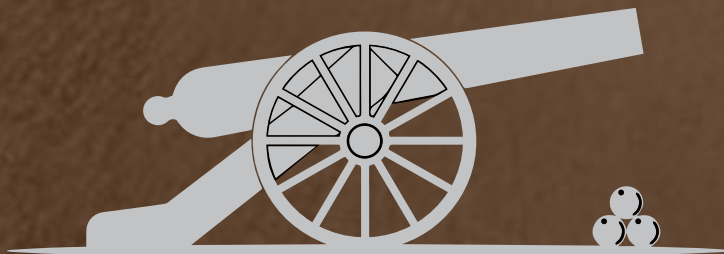




Fort Adams Trust **Strategic Plan**

2024



FORT ADAMS

MISSION

To preserve and revitalize historic Fort Adams for the public's benefit.



VISION

To be a valued, open, accessible historic destination that anchors our community.



NORTH STAR

To historically restore and open the whole Fort for the public.

TAG LINES

One Block At A Time.

Block by Block and/or Brick by Brick

Help us rebuild the Fort – One block at a time!



GUIDING PRINCIPLES

Accessibility

Maintain the fort as an open, welcoming public asset in perpetuity.

Community

To grow and foster a sense of pride and commitment through education, programming, and outreach.

Preservation

Restore, protect and preserve the fort's structure, authenticity, and character.

Stewardship

Responsible care, engagement, and management, upholding the mission and vision of the Trust.

Resilience

Adapting to modern challenges while safeguarding historic structures in the face of environmental, economic, and societal changes.

Transparency

Maintain open communication, accountability, and clarity of purpose to foster trusted and supportive engagement.

Appreciation/Care

Prioritize Fort Adams by fostering a culture of respect and stewardship, ensuring that both its internal and external community are valued and celebrated.



GOALS

1. Fort Preservation and Site Enhancement

Fort Adams will be restored, usable, accessible, well maintained, and safe.

2. Community Programs and Visitor Engagement

Our programs and services will benefit and engage the community in advancing the mission of the Fort.

3. Collaborative Engagement and Advocacy

We will engage with local community and strategic partners to foster collaboration and advocacy efforts, to create opportunities ensuring a united approach to preserving and enhancing the historic fort for future generations.

4. Brand Awareness and Community Visibility

Fort Adams will be recognized locally, regionally, and nationally as a valued, open, accessible destination that is a pivotal part of its related communities.

5. Sustainable Funding and Resource Development

We will be a sustainable and thriving organization with ample funds for capital improvements.

6. Operational Excellence and Team Empowerment

We will have the organizational culture, staff, structure, governance, technology, operations, and practices that ensure we reach our goals and financial stability.



GOAL 1

1. Fort Preservation and Site Enhancement

Fort Adams will be restored, usable, accessible, well maintained, and safe.

OBJECTIVES

MEASURE (yardstick)	1 YEAR	2 YEAR	3-5 YEAR
Prioritize restoration projects	<i>Identify and update</i>	<i>Complete 1 project</i>	<i>Complete 3-5 projects</i>
Increase preservation funding	<i>\$50,000</i>	<i>Increase 500%</i>	<i>Increase 100%</i>
Enhance safety standards	<i>Draft safety assessment</i>	<i>Complete safety assessment and implement 10%</i>	<i>Implement 75%</i>
Expand visitor accessibility	<i>Open 1 new area</i>	<i>Open 1 new area</i>	<i>Open 2 new areas</i>
Develop a facilities maintenance plan	<i>Develop comprehensive preventive plan</i>	<i>Implement 25%</i>	<i>Implement 75%</i>



GOAL 1

1. Fort Preservation and Site Enhancement

Fort Adams will be restored, usable, accessible, well maintained, and safe.

Strategies

1. Prioritize restoration projects

- Conduct a detailed structural assessment of the Fort to prioritize restoration needs based on urgency, historical significance, and visitor impact.
- Develop a project timeline with milestones, assigning specific teams or contractors to each restoration area, ensuring continuous progress.
- Partner with local historical preservation experts to ensure restoration methods meet the highest standards while maintaining historical integrity.

