

Oak Hill Cemetery Historic Preservation Foundation

Strategic Plan

2018 - 2022



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Executive Summary

This is Oak Hill Cemetery Historic Preservation Foundation's (OHCHPF) inaugural strategic plan. A strategic planning retreat was conducted on February 10, 2018 that included members of the OHCHPF Board of Directors and the Oak Hill Cemetery (OHC) Board of Managers (Appendix A). The work from the retreat, together with long-standing conversations among the board members, created this plan. This plan codifies the ongoing work of the Foundation while additionally providing a path forward to achieve long-term goals.

Currently, Oak Hill Cemetery is an operating cemetery so OHCHPF's role is focused on planning, securing funding, and conducting preservation and restoration work. Over time, as interment space at Oak Hill Cemetery is no longer available, we anticipate that some of the cemetery's responsibilities will become part of Oak Hill Cemetery Historic Preservation Foundation's purview. When Oak Hill Cemetery is a museum (and not an active cemetery), OHCHPF's role will be to maintain and preserve the historic cemetery for both relatives and the public.

The Oak Hill Cemetery Historic Preservation Foundation has four significant focus areas: preservation and restoration, future grounds beautification, community outreach and financial stewardship.

The current members of the Oak Hill Cemetery Historic Preservation Foundation Board are: George Hill - President, Judi Cochran, Rick Fischer, Darla Jackson, and Andy Seferlis. Oak Hill Cemetery Board of Managers members are George Hill – President, Patricia Berl, Loretta Castaldi, and David C. deVicq. Dave Jackson serves as Executive Director of OHCHPF and Superintendent of Oak Hill Cemetery. Both Boards believe it is to their advantage to share a limited number of Board members.

Background

Oak Hill Cemetery Historic Preservation Foundation is a 501(c)3 organization founded in 2003. It operates in support of Oak Hill Cemetery, which in turn is operated by Oak Hill Cemetery Company, a 501(c)13 non profit cemetery. Both organizations have very distinct missions.

Oak Hill Cemetery Historic Preservation Foundation Focus and Purview

- Preservation and restoration of the cemetery with a focus on projects that allow the cemetery to operate long-term
- Preventive maintenance of the grounds (tree work and drainage)
- Repair and restoration of public structures and public areas (entire Chapel, roof/windows/ exterior of the Gate House)
- Future grounds beautification

Oak Hill Cemetery Company Focus and Purview

- Ongoing operations, the events of the day
- Maintenance of the grounds (tree work for accessibility or safety)
- Maintenance of non-public structures (the Grounds Building)

- Maintenance of non-public areas of public structures (interior of the Gate House)

The two organizations work well together and are supportive of each other. In fact, they currently share a board president, George Hill. Both organizations must continue to more clearly define where the responsibility falls – or is shared – for issues of cemetery maintenance, including drainage, roads, pathways, social media, digitized records, beautification, and tree work.

Mission

Oak Hill Cemetery Historic Preservation Foundation’s mission is to:

Preserve the publicly accessible Oak Hill Cemetery, a nineteenth century romantic garden park cemetery, its historic interment sites, structures, and records, and to support its functions and activities.

Vision

Oak Hill Cemetery Historic Preservation Foundation’s vision, as an aspiration and inspiration, is:

Preserving Oak Hill Cemetery as an enduring place of sanctuary, beauty and history.

