OSP 2018 - 2020 Strategic Plan

Board of Trustees Meeting January 23, 2018

We are the world’s window to the Okefenokee Swamp.
Our mission is to promote ecological tourism and education by providing a convenient point of entry into the Okefenokee - an authentic opportunity for the public to develop an appreciation for the wildlife, culture, and natural beauty of the “Land of the Trembling Earth”
Table of Contents

• Mission Statement
• Overview Phase I,II,III – slide 7
• SWOT Analysis – slide 8
• Phase One – slides 9-12
• Phase Two – slide 13-14
• Phase Three – slide 15
• Detailed Workplans – slides 18-20
Vision for OSP
Strategic Plan
2018-2020

We will differentiate ourselves
• By developing a long-range footprint that shapes an authentic yet uniquely accessible, comfortable and engaging experience that does not require outdoor experience, high physical exertion, a large time commitment, or investments in camping and hiking gear.
We will differentiate ourselves

- By delivering a one of a kind Okefenokee Swamp Park Environmental Education (OSP EE) to people of all ages, especially youth, enabling all to make knowledgeable decisions regarding the environment and bring solutions to the challenges confronting the relationship between humans, wildlife and the environment.
Vision for OSP
Strategic Plan
2018- 2020

We will differentiate ourselves
• By dedicating the time and resources to build life-long relationships and community with people and partner organizations who share our vision and values as they are integral to achieving our mission.
Overview

Phase I

- Growth Potential
  - SWOT Analysis
  - Capital Improvement Plan
  - Redefine Education Role
  - Audience Building Plan

Phase II

- Growth Blueprint
  - Operating Plan
  - Proformas and Targets
  - Benchmarks

Phase III

- Core Competencies
  - Impact Accounting
  - Unique Selling Proposition
  - Change Management
## SWOT Analysis – Staff, Board, Partner Input

### Strengths

**Resources:** Dedicated, skillful paid and volunteer staff team, interns, boats, train, habitats, boardwalks, Pioneer Village, Pavilion, wildlife cameras, wi-fi, park footprint, land for expansion, Christmas light show, plants, reptiles, alligators, Berryhill curriculum, Okefenokeology, archives, Native American and Swamp culture, Osprey Society, Board...

**Capabilities:** Operations

### Weaknesses

**Additional resources needed for**
- PR and Marketing
- Website design and SEO*
- Data collection and analysis
- Philanthropy

Need more intentional **entry sequence**

**Remote location** – off the beaten track

**Dated exhibits** need refreshing

**One and Done Mentality** – visitors need reasons to return and stay engaged

### Opportunities

**Expand partnerships:** with elementary, middle, high schools and universities, UGA Odum School of Ecology, **Educational programming:** Copyright Okefenokeology and Berryhill Curriculum

**Annual Membership:** Offer subscriptions

**Retail Sponsorships:** i.e. Trail camera retailer

**Grant Funding:** Research, Planning, Capital

**Workamping:** Expand to include shorter rotations and more specialty skills

### Threats

**Weather:** Fires, lack of water impact on attendance and revenue

**Deferred maintenance**

**Public perception:** dated, boring

**Talent Loss:** Tour guides aging, lack of succession planning and recording of oral histories of these “swampers”

**Emergency Response Plan:** Need more safety planning and risk management for serious injury, animal escape, bites, uninformed tourists

### Key Questions

**What does OSP do well?**

**What unique resources can OSP draw upon?**

**What do others see as OSP’s strengths?**

**What good opportunities are open to OSP?**

**What trends could OSP take advantage of?**

**How can OSP turn its strengths into opportunities?**

**What could OSP improve?**

**Where does OSP lack resources?**

**What are others likely to see as OSP’s weaknesses?**

**What could OSP improve?**

**Where does OSP lack resources?**

**What threats do OSP’s weaknesses expose it to?**

---

* SEO is search engine optimization; used to increase traffic to the website
Phase I: OSP Growth Potential

1. Commit to a Capital Improvement Plan (CIP)
   
   • Establish costs and priorities for key near-term improvements from LAS Concept B, defining the future footprint for entry and positioning/repurposing of key structures.
   
   • Replace property monument sign and treatment at entrance, relocate volunteer camp ground, install access control point, guardhouse and paved parking and install vegetative screen buffer.
   