2. Increase preservation funding

- Launch a dedicated restoration fundraising campaign, with targeted appeals to high-net-worth donors, historical preservation enthusiasts, and local businesses.
- Apply for preservation-specific grants from national, state, and local funding agencies, ensuring proposals emphasize the historical and community significance of Fort Adams.
- Offer donor recognition opportunities for key areas or projects, exclusive tours, and public acknowledgment in restoration updates and events.

3. Enhance safety standards

- *Conduct a safety audit of all high-traffic visitor areas (e.g., stairways, corridors, and outdoor pathways) to identify critical upgrades such as additional lighting, railings, or non-slip surfaces.*
- *Work with local contractors to install new safety features, ensuring all updates comply with modern safety codes and standards.*



GOAL 1

1. Fort Preservation and Site Enhancement

Fort Adams will be restored, usable, accessible, well maintained, and safe.

4. Expand visitor accessibility

- *Identify the one to three most historically significant but currently restricted areas of the fort that can be made safe for visitors through structural reinforcement or path enhancements.*
- *Secure funding or grants to cover the cost of making these areas accessible, potentially partnering with local accessibility-focused organizations.*
- *Promote the expanded access areas through marketing campaigns to attract more visitors and offer exclusive tours for donors who contributed to these efforts.*



5. Develop a facilities maintenance plan

- *Create a detailed preventive maintenance schedule for all key structures, including annual inspections, routine cleaning, and small-scale repairs.*
- *Hire or contract a dedicated facilities manager to oversee the implementation of the maintenance plan and coordinate with external vendors as needed.*
- *Establish an emergency fund specifically for unanticipated repair needs, ensuring that any urgent issues can be addressed quickly to prevent further damage.*



GOAL 2

2. Community Programs and Visitor Engagement

Our programs and services will benefit and engage the community in advancing the mission of the Fort.

OBJECTIVES

MEASURE (yardstick)	1 YEAR	2 YEAR	3-5 YEAR
Increase number of people visiting/using the Fort	250,000	25% increase	100% increase over year 1
Strengthen community engagement	Build plan	Increase participation by 25%	By 50%
Improve program accessibility	Develop idea	Complete safety assessment and implement 10%	Increase participation in those initiatives by 25%
Evaluate and improve programs and impact	Establish system to measure feedback	Collect feedback from 70% of participants	Increase participation by 50%
Enhance visitor experience	Develop plan	Initiate 2 programs	Open 2 new areas
Develop/expand educational programs	Develop plan	Initiate plan	Continued progress



GOAL 2

2. Community Programs and Visitor Engagement

Our programs and services will benefit and engage the community in advancing the mission of the Fort.

Strategies

1. Increase number of people visiting/using the Fort. *See below, but*

including and not limited to:

- Expand programming
- Enhance marketing and online presence
- Develop partnerships and collaborations
- Improve visitor experience and accessibility
- Leverage technology
- Engage community



2. Strengthen community engagement

- Leverage the marketing team to develop and implement a targeted outreach strategy, increasing local awareness and participation in Fort Adams events and programs by 30% within the next year.
- Create partnerships with local community centers, libraries, and social service organizations to co-promote Fort Adams events and offer free or discounted admission to low-income families and underserved populations.
- Host community-focused events like open houses, neighborhood nights, or free days that are specifically designed to welcome local residents and build ongoing relationships.



GOAL 2

2. Community Programs and Visitor Engagement

Our programs and services will benefit and engage the community in advancing the mission of the Fort.

3. Improve program accessibility

- Implement initiatives that make Fort Adams programs and events more accessible to broader demographics (including low-income, youth, and elderly visitors), increasing participation by 25% within the next year.
- Increase online engagement by 40% over the next 12 months by expanding digital marketing efforts, including social media campaigns, on-line event listings, and collaborations with local influencers.
- Develop at least two new family-friendly or youth-oriented events (e.g., educational programs, interactive tours, or adventure days) within the next 18 months, aiming to increase family attendance by 20%.
- Form partnerships with at least three local organizations (e.g., schools, community centers, social clubs) to co-host or promote events, aiming to attract a more diverse audience and increase overall attendance by 20%.



4. Evaluate and improve programs and impact

- Design simple yet effective post-program surveys to capture participant feedback on content, delivery, and overall experience, ensuring a response rate of at least 70%.