Core Values

As guiding principles, Oak Hill Cemetery Historic Preservation Foundation honors these core values:

- Respect
- Community
- Sustainability
- Excellence
- Historic Preservation

2018 – 2022 Goals and Objectives

Oak Hill Cemetery Historic Preservation Foundation adopted four goals to guide its direction and work for the calendar years of 2018 – 2022:

1. Advance historic preservation and restoration of Oak Hill Cemetery
2. Advance Oak Hill Cemetery grounds beautification
3. Increase outreach to and engagement with the community to raise general awareness of Oak Hill Cemetery
4. Maintain strong financial stewardship to provide support for Oak Hill Cemetery now and in the future

Strategic Goal #1: Advance historic preservation and restoration of Oak Hill Cemetery

2018 Objectives

1. Update the inventories of monuments ^{1,2}
 - Action Steps: Outline scope of project and budget; Complete first phase
 - Timeline: December 31, 2018
 - Responsible Party: Dave Jackson and Grounds Manager
2. Update the *1998 Bartlett Tree Inventory*
 - Action Steps: Outline scope of project and budget; Apply for grant and determine contractor
 - Timeline: December 31, 2018
 - Responsible Party: Dave Jackson and Grounds Manager
3. Update the *2002 A. Morton Thomas Drainage Study*
 - Action Steps: Outline scope of project and budget; Apply for grant and determine contractor
 - Timeline: December 31, 2018
 - Responsible Party: Dave Jackson and Grounds Manager
4. Complete Phase 1 of Historic Bigelow Iron Fence restoration
 - Action Steps: Phase 1 details per plan
 - Timeline: December 31, 2018
 - Responsible Party: Dave Jackson

Note: Caution – do not wait for full inventories. Review information in-hand on a regular basis and make decisions.

2019 – 2022 Objectives

- Complete inventories and studies (monuments, trees, drainage)
- Complete restoration of Historic Bigelow Iron Fence
- Update cemetery map
- Create plan for restoration of monuments, based on inventory
- Create an inventory of significant plant material and condition (other than trees)
- Restore the Gate House exterior
- Digitize historic records – burial, plot and mausoleum
- Update historical records
- Create additional office space for OHCHPF staff

¹ Wesley Pippinger's two-volume Oak Hill, available upon request

² Christian Hill's summer 2016 "Leaners, Wobblers and Fall Downs Survey", available upon request

Strategic Goal #2: Advance Oak Hill Cemetery grounds beautification

2018 Objectives

1. Determine ways to improve and begin to fix accessibility
 - Action Steps: Inventory steps and pathways needing remediation
 - Timeline: December 31, 2018
 - Responsible Party: Dave Jackson and Grounds Manager
2. Prioritize and continue work on pathway restoration and drainage
 - Action Steps: Work on high priority pathways
 - Timeline: December 31, 2018
 - Responsible Party: Captain David deVicq and Grounds Manager
3. Create master plan for grounds improvement
 - Action Steps: Dave Jackson and George Hill provide framework /essay on master plan
 - Timeline: December 31, 2018
 - Responsible Party: Dave Jackson and Grounds Manager

2019 – 2022 Objectives

- Evaluate historic markers and interpretative signs, add new markers and signs as necessary
- Increase the amount of sculpture and identify areas for additional sculpture
- Increase serenity spaces, incorporating naming and/or dedication options, including benches, pathways, etc.

Strategic Goal #3: Increase outreach to and engagement with the community to raise general awareness of Oak Hill Cemetery

2018 Objectives

1. Redo website
 - Action Steps: Launch new website
 - Timeline: May 31, 2018
 - Responsible Party: Liz Mizell, George Hill, The Two Penguins
2. Increase social media outreach
 - Action Steps: Hire social media firm
 - Timeline: June 30, 2018
 - Responsible Party: Liz Mizell, Addison Clark

2019-2022 Objectives

- Plan more lectures, concerts, special events
- Participate in a home/garden tour
- Offer a variety of tours
- Plan community outreach in support of goals #1 and #2 (preservation/restoration and beautification)
- Increase the number of volunteer opportunities
- Strengthen strategic partnerships with DC Preservation League and Georgetown community
- Continue to develop intern program

Strategic Goal #4: Maintain strong financial stewardship to provide support for Oak Hill Cemetery now and in the future

