

French & Indian War Foundation



STRATEGIC PLAN

April 24, 2022

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Introduction

The mission of the French & Indian War Foundation is, *to preserve and interpret the colonial history of Virginia's frontier*. The focus of the Foundation's activities has been on increasing public awareness of the role that the French & Indian War played in the development of the Virginia backcountry and the subsequent founding of our country.

The long-term vision of the Foundation is to be a financially stable and growing organization known locally, regionally, and nationally for its accurate and innovative interpretation of the French & Indian War, life during that period (1753-1763) and the early career of George Washington, through public programming and scholarship.

This Strategic Plan outlines a series of recommendations to achieve that vision, by focusing on three themes and visions for those themes.

Theme	Vision
Organizational Sustainability	The Foundation is a robust and growing organization positioned for long-term financial stability.
Public Outreach & Education	The Foundation is a recognized expert on the French & Indian War, life during that period and the early career of George Washington, through its quality events, education programs and scholarship.
Physical Assets	The Fort Loudoun site is the basis for interpretation of the French & Indian War period on Virginia's frontier.

These three themes are connected and interdependent. For example, without the resources that will come from organizational sustainability, efforts in public outreach and education will not be possible. Within each theme, recommended action items are divided into short-term, intermediate, and long-term steps. The short-term is defined as the next 1 - 24 months. Intermediate is 25 – 60 months. Long-term is 61 months plus.

The board of directors will use this report and its recommendations for a near-term program of work and will revise the short, intermediate, and long-term action items as necessary to keep the organization moving towards its long-term vision.

Challenges Facing the Foundation

The immediate challenges facing the Foundation are visibility within the historical community and the loan on the Baker-Hardy House which impedes site development.

As a small non-profit organization, the French & Indian War Foundation faces competition from other local and regional historical groups. With the significant role that Winchester had in the American Civil War, the French & Indian War is often overlooked. The Foundation must continue to raise the organization's visibility and promote interest and support from a broader constituency.

The second challenge facing the Foundation is financial. The Foundation owns the Baker-Hardy House on North Loudoun Street in Winchester's historic district. The Baker-Hardy House was constructed in the late 1830's on the site of Fort Loudoun, Colonel George Washington's regimental headquarters during the French & Indian War. The Foundation has an out-standing loan on the property. Primarily due to the loan, the Foundation operates the Baker-Hardy House as a residential rental property, which covers the loan and expenses. This loan impedes progress towards long-term Foundation goals.

Theme 1: Organizational Sustainability

Summary

Functional areas of the Foundation that fall under this theme are membership, volunteers and fundraising. Currently, the Foundation has maintained a consistent membership and an active board of directors. One of the most pressing challenges facing the organization is the loan on the Baker-Hardy House. Since its inception, the Foundation has relied primarily on membership dues, donations and funds raised from various programs. The Foundation has received federal funding, grants, and gifts, applied towards the purchase of the Baker-Hardy House.

The Foundation needs to increase its membership, focus on fundraising efforts, and develop an active volunteer program.

Recommendations

Short Term

- ◆ Continue Yearly Solicitation of Donations, Grants, & Continued Support
 - Direct Mail campaigns
 - Fundraising Activities
 - Grant submissions to support programs (ex. Fort Loudoun Day, printed materials, displays, signage, children's activities) and projects (ex. exploratory activities to support future site plans).

- ◆ Establish Volunteer Orientation & Training Programs
 - The orientation program would include clearly defined volunteer opportunities, to help organize Fort Loudoun Day and other events, make presentations to school groups, visit businesses to request sponsorships, etc.

- ◆ Establish Docent Program - Finalize Docent Booklet

Intermediate

- ◆ Develop Corporate Sponsorship Program

The Foundation should begin actively seeking sponsors from the Winchester-Frederick County area. A sponsor package should include:

- Cover Letter – Executive Summary
- A summary of the organization outlining accomplishments, long-term goals and current program of work
- Current year budget - Upon request
- List of board of directors
- Clearly defined benefits of sponsorship to the business

Once the package is developed, the Foundation should identify the top employers in the Winchester area and approach local executives with personal requests for sponsorship. This effort will take background research on the businesses, to understand their corporate giving programs and how decisions are made.