GOAL 2

2. Community Programs and Visitor Engagement

Our programs and services will benefit and engage the community in advancing the mission of the Fort.

- Implement an online feedback system that collects input from visitors about what additional programs or improvements they would like to see, and use this data to inform future offerings.
- Review feedback data quarterly and use key insights to make continuous improvements to existing programs, adding new content or adjusting formats based on participant preferences and needs.

5. Expand educational programs

- Collaborate with local schools, universities, and organizations to develop programs that align with their curriculum and areas of interest.
- Offer specialized workshops or field trips that focus on the fort's military history, architectural significance, or surrounding ecology, integrating hands-on activities to engage students.
- Develop marketing materials targeting teachers and educational coordinators, highlighting the educational value and alignment with state or national education standards.

6. Enhance visitor experiences

- Partner with digital and technology experts to create an immersive historical tour using augmented reality (AR) or virtual reality (VR) elements, bringing the fort's past to life for visitors.
- Develop themed tours or seasonal experiences (e.g., haunted tours, living history weekends, or re-enactments) that provide unique, immersive experiences for different types of visitors.
- Promote these new experiences through targeted advertising, partnering with travel blogs, social media influencers, and local tourism boards.



GOAL 3

3. Collaborative Engagement and Advocacy

We will engage with local community and strategic partners to foster collaboration and advocacy efforts, to create opportunities ensuring a united approach to preserving and enhancing the historic fort for future generations.

OBJECTIVES

MEASURE (yardstick)	1 YEAR	2 YEAR	3-5 YEAR
Increase community participation	10%	15%	30%
Expand and sustain partnerships	1 new partner	5 new partners	10 new partners
Strengthen advocacy efforts	1 campaign	2 campaign	3 campaigns
Boost volunteer engagement	Recruit 50 new active volunteers	Recruit and sustain 50 active volunteers	Recruit and sustain 75 active volunteers
Increase grant and funding opportunities	2 grants	4 grants	10 grants
Enhance communication channels	Increase communication engagement and subscriber base by 25%	Increase by 50%	Increase by 50%



GOAL 3

3. Collaborative Engagement and Advocacy

We will engage with local community and strategic partners to foster collaboration and advocacy efforts, to create opportunities ensuring a united approach to preserving and enhancing the historic fort for future generations.

Strategies

1. Increase community participation

- Host community-focused events at a regular cadence such as tours, family days, and cultural festivals and community events to attract a diverse audience.
- Partner with local schools and nonprofits to offer field trips and hands-on history programs, integrating Fort Adams into local education.
- Implement a social media outreach campaign highlighting community members' stories, testimonials, and personal connections to Fort Adams.

2. Expand partnerships

- Identify and target potential partners (e.g., local universities, cultural organizations, outdoor recreation groups, non-profits) to develop co-sponsored events and joint programs.
- Attend local business, non-profit, and government networking events to build relationships and explore collaborative opportunities.
- Offer discounted or co-branded events with partners, where mutual marketing and shared resources can enhance visibility and attendance.



GOAL 3

3. Collaborative Engagement and Advocacy

We will engage with local community and strategic partners to foster collaboration and advocacy efforts, to create opportunities ensuring a united approach to preserving and enhancing the historic fort for future generations.

3. Strengthen advocacy efforts

- Develop an advocacy agenda with attainable goals.
- Join and partner with related organizations (chamber of commerce, visiting bureaus, outdoor recreation, public lands) to advocate for increased awareness and funding.
- Partner with local media outlets and community leaders to promote Fort Adams' significance, focusing on legislative and community advocacy for historic preservation.

4. Boost volunteer engagement

- Launch a targeted volunteer recruitment campaign across social media, local community centers, and schools, offering unique incentives such as free admission to events, Fort Adams merchandise, or exclusive behind-the-scenes tours.
- Develop a structured volunteer program that includes regular recognition events, training opportunities, and leadership roles to enhance volunteer retention.
- Collaborate with corporate partners for volunteer days, encouraging businesses to engage their employees in restoration or event support efforts at the fort.

5. Increase grant and funding opportunities

- Research and apply for preservation and educational grants from local, state, and national organizations.
- Cultivate relationships with corporate sponsors by presenting a clear value proposition that includes visibility and participation in major Fort Adams events.
- Create a donor recognition program to incentivize high-level individual contributions.