2018 Objectives

1. Implement strong donor data management systems
 - Action Steps: Complete migration to Little Green Light
 - Timeline: June 30, 2018
 - Responsible Party: Liz Mizell, The Sheridan Group, Lois Brown
2. Continue strong fiscal policies, including annual financial review
 - Action Steps: Complete review
 - Timeline: June 30, 2018
 - Responsible Party: George Hill, Dave Jackson, Judy Cochran
3. Develop a funding plan for prioritized capital projects including restoration of the Gatehouse and Historic Bigelow Iron Fence
 - Action Steps: Outline scope of project and budget, strengthen fundraising plan
 - Timeline: December 31, 2018
 - Responsible Party: Dave Jackson, The Sheridan Group

2019-2022 Objectives

- Conduct a OHCHPF financial reserve study for preservation/restoration needs, akin to the OHCC reserve study
- Fund OHCHPF endowment
- Continue dialog with OHCC about long-term planning
- Conduct feasibility study and implement capital campaign

OHCHPF's Stakeholders and Collaborators

During the strategic planning conversation, there was a discussion of OHCHPF's stakeholders, collaborators, and industry associates. This list can be a resource for strategic plan implementation.

Stakeholders

- Oak Hill Cemetery
- Lot holders
- Descendants of lot holders
- Georgetown community members
- History enthusiasts

Collaborators

- Oak Hill Cemetery
- Georgetown House Tour
- Georgetown Garden Club (and Garden Tour)
- DAR/Colonial Dames/etc.
- Mark Ein
- Evermay
- Dumbarton House
- Dumbarton Oaks
- Tudor Place
- Universities – American, George Washington, etc.
- DC Preservation League
- Casey Trees
- Oak Hill Cemetery vendors and contractors
- Citizens Association of Georgetown
- Georgetown Business Improvement District
- Mt. Zion Cemetery
- Churches
- Funeral Homes
- National Trust for Historic Preservation
- National Park Service
- Georgetown Business Association
- Congressional Cemetery
- Georgetown Library
- Historic Society of DC
- Smithsonian

Industry Associates

- Congressional Cemetery
- Arlington National Cemetery
- Mt. Zion Cemetery
- Mt. Auburn Cemetery
- Rock Creek Cemetery
- Other DC Cemeteries
- Other historic cemeteries

Accountability

The strategic plan will be reviewed twice a year by the Oak Hill Cemetery Historic Preservation Foundation board. The Executive Director will complete and distribute the progress reports. The strategic objectives are based on the calendar year. The review conducted at the Annual Meeting (June) will be a status update and the review conducted at the end of the calendar year (December) will be to evaluate, amend and create objectives for the following year.

This inaugural strategic plan has an aggressive scope so the board will need to carefully monitor real time progress. It is anticipated that during the plan's first year that there may be a standing board meeting agenda item to add additional detail to the plan. During the biannual reviews, the board may adjust timelines and deliverables as necessary to focus on the most important pieces of the work and to reflect unforeseen circumstances. To support implementation and monitor progress, sample report cards are in Appendix E.

Objectives outlined for 2019 - 2022 will need to be evaluated and detailed by the board on an annual basis. Staff is responsible for review and progress evaluation of the objectives as well as for recommendations for future adjustments and action plans. The Board recommends a formal review of the strategic plan by an outside facilitator be conducted in January 2021 or sooner if necessary.

It is the consensus of both staff and board members that the staff will be the main implementers of the strategic plan and that the board will provide guidance. That said, the staff is small so the board is ready to participate in appropriate ways to ensure forward movement.

Note: OHCHPF's fiscal year runs May 1st through April 30th.

APPENDIX A – Retreat Participants

The Oak Hill Cemetery Historic Preservation Foundation’s strategic planning retreat was held on February 10, 2018. As this is OHCHPF’s inaugural strategic plan, member of both the OHCHPF Board of Directors and the Oak Hill Cemetery (OHC) Board of Managers were invited to attend.

