

Craik-Patton, Inc. & NSCDA-WV & Craik-Patton House Foundation

STRATEGIC PLAN

July 2017 – July 2022



Mission

Three united, established, separate organizations working together to encourage the study and advancement of history through education and the preservation of the Craik-Patton Museum House, grounds and collections.

Vision

- A center of operations for Craik-Patton, Inc., NSCDA-WV and Craik-Patton House Foundation, Inc.
- We envision a financially secure Craik-Patton House
- A go to historical home and grounds
- A Kanawha Valley educational resource
- An expanded outreach across the state through the Internet

Guiding Principles for NSCDA-WV, Craik-Patton House, Inc., and Craik-Patton House Foundation, Inc.

- strives to accurately depict the lives of the Craiks (1834-1844) and the Pattons (1858-1864) by displaying period appropriate decorative arts, furnishings, and acquisitions in the Craik-Patton House;
- maintains its grounds, “The Elms” Well House, and the Ruffner Log House to be accessible to the public year round;
- conducts its business in accordance with the highest professional standards;
- values the history of all who owned, lived in, or worked in these properties;
- encourages the study and advancement of history through guided tours, public programming, and heritage development, and

- serves as headquarters for the National Society of the Colonial Dames of America in the State of West Virginia, Inc.

Financial Sustainability

Craik-Patton House was purchased by the West Virginia Dames in 1973, saving it from demolition, and moving it to property beside the Kanawha River on state route 60 (the historic Midland Trail). The WV Dames financed the restoration, maintenance and furnishings of the house and managed the house and property. In the 1990's, the house was incorporated and a community board was installed. The WV Dames comprise 60% of the board positions. The Dames continued to support the house but there has never been a comprehensive financial plan. Craik-Patton needs a plan for future financial stability that embraces a diversified income stream through Dames, community, foundations, government and corporate support, along with the encouragement of major gifts and bequests to grow the Foundation.

Critical Issues

- How can we become more financially sustainable?
- How can we diversify our funding so we rely less exclusively on NSCDA-WV?
- How can we become financially secure?
- How can we become a regional point of interest?
- How can we raise more money more quickly?

Goal I Improve donor cultivation, communication and recognition.

A. Establish a Publicity Committee

1. Distribute Craik-Patton House brochures, promote uses of the house for private events, create posters and news articles about the events, promote the House through the Internet, and promote the House through other history organizations.

1. Year 1

2. Assigned to Craik-Patton, Inc.

B. Design and implement regular annual communication to share news about Craik-Patton House. This could include photos, information about activities, recent collection information, and include an annual report that lists donors.

1. Year 1

2. Assigned to C-P, Inc., NSCDA-WV, and C-P Foundation

C. Create a Finance Committee to identify major gift donations to C-P Foundation.

1. Year 2

2. Assigned to C-P Foundation

- D. Solicit donations, thank/recognize donors
 - 1. Year 1-5
 - 2. Assigned to Craik-Patton, Inc., NSCDA-WV, and C-P Foundation
- E. Create gift levels and a recognition plan for major donors.
 - 1. Year 3
 - 2. Assigned to Craik-Patton, Inc., NSCDA-WV and C-P Foundation
- F. Begin outreach to C-P descendants for support.
 - 1. Year 2
 - 2. Assigned to NSCDA-WV
- G. Make comprehensive gift options available to NSCDA-WV members.
 - 1. Year 1
 - 2. Assigned to NSCDA-WV and Craik-Patton, Inc.

Goal II Build annual operating support for C-P with campaigns and support groups.

- A. Grow the Friends of Craik-Patton community members by 10% each year.
 - 1. Year 1
 - 2. Assigned to Friends of C-P Committee and Craik-Patton, Inc.
- B. Increase the days open to the public
 - 1. Year 3
 - 2. Assigned to Craik-Patton, Inc.
- C. Extend the Skype Tour to retirement communities and other organizations
 - 1. Year 2
 - 2. Assigned to Craik-Patton, Inc. and the Executive Director
- D. Grow the Annual Fund Campaign for NSCDA-WV by 10% each year.
 - 1. Year 1
 - 2. Assigned to NSCDA-WV
- E. Host two major fundraising events each year: Cocktail Benefit & Auction to raise \$20,000 each year and a History Luncheon to raise \$10,000 each year.
 - 1. Year 1 Cocktail Benefit Assigned to Craik-Patton, Inc.
 - 2. Year 2 Cocktail Benefit & Silent Auction: Assigned to Craik-Patton, Inc.
 - 3. Year 3 Cocktail Benefit and Auction: Assigned to Craik-Patton, Inc.
 - 4. Year 1 History Luncheon: Assigned to NSCDA-WV - Charleston
 - 5. Year 2 History Luncheon assigned to NSCDA-WV – Huntington
 - 6. Year 3 History Luncheon assigned to NSCDA-WV – Bluefield/Lewisburg
- F. Build corporate support through vendors.
 - 1. Year 3
 - 2. Assigned to Craik-Patton, Inc.