GOAL 3

3. Collaborative Engagement and Advocacy

We will engage with local community and strategic partners to foster collaboration and advocacy efforts, to create opportunities ensuring a united approach to preserving and enhancing the historic fort for future generations.

6. Enhance communication channels

- Use an email marketing platform to automate the distribution of newsletters and track engagement metrics, adjusting content based on subscriber preferences.
- Develop a dynamic website section that highlights ongoing projects, advocacy updates, and upcoming events, making it easy for visitors to subscribe to updates and engage with the Trust.
- Host annual meeting (in-person and virtual) where community members can ask questions, share ideas, and get updates directly from Fort Adams leadership, increasing transparency and dialogue.



GOAL 4

4. Brand Awareness and Community Visibility

Fort Adams will be recognized locally, regionally, and nationally as a valued, open, accessible destination that is a pivotal part of its related communities.

OBJECTIVES

MEASURE (yardstick)	1 YEAR	2 YEAR	3-5 YEAR
Develop strong brand identity: - website hits - 55K/year - media mentions - 2 - Facebook - 5.3K - Instagram - 3.8K - Email subscribers - 4.7K	<i>Increase:</i> - Social: 50%; - web traffic by 30%; - email subscribers by 25%	<i>Increase an additional:</i> - Social: 50%; - web traffic by 30%; - email subscribers by 25%	<i>Increase an additional:</i> - Social: 50%; - web traffic by 30%; - email subscribers by 25%
Expand media coverage and partnerships	<i>Build a communications framework</i>	<i>Secure 5 media features</i>	<i>Annually secure 5 media features</i>
Improve visitor conversion and marketing efforts	<i>Build strategy</i>	<i>Improve conversion rate by 15%</i>	<i>Improve conversion rate by 15%</i>
Enhance brand recognition locally	<i>Establish baseline</i>	<i>Double number</i>	<i>Quadruple number</i>
Develop a content strategy	<i>Build a strategic content strategy</i>	<i>Increase engagement by 20%</i>	<i>Increase engagement by 30%</i>



GOAL 4

4. Brand Awareness and Community Visibility

Fort Adams will be recognized locally, regionally, and nationally as a valued, open, accessible destination that is a pivotal part of its related communities.

Strategies

1. **Develop a strong brand identity**

- Develop a brand identity that highlights the fort's unique historical significance and cultural offerings, attracting diverse audiences and increasing visitor numbers, sponsorships, public/private partnerships.
- Create a social media content calendar with regular posts (daily/weekly) across platforms like Instagram, Facebook, and TikTok, focusing on visually engaging content (e.g., behind-the-scenes footage, event highlights, historical facts).
- Run targeted ads on social media platforms and Google to reach key demographics, using specific campaigns for different events, programs, and fundraising initiatives.
- Engage with followers by encouraging user-generated content, running photo contests, or using popular hashtags to expand reach.



GOAL 4

4. Brand Awareness and Community Visibility

Fort Adams will be recognized locally, regionally, and nationally as a valued, open, accessible destination that is a pivotal part of its related communities.

2. Expand Media Coverage and Partnerships

- Develop a media outreach strategy, creating press kits and building relationships with journalists, bloggers, and media outlets that align with Fort Adams' mission.
- Pitch stories to regional and national outlets about restoration projects, unique events, or community impact, ensuring Fort Adams is regularly featured in the media.
- Host press events or media days where journalists and influencers are invited to experience Fort Adams firsthand, giving them exclusive access to stories and behind-the-scenes content.
- Partner with travel agencies, tourism boards, and cultural institutions for cross-promotional opportunities.

3. Improve visitor conversion from marketing efforts

- Optimize the Fort Adams website with clear calls-to-action (CTAs) for purchasing tickets, signing up for programs, or donating, ensuring the user journey is simple and efficient.
- Implement retargeting campaigns that follow up with visitors who engage with the website but don't immediately convert, offering incentives such as discounts or event reminders.
- Analyze visitor data using tools like Google Analytics to track conversion rates and adjust marketing strategies to better align with user behavior and preferences.