Retreat Attendees

- George Hill, President, OHCC and OHCHPF
- Judi Cochran, OHCHPF
- Rick Fischer, OHCHPF
- Darla Jackson, OHCHPF
- Patricia Berl, OHCC
- Loretta Castaldi, OHCC
- David C. deVicq, OHCC
- Dave Jackson, Executive Director of OHCHPF and Superintendent of OHCC
- Jeff Hale, The Sheridan Group
- Liz Mizell, Director of Development Communications and Individual Giving, OHCHPF

APPENDIX B – Envisioning the Future

As part of the creation of OHCHPF's first strategic plan, Board members envisioned the impact their work will have in the near term (10 years from now) and the long-term (100 years from now).

Ten years from now, while Oak Hill Cemetery is still an operating cemetery, the board envisions that the work of OHCHPF will have impacted the cemetery in a variety of ways:

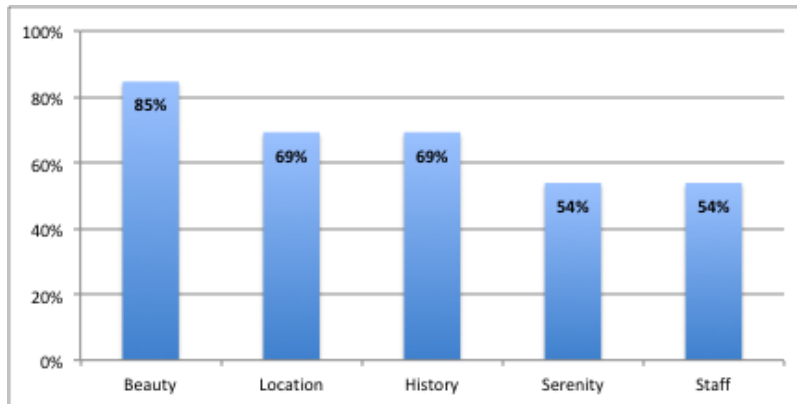
- Amplified philanthropy through annual giving, planned giving, grants, sponsorships, and a capital campaign
- Completed preservation and restoration projects, including the restoration of the Historic Bigelow Iron Fence and the exterior of the Gate House
- Supported ongoing preservation and restoration projects including monument restoration
- Increased/improved access within cemetery
- Strengthened community relationships and partnerships
- Increased public attendance for concerts, lectures, special events, and tours
- Established educational partnerships, including genealogy
- Digitized records
- Reduced backlog of deferred restoration projects
- Nurtured dedicated, long-serving leadership
- Created a robust volunteer program to assist with outreach and programs

One hundred years from now, when Oak Hill is no longer an operating cemetery but has become a museum, the OHCHPF envisions their impact will be seen in the following ways:

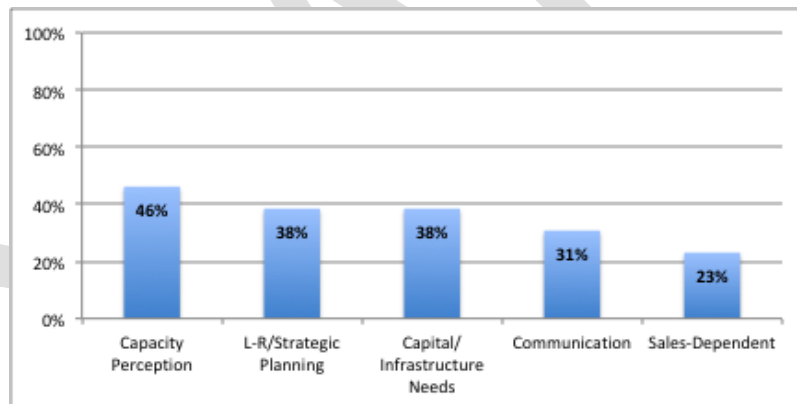
- Establishment of a significant endowment for ongoing restoration and preservation activities to strengthen Oak Hill through the generations
- Dedication to education and historical research
- Creation of new gardens and sculpture areas, perhaps including a greenhouse
- Dedication to community-building through concerts, lectures, and access to arts and culture
- Commitment to tranquility and beauty
- Enduring connections with neighboring Georgetown historic sites