◆ Identify Grant Opportunities

With a Strategic Plan in place, the Foundation should continue to actively pursue grant funding. The Foundation should investigate local organizations that may offer access to grant databases such as Shenandoah University or the Community Foundation of the Northern Shenandoah Valley with a goal of identifying and applying for grants. The information developed for the corporate sponsorship package can be repurposed for grant applications.

Long Term

◆ Develop Tiered membership Program

Under the present membership program, all members receive the same benefits, regardless of the level of giving. The Foundation should develop a program with different levels of membership.

◆ Hire Executive director and/or Development Officer

- Continued growth may require having paid staff, reporting to the board, to manage the organization, including activities such as: Manage Grant Programs, Fundraising efforts, Events Planning and Site Management.

Theme 2: Public Outreach & Education

Summary

Public outreach and education are the areas where the Foundation has the most opportunities. The Foundation's public outreach and educational programming is currently centered around these annual events:

- Fort Loudoun Day

- George Washington’s Birthday Celebration
- President’s Day Muster
- George Washington’s Election to House of Burgesses
- Tours
- Annual Meeting and Awards Program

The Foundation needs to build upon these events and add education resources that the public can access.

Recommendations

Short Term

- ◆ Investigate Participation in the Apple Blossom Festival and Other Local Events.
- ◆ Continue Website Improvement
 - Improve search engine optimization (SEO).
 - Expand Website Audience
 - Develop Website reciprocity among similar organizations
- ◆ Strengthen Existing Events

The Foundation should work on strengthening its established events and building audiences for them.

- Dates for the annual events should be set two to three years in advance, with appropriate information available on the website.
- Explore ways to expand events with exclusive “members only” components that increase the value of membership.
- Seek corporate sponsorships for events.
- ◆ Maintain or Expand Visitor Center Display and Brochures
- ◆ Build new alliances and cross-promotional opportunities by developing relationships with similar organizations

Keep in communication with our regional peers. Add addresses of former FFA organizations to our courtesy mailing list.

Intermediate

- ◆ Develop a Lecture Series
 - Develop sponsors
 - Develop a speakers list
- ◆ Expand Site Tours to include more components
 - Frontier Life
 - Military presence

- Colonial Politics
 - Native Interactions
 - Site Archeology
- ◆ Investigate Reviving Currently Inactive Frontier Forts Association (FFA)
 - ◆ Develop Educational Video(s) that could be used by Reenactors, Local Theaters, and Internet Sites.

Long Term

- ◆ Develop Lesson Plans Tied to Virginia SOLs

Working within the three themes of the Foundation’s educational programming (the French & Indian War, life during that period and the early career of George Washington), the Foundation could develop lesson plans that are tied to the Virginia Standards of Learning and offer these lesson plans to teachers for free on the website.

Theme 3: Physical Assets

Summary

The focus of the Foundation is to preserve and document the footprint of Fort Loudoun located within the City of Winchester’s Historic district. The Foundation owns the portion of the Fort site on which the Baker-Hardy House sits while most of the fort’s location is either in the nearby public rights-of-way or is privately-owned. A challenge to interpretation of the site is the lack of visible evidence of the fort.

At the present time the Foundation operates the Baker-Hardy House as a residential rental property which is necessary to make the loan payments. When the loan is retired, other uses of the property will be implemented.

Recommendations

Short Term

- ◆ Develop Detailed Fort Loudoun Site Plan

The Foundation needs to have a clear vision of the long-term development and use of the Fort Loudoun site. Scenarios and alternatives to be explored may include, but are not limited to, the list below. Feasibility studies would be performed and documented, where deemed appropriate by the Board. Plan would include implementation phasing, priorities, budget, and progression/timeline for projects. Plan would be “evergreen”, with revisions made based on priorities and funding, with approval by the Board.