4. Enhance brand recognition locally

- Participate in community events, fairs, and festivals, setting up booths or interactive exhibits that promote Fort Adams and distribute branded materials (e.g., brochures, merch).
- Partner with local businesses for cross-promotions (e.g., offering discounts to Fort Ad-



GOAL 4

4. Brand Awareness and Community Visibility

Fort Adams will be recognized locally, regionally, and nationally as a valued, open, accessible destination that is a pivotal part of its related communities.

- ams visitors at local shops/restaurants or collaborating on co-branded events).
- Make Fort Adams an essential part of the Newport experience
 - Be highlighted on the tour and public bus route
 - Fix confusion between the fort and the park
 - Partner with local hotels, restaurants, and tour operators for joint promotions.

5. Develop a content strategy

- Launch a blog that highlights the fort's history, restoration efforts, upcoming events, and behind-the-scenes insights, sharing new posts at least bi-weekly.
- Develop an email marketing campaign with monthly newsletters, event announcements, and exclusive content for subscribers, tracking open and click-through rates to improve content engagement.
- Create video content, including virtual tours, interviews with restoration experts, and historical re-enactments, and post across YouTube and social media channels to enhance storytelling.



GOAL 5

5. Sustainable Funding and Resource Development

We will be a sustainable and thriving organization with ample funds for capital improvements.

OBJECTIVES

MEASURE (yardstick)	1 YEAR	2 YEAR	3-5 YEAR
Identify, diversify, and increase annual donor contributions and revenue streams - State/federal funding (30%) - Large philanthropic giving (20%) - Small donations (25%)	State: \$300K Foundations: \$50K Small: \$50K	Increase: State: \$500K Foundations: \$200K Small: 20% increase	Increase an additional: Social: 50%; web traffic by 30%; email subscribers by 25%
Expand grant funding (25%)	2 grants	Secure additional 2 grants	Secure additional 5 grants annually
Develop corporate partnerships	7	Additional 5	Additional 10
Grow endowment	Reorganize endowment fund	Increase 10%	Increase by 10% annually



GOAL 5

5. Sustainable Funding and Resource Development

We will be a sustainable and thriving organization with ample funds for capital improvements.

Strategies

1. Identify, diversify, and increase annual donor contributions and revenue streams

- Create segmented donor campaigns tailored to different donor levels (e.g., small donors, major donors, corporate donors), with specific outreach materials that speak to their interests and contributions.
- Develop an annual giving campaign, leveraging email, direct mail, and social media to highlight Fort Adams' impact and needs, including matching gift opportunities and donor recognition events.
- Host exclusive events for current and prospective donors, offering behind-the-scenes tours, previews of upcoming projects, or VIP access to special Fort Adams events to encourage larger contributions.
- Launch a "Friends of the Fort" membership program and develop premium visitor experiences such as exclusive, guided tours, after-hours access, or special seasonal events with ticketed entry.



2. Expand grant funding

- Identify and apply for grants that align with Fort Adams' mission, including those focused on historical preservation, community engagement, or environmental sustain-



GOAL 5

5. Sustainable Funding and Resource Development

We will be a sustainable and thriving organization with ample funds for capital improvements.

- ability.
- Build relationships with local, state, and national foundations, inviting them for site visits and presentations on Fort Adams' impact and funding needs.
- Hire or designate a grant writer to research, apply for, and track progress on multiple grant applications throughout the year to increase the success rate.
- Develop strategy for each potential financial source (local, state, federal) and work to have a presence in each financial decision-making opportunity.

3. Develop corporate partnerships

- Approach local and regional businesses with tailored partnership proposals, offering them sponsorship opportunities for events, programs, or restoration efforts in exchange for brand exposure.
- Create corporate giving packages that highlight the benefits of supporting Fort Adams, such as employee engagement opportunities, VIP access, or co-branded events, employee volunteer days, event sponsorships, or restoration project sponsorships.

4. Grow endowment

- Launch a campaign specifically aimed at long-term supporters and major donors, encouraging planned giving, bequests, and endowment contributions.
- Highlight the importance of the endowment in ensuring Fort Adams' long-term sustainability, including stories of legacy donors in marketing materials and events.
- Use donor recognition tactics to incentivize contributions to the endowment.