   • Establish a multi-purpose controlled access point for the visitor center/gift shop and initial orientation to the guest experience including guided tour options, personal safety best practices, brochure and map dissemination, and ticket sales.
   
   • Identify best use of space and location for staff and research offices, and relocate.
   
   • Identify location, general space requirements and cost of new Berryhill Institute and Center for Okefenokee Studies, new American Alligator exhibit/building, and rebuilding dedicated classroom space.
   
   • Upgrade demonstration garden.
2. Commit to Refine and Expand OSP’s Education Role

- Extend the Berryhill curriculum, the emerging partnership with the UGA Odum School of Ecology, the archives, and the distance learning already in place.

- Place emphasis on growth in group ticket sales from elementary through high school, universities, and local and regional membership based clubs and organizations.

- Enhance the technology needed to increase the visibility of the park through the streaming of instructional videos, research and special events.

- Identify and pursue strategic partnerships that will enable OSP to stand out as a thought leader in the study of reptiles especially American alligators and snakes, biology and earth sciences and subspecialties like Okefenokeology, applied plant sciences, ecology, marine biology etc., with an initial projecting supporting long-term alligator tracking and research.
Phase I: OSP Growth Potential Cont’d.

3. Commit to Develop a Comprehensive Community-Building Strategy
   
   • Through innovative marketing, philanthropy, brand positioning and focus on mission, create a seamless experience across all channels which includes a roadmap for creative, advertising, digital & social, and in-park customer/donor experiences that build loyalty, traffic, and increase the resources to serve the OSP mission.

   • Focus on cultivating year-round relationships from a global community of followers through a variety of experiences to include return visits and online experiences.

   • Through connection with OSP, help people pursue their passion for outdoor education, wildlife photography, botany, ecotourism, marine biology, native American history, Swamp settlers, American alligators, Okefenokee heritage etc.
Phase I: OSP Growth Potential Cont’d.

4. Commit to Develop a Comprehensive Relationship-Building Strategy

- Move as many transactions as feasible to e-commerce to alleviate back up at ticketing and free-up staff time concentrating on superior guest experiences.
- Place a special emphasis on installing monitors and cameras to create content and a robust calendar of live and pre-recorded workshops on topics of interest to teachers, students and citizen explorers and scientists.
- Find funding for a comprehensive marketing/PR and fundraising campaign and ongoing annual brand building activities.
Phase II: Blueprint for Growth

1. Kickoff a Capital Improvement Plan (CIP)
   • Develop a multi-year revenue and expense model based on gate, gift shop, online and de novo revenue targets; set internal goals based on those targets
   • Develop preliminary cost analyses for entry sequence and Berryhill center, American Alligator Exhibit, classroom and related capital improvements
   • Prepare a prospectus on the OSP CIP
   • Begin discussions with philanthropic community for funding CIP and specific development efforts
   • Identify and work with benefactors and sponsors to prioritize development through funding commitments
   • Obtain $3M in near-term funding (immediate projects) over the next 12 months
Phase II: Blueprint for Growth (con’t)

2. Increase the Visibility of the OSP
   - Update/rewrite the website including a focus on sharing live video and classroom material
   - Install WiFi at the Fire Tower and immediately implement Nest Cams and Horizon Cams to increase accessibility of the park to our Community
   - Implement Alligator tracking system for both research purposes and promotion of interests with Community and media with the ability for gator tracking in real time
   - Promote the OSP as a credible authority on all things swamp with Georgia and North Florida media markets; Aggressively pursue media opportunities for the OSP to comment on issues central to the swamp, including promoting our UGA/Odom School partnership
Phase III: Organizational Changes Needed To Transform OSP’s Operations

