.
2. Establish formal and informal ways to use outside experts and specialists to advise the Board and staff on topics of interest including interpretation and outreach to the local community.
3. Maintain a Committee structure that monitors, reviews, and reports regularly to the Board of Trustees on the Strategic Plan.
4. Develop annual performance plans for evaluation of leadership and staff to ensure mission goals are met.
5. Establish procedures for review and evaluations of new program ideas, new programs, and ongoing programs.

**B. Resource Development.** The Goal of the Resource Development Department is to ensure that the Accokeek Foundation has funds and other support to carry out its mission and Strategic Goals and Objectives.

We will achieve this Goal by pursuing the following Strategic Objectives:

1. Strive for 100% participation by our Board of Trustees in the Annual Campaign.

2. Participate in workplace giving campaigns (Combined Federal Campaign) through mechanisms such as the Environmental Fund for Maryland.
3. Seek grants from private foundations, corporations, and government agencies.
4. Increase individual giving.
5. Continue to examine and improve the income generation potential of the Ecosystem Farm CSA, the Visitor Center, and other revenue producing activities.
6. Initiate Planned Giving and Major Gifts programs, particularly among Board Members and former Board Members.\*

**C. Communications and Audience Development.** The Goal of the Communications and Audience Development Department is to raise the Accokeek Foundation's visibility at all levels by a strategic program of information, publication, and outreach.

We will achieve this goal by pursuing the following Strategic Objectives:

1. Sustain the current highly effective working relationships with the National Park Service.
2. Explore ways to elevate the intellectual and collaborative relationship with Mount Vernon.
3. Implement the Accokeek Foundation's new brand and messages in all communications, including routine correspondence, newsletters, press releases, annual reports, website, e-mail, and educational publications.\*
4. Administer surveys, program evaluations, and other market research tools to guide development of initiatives and to shape programs.
5. Consolidate and enhance database management to facilitate collection and maintenance of information.
6. Hold periodic board and staff retreats and planning sessions.
7. Increase general visibility, public visitation and participation in regular and special programs through well-planned strategic communications, including direct mail, advertising, press releases, flyers, posters and signage.\*
8. Encourage use of the site, its resources, and programs in a manner that is compatible with the community and the Foundation's facilities use policies.
9. Through regular recruitment, training and retention efforts, promote an active volunteer program that draws a diverse audience of participants.
10. Develop a series of appropriate social and public events to commemorate the Accokeek Foundation's 50<sup>th</sup> Anniversary.\*

### **III. Financial and Investment Management**

**Overall Goal:** The Goal of the Accokeek Foundation's Financial and Investment Management is to ensure the highest standards of fiscal responsibility and to use the Foundation's funds prudently and in a way that supports and sustains the institution over the long term.

**A. Financial Management.** The Goal of Financial Management is to exercise diligence, prudence, and vigilance in all financial transactions.

We will achieve this goal by pursuing the following Strategic Objectives:

1. Conduct an annual planning process that identifies, prioritizes and budgets for personnel, training, communications, services, supplies, equipment and other operational needs.
2. Maintain an independent Audit Committee that engages, supervises, and reports to the Board of Trustees on the findings of the annual audit.
3. Maintain an active Finance Committee that monitors, reviews, and reports to the Board of Trustees on financial matters, including income and expenses, throughout the year.
4. Maintain the highest standards of ethics and conduct in the handling and oversight of money and financial transactions.

**B. Investment Management.** The Goal of Investment Management is to exercise diligence, prudence, and vigilance in the stewardship of the Accokeek Foundation's financial assets.

We will achieve this goal by pursuing the following Strategic Objectives:

1. Review and monitor the Investment Philosophy for the Accokeek Foundation's investment portfolio.
2. Review and monitor the Investment Guidelines and Directives for the Accokeek Foundation's investment portfolio.
3. Engage, oversee, and review the work of an investment manager or managers.
4. Use the financial assets to support the Accokeek Foundation's mission and programs, and manage them in such a way as to promote long-term institutional sustainability.

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