APPENDIX C - Relevant Highlights: Board and Donor Feedback from The Sheridan Group's Oak Hill Assessment, Fall 2017 (OHCC and OHCHPF)

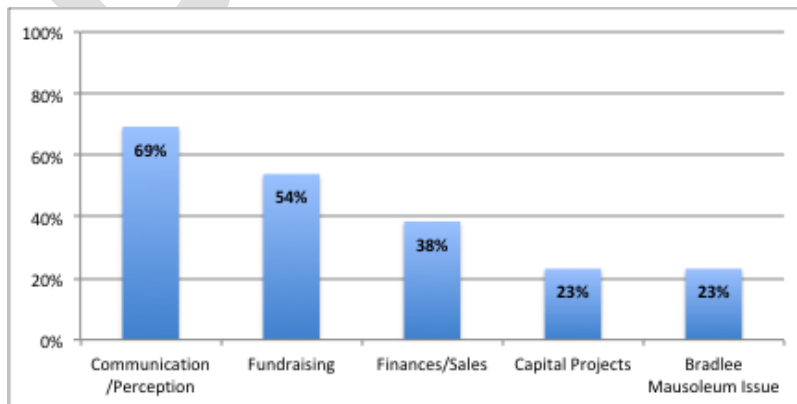
Internal Stregths



Internal Weaknesses



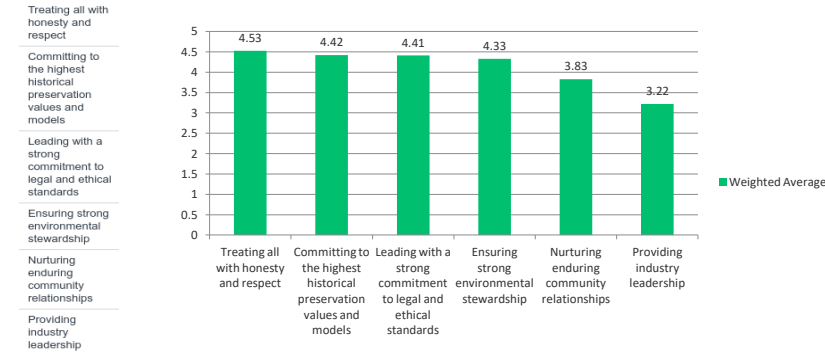
Challenges



APPENDIX D - Constituent Survey Highlights from The Sheridan Group (February 2018)

Q3: Recognizing that each is important, which core values should Oak Hill prioritize? (Scale of 1-5 with 5 being the highest)

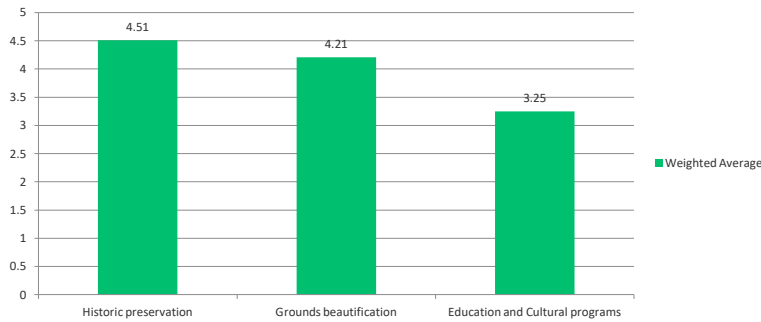
Answered: 60 Skipped: 3



Powered by SurveyMonkey

Q4: Recognizing that each is relevant, how would you prioritize the following investment areas for Oak Hill during the next 3-5 years? (Scale of 1-5 with 5 being the highest)

