

Castle Preservation Society

STRATEGIC PLAN 2022 – 2026



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- Executive Director

Shannon Merrin

- Deputy Director

Dominic Albanese

- Director of Development Strategy

Debbi Finkelstein

- Director of Education & Partnerships

Robin Sherman

- Curator & Director of Preservation

Introduction

- While continuing to restore and maintain the buildings of the estate, this 2022-27 plan focuses on the part of our mission that encourages us to share and interpret the buildings and landscape for the benefit of the public.
- Current capacity constraints, the deteriorating condition of several ancillary property buildings, sub-par accessibility, and 100-year-old infrastructure detract from the current visitor experience
- To fully realize our mission, we must ensure that guests to the property have a positive experience, and create space for education and cultural programming.
- By achieving the goals set forth in this plan we will improve our visitor experience, and develop plans to better welcome visitors to Castle in the Clouds.
- This plan establishes goals in 5 strategic areas of focus: Financial Health, Governance, Facilities, Education/Interpretation, and Arts & Partnerships.

Mission, Vision, Values

Mission

Preserve, interpret, and share the buildings and grounds of Castle in the Clouds as a cultural and educational resource for the benefit of the public.

Vision

Castle in the Clouds will be a premier historic, natural, and cultural resource.



Mission, Vision, Values

Values

- *Integrity* – Our work is grounded in honesty, transparency, and a commitment to professionalism and ethical behavior: we present historical information that is accurate and well researched.
- *Collaboration* – Open communication and teamwork are essential to our success, and we seek out partnerships that enhance and expand our impact.
- *Community* – Our organization brings together visitors, staff, volunteers, donors and partners from all walks of life: we strive to make Castle in the Clouds as accessible and inclusive as possible.
- *Improvement* – Through hard work and adaptability we are constantly looking for new ways to engage our audiences and provide them the highest quality experience in all that we do.
- *Sustainability* – We protect the Lucknow Estate by being financially responsible, minimizing our impact on the environment, and ensuring faithful preservation of the buildings and grounds entrusted to our care.

Strategic Areas of Focus

1. Strengthen CPS Financial Health
2. Ensure Stability Through Effective Governance
3. Improve Facilities For Visitor Experience
4. Expand Educational Offerings
5. Integrate Arts & Develop Partnerships

Finances

- Enhance fundraising to support restoration, capital improvements, and strategic goals
- Expand earned income from current revenue generating operations
- Develop new sources of revenue consistent with our mission, vision, and values
- Create and grow reserve funds to support future endeavors
- Plan for a capital campaign around significant facilities investments

Governance

- Periodically review mission, vision, and values of the organization
- Establish long-range succession planning for staff, committees, and the board
- Create and implement a Board development plan and skills matrix
- Develop and implement DEAI policies and training
- Board focus on strategy and building relationships in the community
- Regularly measure and evaluate progress toward strategic goals

Facilities

- Adopt and implement a Facilities Master Plan for the organization
- Continue historic restoration and preservation
- Plan for and conduct repairs and improvements to facilities infrastructure
- Plan for and implement new facilities investments that support the mission and vision

Education

- Adopt and implement an organizational Interpretive Plan
- Establish advisory groups to assist with school and public program development
- Create diverse outreach opportunities for school-age children
- Expand public programming to meet community needs and interest and regularly measure and evaluate program performance
- Seek support from grant makers and government programs in support of educational goals

Arts & Partnerships

- Integrate the arts across the Castle property
- Expand and strengthen current key partnerships with LRCT and Great Waters
- Identify and pursue new partnership opportunities consistent with our mission, vision, and values



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