Goal III Grow earned income.

- A. Increase rental contracts by 20% each year by targeting meeting planners, caterers, and other related vendors.
 - 1. Year 4
 - 2. Assigned to Craik-Patton, Inc. Executive Director
 - 3. Year 1 create a brochure with the help of the C-P Publicity Committee
- B. Create an Investment Committee.
 - 1. Year 2
 - 2. Assigned to CP Foundation
- C. Market the Amazon Smile Program to all Friends and Dames and increase participants by 10% each year.
 - 1. Year 1
 - 2. Assigned to Executive Director

Goal IV Build an endowment of \$1,000,000 for the CP Foundation for long-term financial sustainability within five years.

- A. Implement a Capital Campaign to raise \$500,000 in five years.
 - 1. Year 1
 - 2. Assigned to CP Foundation
 - 3. Establish a committee
- B. Consider reducing annual Foundation support to Craik-Patton House by 2% of rolling three-year average for 3 years, if income from other sources can be increased.
 - 1. Year 2
 - 2. Assigned to CP Foundation, NSCDA-WV, and Craik-Patton, Inc.
- C. Develop a Planned Giving Program.
 - 1. Year 5
 - 2. Assigned to NSCDA-WV & CP Foundation
- D. Expand corporate sponsorships.
 - 1. Year 3
 - 2. Assigned to Campaign Committee for Foundation
- E. Form a “Dames Outside WV Society” to raise money for Craik-Patton House and the collection.
 - 1. Year 4
 - 2. Assign to NSCDA-WV
- F. Establish an Investment Committee
 - 1. Year 1
- G. Explore Glenwood Museum partnership
- H. Explore partnering with Boy Scouts benefactors and groups like Barnwood Builders.

Goal V Increase the number of grant applications by 20% each year.

- A. Expand the community, state and national organizations that support C-P.
 - 1. Year 5
 - 2. Assigned to Executive Director
- B. Provide training to the Executive Director for grant writing.
 - 1. Year 3
 - 2. Assigned to Craik-Patton, Inc. and Executive Director
- C. Hire a grant writer.
 - 1. Year 4
 - 2. Assigned to Craik-Patton, Inc.
- D. Seek museum accreditation by NSCDA
 - 1. Year 2
 - 2. Assigned to NSCDA-WV and Craik-Patton, Inc.

Goal VI Community Engage/Public Outreach to increase the visibility and awareness of the Craik-Patton House

- A. Establish a Publicity Committee to distribute Craik-Patton brochures, posters of events, etc.
- B. Promote uses of the house for private events (meetings, weddings, showers, etc.)
- C. Establish a Speakers Bureau of volunteers to make presentations to other community organizations to tell the Craik-Patton story.
- D. Increase the days open to the public.
- E. Extend and promote the Skype Tour across WV schools and to retirement communities and other organizations who may request it.
- F. Partner with the Boys Scouts for a grant to connect the two properties for program purposes.
 - 1. All above year 2-5
 - 2. Assigned to Craik-Patton, Inc.
- G. Partner with other like institutions for grants.
 - 1. Year 5
 - 2. Assign to Craik-Patton, Inc. Executive Director

Goal VII Plan solicitation letters and fundraisers so they do not interfere with each other

- A. NSCDA-WV prints the following yearly donations in their annual minutes and their summer newsletter. All donations must be received by May 31.
- B. Solicitations and fundraisers should be planned for the following months

September - Dumbarton House Solicitation Letter
 Craik-Patton House Cocktail Party Benefit

October -

November - NSCDA-WV Fundraiser held biennially

December - Craik-Patton House Foundation Solicitation Letter

January - Gunston Hall Solicitation Letter

February - Sulgrave Manor Solicitation Letter

March - NSCDA-WV Annual Campaign Solicitation Letter

April - Friends of Craik-Patton House Solicitation Letter

Goal VIII Develop a maintenance plan for Craik-Patton House, Ruffner Log Cabin, the Elms Well House and surrounding grounds.

- A. Establish a Maintenance Committee
- B. Develop a schedule for maintenance
- C. Establish a fund set aside for unexpected repairs, etc.
 - 1. Year 1/5
 - 2. Assigned to Craik-Patton, Inc. and the Executive Director