Best practices need to be identified and implemented across the core team

• Benchmark against nearby organizations that possess the capabilities OSP needs
• Compare OSP processes to those of other best-in-class organizations
• Develop clear understanding of critical success factors
• Create a continuous improvement plan for each line of business
• Monitor progress, celebrate wins, invest in staff development
<table>
<thead>
<tr>
<th>PROPERTY</th>
<th>CONTRIBUTIONS</th>
<th>MARKETING/PR</th>
<th>IMPACT</th>
<th>HR</th>
</tr>
</thead>
</table>
| • Reacting to Aging Facilities  
  • Resource allocation based on what breaks and needs immediate fixing  
  • Osprey Society  
  • Other Direct Private Fundraising  
  • Transaction and or Event Oriented  
  • Reactionary  
  • Billboard, newspaper  
  • QR Codes, Facebook  
  • Attendance numbers  
  • Ticket Sales, website hits  
  • School visits, Camp enrollment  
  • Part and Full time staff, volunteer, interns  
  • Staff strained by multi-tasking  
  • Adhoc policies and procedures  
| • Proactive Facilities Management and Maintenance Program  
  • Strategic Resource allocation based on value and relevance  
  • Annual Fundraising Campaigns  
  • Phased Multi-year Capital Campaigns  
  • Planned Giving and Stewardship  
  • Private/Govt. Grants  
| • Focus on Relationship-Building  
  • Year Round Member/Donor Plans  
  • Automated and multi-channel  
  • The active face of the swamp  
  • Ospreenokee Certifications earned  
  • Classroom Hours Conducted  
  • New donors/members  
  • Prominence in the Community  
  • Supplement existing volunteer/interns with career-focused specialized FT employees  
  • More robust standard policies/procedures  
  • Increase sourcing from research institutions  
|
Initial Workplans

Phase I  Phase II  Phase III
### Initial Work Plan

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>DELIVERABLE</th>
<th>2017</th>
<th>Q3</th>
<th>Q4</th>
<th>2018</th>
<th>Q1</th>
<th>Q2</th>
<th>Q3</th>
<th>Q4</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Summarize recommendations, timeline and costs for an updated park footprint that promotes sustainable growth and relevance.</td>
<td>Wetlands impact analysis Lord Aeck Sargent Master Plan</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Okefenokeology Master Plan</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>UGA Partnership – Intern; MOU Odum School of Ecology</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Define Research Agenda</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Archives Master Plan</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Develop a master plan for OSP curriculum and instruction and further position OSP as a nonprofit thought leader that works collaboratively with local, state and regional educators.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Define how OSP wants to talk about the impact of its work to specific audiences.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Define an OSP visual identity package and style guide</td>
<td>Colors, typeface, trademarks, copyrights, maps, tickets, brochures, education materials, uniforms, personal safety best practices etc.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Initial Work Plan

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>DELIVERABLE</th>
<th>2017 Q1</th>
<th>2018 Q2</th>
<th>2018 Q3</th>
<th>2018 Q4</th>
<th>2019 Q1</th>
</tr>
</thead>
<tbody>
<tr>
<td>5. Develop audience building strategy that supports the selected operating plans</td>
<td>New Website and Analytics E-commerce and Mobile Plans Promotions, Pricing, Fundraising, Case Statement Marketing Calendar</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Update HR, safety and risk management policies and procedures</td>
<td>Documented procedures</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Expand “workamping” staffing plan and align with master plan ideas for volunteer campground, pioneer village, and lagoon amphitheater</td>
<td>Full year manpower plan</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Develop prospectus for CIP</td>
<td>Pro Forma 3-year revenue and expense plan (conservative, moderate and aggressive)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preliminary estimates on new construction/redevelopment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Initial Work Plan

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>DELIVERABLE</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>9. Raise $3M for near-term projects</td>
<td>Meet with philanthropic community and other funding sources</td>
<td></td>
<td>Q3</td>
<td>Q4</td>
</tr>
<tr>
<td></td>
<td>Agree on developments with funders to meet mutual needs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Install access point at tower</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Install Horizon and Nest Cams</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Promote through website, media outlets, etc.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. Establish OSP as a source of relevant swamp video</td>
<td>Agree on developments with funders to meet mutual needs</td>
<td></td>
<td>Q1</td>
<td>Q2</td>
</tr>
<tr>
<td></td>
<td>Install access point at tower</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Install Horizon and Nest Cams</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. Establish OSP as an authority on the Swamp, swamp life and culture</td>
<td>Agree on developments with funders to meet mutual needs</td>
<td></td>
<td>Q3</td>
<td>Q4</td>
</tr>
<tr>
<td></td>
<td>Install access point at tower</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Install Horizon and Nest Cams</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Q1:** First Quarter
- **Q2:** Second Quarter
- **Q3:** Third Quarter
- **Q4:** Fourth Quarter
Next Steps

• Board of Trustees approval of the Plan, January 2018

• Adjust, to the extent necessary, OSP operating plans and objectives to align with the Strategic Plan

• Commit to action
Thank You

Strategic Plan Committee Members: Chair - Jeff McCutcheon, Members – Russell Bates, Peggy Stovall, Betsy Lenahan