GOAL 6

6. Operational Excellence and Team Empowerment

We will have the organizational culture, staff, structure, governance, technology, operations, and practices that ensure we reach our goals and financial stability.

OBJECTIVES

MEASURE (yardstick)	1 YEAR	2 YEAR	3-5 YEAR
Develop a long-term staffing plan	<i>Set KPIs</i>	<i>Plan: hit 50% of targeted goals</i>	<i>Enhance: sustains 100% of targeted goals</i>
Enhance staff training and development opportunities	<i>Everybody attends 1 and reports back</i>	<i>Everybody attends 1 and reports back</i>	<i>Attend and speak/participate in professional organizations</i>
Increase operational efficiency (data management and reporting)	<i>Identify metrics to be reported</i>	<i>Improve accuracy to 90%</i>	<i>Maintain 100% accuracy</i>
Strengthen board governance and engagement	<i>Approve new board job description and evaluate board alignment</i>	<i>Increase engagement and alignment to 75%</i>	<i>Increase engagement and alignment to 100%</i>
Enhance financial management and reporting	<i>Conduct quarterly financial reviews</i>	<i>Reduce 10% reduction in operating costs</i>	<i>Reduce operating costs by 20%</i>



GOAL 6

6. Operational Excellence and Team Empowerment

We will have the organizational culture, staff, structure, governance, technology, operations, and practices that ensure we reach our goals and financial stability.

Strategies

1. Develop a long-term staffing plan

- Conduct a staffing needs assessment, considering future program expansions and restoration projects, to determine current and future staffing requirements.
- Create formal job descriptions and processes/controls policy documents for key leadership and management roles, identifying and preparing internal candidates for future promotions through leadership development programs.



2. Enhance staff training and development opportunities

- Empower staff by providing them with the necessary tools, resources, and opportunities to excel in their roles.
- Create an annual training calendar that includes workshops, seminars, and courses aligned with both organizational needs (e.g., historical preservation, event management) and individual staff growth.
- Partner with local educational institutions, nonprofits, or professional organizations to provide free or discounted training opportunities.

3. Increase operational efficiency



GOAL 6

6. Operational Excellence and Team Empowerment

We will have the organizational culture, staff, structure, governance, technology, operations, and practices that ensure we reach our goals and financial stability.

- Audit current processes to identify bottlenecks and inefficiencies, then introduce project management tools to track progress, streamline workflows, and increase accountability.
- b. Digitize and centralize key documents and data in cloud-based systems (e.g., Google Workspace, Microsoft 365) to ensure easy access and reduce time spent on administrative tasks.
- Automate routine tasks (e.g., donor acknowledgments, event registration) using CRM software, allowing staff to focus on higher-impact work.
- Create a central information hub (e.g., intranet or shared drive) where all staff can access important documents, updates, and project plans to ensure consistency and clarity in communication.
- Hold monthly cross-departmental meetings to ensure alignment on ongoing projects, events, and initiatives, and to address any challenges early on.
- Recognize and celebrate team achievements to foster a positive work environment and enhance employee engagement.

4. Strengthen board governance and engagement

- Develop and approve board job description to establish clear roles and responsibilities for board members, with measurable performance goals and regular reviews to increase accountability and participation.
- Conduct a board assessment to identify skill gaps and areas for improvement, then recruit new board members who can provide expertise in areas like fundraising, marketing, or nonprofit governance.
- Schedule annual board retreats or strategy sessions to enhance board engagement in long-term planning and to foster stronger relationships between board members and staff.



GOAL 6

6. Operational Excellence and Team Empowerment

We will have the organizational culture, staff, structure, governance, technology, operations, and practices that ensure we reach our goals and financial stability.

- 100% participation in annual giving.

5. Enhance financial management and reporting

- Upgrade and enhance our comprehensive accounting software that can generate detailed financial reports, track expenses, and forecast budgets more effectively.
- Transition ownership of financials and monthly reporting to individual staff service areas: Events, Gift Shop, Tours, Development.
- Conduct quarterly financial reviews with the board finance committee and key staff to monitor budget adherence, identify cost-saving opportunities, and ensure financial sustainability.
- Implement cost-saving initiatives (e.g., reducing energy usage, renegotiating vendor contracts) to lower operational costs, while reallocating saved funds to critical programs or capital improvements.

