

# **Strategic Business Plan for Chesapeake Heritage Conservancy, Inc.**

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This document comprises a strategic plan for Chesapeake Heritage Conservancy (CHC), Inc., a 501(c), non-profit, corporation, that was formed in 1994. It presents a series of fundamental statements relating to CHC's vision, mission, values and objectives; and sets out CHC's proposed strategies, goals and action programs. Additionally, it reviews its strengths, weaknesses, threats, and opportunities.

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## **Vision**

The Chesapeake Heritage Conservancy connects the community with the unique history of the Chesapeake Bay, serving as a guardian of the past, while providing education and preservation for the present and future.

## **Mission Statement**

The Chesapeake Heritage Conservancy will inspire knowledgeable and responsible stewards of the Chesapeake Bay through land-based and water-based educational and recreational programs for all ages. We will strive to preserve and promote vessels and artifacts that showcase the history, culture, and ecology of the Chesapeake Bay.

## **Corporate Values**

The corporate values governing Chesapeake Heritage Conservancy's development will include the following:

- Working cooperatively with the community, including local businesses, schools and non-profits organizations.
- Maintaining the highest quality of educational services to the community.
- Supporting the preservation and protection of the Chesapeake Bay, its vessels, and antiquities .
- Practicing encouraging and enhancing ecological safekeeping of the Chesapeake Bay..

## **Organization**

### **Board of Trustees**

The Board of Trustees is made up of at least three (3) and up to 15 members. The Board of Trustees serves as the legislative body of the corporation. The Board establishes priorities, initiates proposals, policies, programs, and procedures for the Corporation. The current members of the Board of Trustees include:

Dr. Robert Gell, President  
Carol Deel, Secretary  
Kimie Ranken  
Lawrence Metz  
Helene Klair

R. Madison Mitchell, Jr., Vice President  
Cynthia Beane, Treasurer  
Rebecca Hicks  
Karl Fockler, Esq.  
Sarah Colenda

### **Executive Director:**

Cynthia Beane

## **Advertising/Promotion Plan**

We communicate with our target audience by way of our website [www.chesapeake-heritage.org](http://www.chesapeake-heritage.org), press releases, email list, newspapers, television, social media and the Internet. When items of interest come about, we send out press releases, as well as, publish on our FaceBook page. In all of our advertisements we utilize our website. We maintain an email list of supporters and keep regular contact with our constituents and patrons.

## **Financial Plan**

As a part of our financial plan, we rely on income from daily private and public, and educational and recreational charters, both pr, grants, sponsorships and donations from corporations, state, local and municipal governments and private citizens. All revenues are utilized to maintain the Martha Lewis, operate the programs, and fulfill our our Mission.

## **Business Objectives**

Long term business objectives of Chesapeake Heritage Conservancy are summarized as:

- Be financially self-sufficient.

- Customer satisfaction.
- Educational and inspirational programs.
- Take a minimum of [put # here] passengers on educational adventures.
- Visit classrooms with *Meaningful Watershed/Bay Experience*
- Take students on *Discovery Bay Studies* cruises, *Discovery History Hunter* cruises, and *Discovery Bay Patrol* cruises.

## **Key Strategies**

The following critical strategies will be pursued by Chesapeake Heritage Conservancy:

- Communication strategies will include promotions, advertising, public relations, printed material, Internet, email lists, and the corporate website.
- Financial strategies will include fundraising, selling cruises to public, private and school programs, both public and private donations from corporations, private citizens, municipalities such as the City of Havre de Grace and Harford and Cecil County County Governments, and sponsorships.
- Sales strategies include contact with the public and private school systems throughout the State of Maryland to offer cruise and educational opportunities to their students.

## **Major Goals**

The following key targets will be achieved by Chesapeake Heritage Conservancy over the next 3-4 years:

1. Increase the number of paying passengers on the SKIPJACK MARTHA LEWIS.
2. Increase the land-based programs currently being offered with the Discovery Traveler, a mobile classroom.
3. Increase visibility of the Chesapeake Heritage Conservancy.
4. Maintain the integrity and seaworthiness of the SKIPJACK MARTHA LEWIS.
5. Repay the current debt and outstanding loans.
6. Stay current with patrons, contacts and interested parties through electronic media .
7. Increase and maintain membership.
8. Increase and maintain volunteer.

## **Strategic Action Plan**

The following strategic action plan will be implemented:

- 1) Increase the number of paying passengers on the SKIPJACK MARTHA LEWIS.
  - a) Offer broader range of public and private Cruises.
  - b) Expand school based programs.
- 2) Increase the land-based programs currently being offered with the Discovery Traveler
  - a) Expand school based traveling program utilizing the Discovery Traveler
  - b) Travel to event, festivals, etc. with the Discovery Traveler.
- 3) Increase visibility of the Chesapeake Heritage Conservancy.
  - a) Enhance public relations campaign including radio, television, e-programing, and promotional cruises.
- 4) Maintain the integrity and seaworthiness of the MARTHA LEWIS..
  - a) Maintain yearly Coast Guard inspections.
  - b) Implement volunteer vessel maintenance days.
- 5) Repay the current debt and outstanding loans.
  - a) Solicit funds from Harford and Cecil County Government and the City of Havre de Grace and Towns of Perryville, Charlestown and North East.
  - b) Implement, Establish and Promote an Endowment Fund
- 6) Stay current with electronic media to increase contacts with interested parties as well as with current constituent base.
  - a) Utilize social media and its successor to gain new members and volunteers and to keep in touch with those who are currently active
  - b) Maintain and update the webpage as new technology becomes available.
- 7) Increase and maintain membership.
  - a) Increase CHC, Inc.'s media exposure
  - b) Increase incentives to join the CHC, Inc.
- 8) Increase and maintain volunteer.
  - a) Advertise for volunteers in boating magazines specifically targeted to wooden boat enthusiasts and Chesapeake Bay history lovers.

- b) Target a media blitz to marinas who focus on older boats as well as wooden boats.

## **Strengths, Weaknesses, Threats & Opportunities**

This strategic plan addresses the following key strengths, weaknesses, threats and opportunities which apply to CHC now and in the foreseeable future:

### **Strengths:**

- Historical value
- Hands on and Educational learning
- 20 years of Upper Bay education
- Website & Marketing
- Excitement in community
- Unique and fun activity
- Skipjack is Maryland's State boat
- Promotes good stewardship of the Bay

### **Threats:**

- Economy: lack of discretionary dollars and uncertainty
- Current Volunteer Base is aging
- Lack of Endowment Fund
- Diminishing school and corporate budgets.
- Competition

### **Weaknesses:**

- High maintenance costs
- Need dedicated and reliable educators & volunteers
- Need qualified Administrative staff and crew
- Need increased revenue
- Need steady rate of passengers/cruises

### **Opportunities:**

- New technology to expand marketing/sales/increase revenue
- Offer more land-based programs
- Bring field trip to the students with traveling classroom
- Continued interest in preserving the bay and History.
- Sailing is fun and (can be) relaxing
- Renew interest in the next generation
- Amazing scenery on the water