- Leaving the Baker-Hardy House intact as an ‘Interpretive Center ‘
- Determine interior use and modifications to the Baker-Hardy House

- Restoring the Baker-Hardy House to its original late 1830's appearance
- Removing the house, in part or total, and reconstructing elements of the fort, either literally or conceptually.
- Rebuilding a Barrack, NW Bastion, Cut-away section of the West Curtain Wall under construction
- Well site exploration, preservation & interpretation
 - Interpretive signage - Signage examples include, but not limited to:
 - Kiosk to explain 'Why the Fort was Needed '
 - Well signage

◆ Conduct Exploratory and Archaeological Investigations

In the absence of the ability to undertake a major redevelopment of the Fort Loudoun site, the Foundation should explore opportunities to conduct exploratory and further archaeological investigations, both on the Baker-Hardy House property and on adjacent properties to support development and execution of Site Plan.

- Perform Ground Penetrating Radar exploration of the site
- Dig Test holes across site as needed
- Hosting an archaeology field school on the Baker-Hardy House property
- Work with City of Winchester to ensure that, if any new construction is proposed within the footprint of Fort Loudoun, the possibility of archaeological investigations is discussed with the property owners.

Intermediate

◆ Install Fort Loudoun Boundary Identification Markers/Signs

To improve public visibility of the Fort Loudoun site, the Foundation should approach the City of Winchester and the adjacent property owners about ways to install markers that identify the boundaries of the fort.

- ◆ Continue Exploratory and Archaeological Investigations (see Short Term recommendation)
- ◆ Continue Planning and Commence Implementation of the Fort Loudoun Site Plan Activities
- ◆ Erect, modify and/or construct interior and exterior signage, displays, fort reconstruction projects, etc., as allowed by current rental situation.

Long Term

- ◆ Continue Implementation of the Fort Loudoun Site Plan Activities
- ◆ Work with Neighboring Properties

The Foundation should consider extending its footprint over the former site of Fort Loudoun and may wish to acquire additional properties within the fort's footprint, as they become available. The Foundation should explore opportunities to work with neighboring property owners to place protective easements on their properties.

French & Indian War Foundation

Strategic Plan Matrix

Focus Area	Action Items			Vision
	Short Term	Intermediate	Long Term	
Organizational Sustainability	<ul style="list-style-type: none"> • Continue Solicitation of Donations, Grants, & Continued Support • Establish Volunteer Orientation & Training Programs • Establish Docent Program 	<ul style="list-style-type: none"> • Develop Corporate Sponsorship Program • Identify Grant Opportunities 	<ul style="list-style-type: none"> • Develop Tiered Membership Program • Hire Executive Director / Development Officer 	The Foundation is a robust organization positioned for long-term financial stability.
Public Outreach & Education	<ul style="list-style-type: none"> • Investigate Participation in Apple Blossom & Other Local Events • Continue Website Improvement • Strengthen Existing Events • Maintain/Expand Visitor Center Display/Brochures • Build New Alliances and Cross-Promotional Opportunities 	<ul style="list-style-type: none"> • Develop Lecture Series • Expand Tours • Investigate Reviving Frontier Forts Association • Develop Educational Video(s) 	<ul style="list-style-type: none"> • Develop Lesson Plans Tied to Virginia SOLs 	The Foundation is a recognized expert on the French & Indian War, life during the period and the early career of George Washington, through its quality events, educational programs, and scholarship.
Physical Assets	<ul style="list-style-type: none"> • Develop Detailed Fort Loudoun Site Plan • Conduct Exploratory and Archaeological Investigations 	<ul style="list-style-type: none"> • Install Fort Loudoun Boundary Identification Markers/Signs • Conduct Exploratory and Archaeological Investigations • Continue Implementation of the Fort Loudoun Site Plan Activities 	<ul style="list-style-type: none"> • Continue Implementation of the Fort Loudoun Site Plan Activities • Work with Neighboring Properties 	The Fort Loudoun site is the basis for interpretation of the French & Indian War period in Virginia's backcountry.