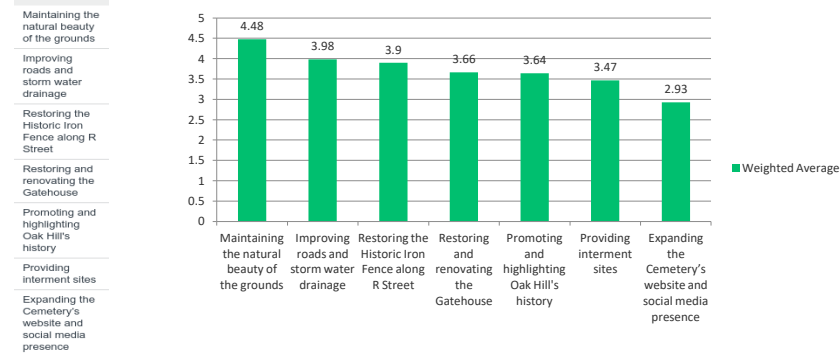
Answered: 62 Skipped: 1



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Q5: Please prioritize the following initiatives to maintaining Oak Hill as a resource for the larger community. (Scale of 1-5 with 5 being the highest)

Answered: 62 Skipped: 1



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APPENDIX E – Samples of Annual/Biannual Report Card

Sample #1: Oak Hill Cemetery Historic Preservation Foundation Strategic Plan Progress

Goals and 2018 Objectives

What is the current progress achieved? If there is less progress than anticipated, why is that? Does anything need to be adjusted?

1. Advance historic preservation and restoration of Oak Hill Cemetery.

- | | |
|---|-----------------------------------|
| • Update the inventories of monuments | Not Started/In Progress/Completed |
| • Update the 1998 Bartlett Tree Inventory | Not Started/In Progress/Completed |
| • Update the 2002 A. Morton Thomas Drainage Study | Not Started/In Progress/Completed |
| • Complete Phase 1 of Iron Fence restoration | Not Started/In Progress/Completed |

2. Advance Oak Hill Cemetery grounds beautification.

- | | |
|--|-----------------------------------|
| • Determine ways to improve and begin to fix accessibility | Not Started/In Progress/Completed |
| • Prioritize and continue work on pathway restoration and drainage | Not Started/In Progress/Completed |
| • Create master plan for grounds improvement | Not Started/In Progress/Completed |

3. Increase outreach to and engagement with the community to raise general awareness of Oak Hill Cemetery.

- | | |
|----------------------------------|-----------------------------------|
| • Redo website | Not Started/In Progress/Completed |
| • Increase social media outreach | Not Started/In Progress/Completed |

4. Maintain strong financial stewardship to provide support for Oak Hill Cemetery now and in the future

- | | |
|---|-----------------------------------|
| • Implement strong donor data management systems | Not Started/In Progress/Completed |
| • Continue strong fiscal policies, including annual financial review | Not Started/In Progress/Completed |
| • Develop a funding plan for prioritized capital projects including restoration of the Gatehouse and Iron Fence | Not Started/In Progress/Completed |

Additional Evaluation Questions

1. Are our goals and fundraising priorities well aligned?
2. Are a variety of people involved with implementing the strategic plan? Staff? Board? Do we need additional implementation support/help?
3. Are there any “issues of the day” (political, economic) that could affect the implementation of the strategic plan?

Sample #2: Oak Hill Cemetery Historic Preservation Foundation Strategic Plan Progress

Oak Hill Cemetery Historic Preservation Foundation 2018-2022 Strategic Plan -- June, 2018 Report Card												
2018-2022 Goals / 2018 Objectives	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
I. Advance historic preservation and restoration of Oak Hill Cemetery.												
<i>Update the inventory of monuments</i>												
<i>Update the 1998 Bartlett Tree Inventory</i>												
<i>Update the 2002 A.Morton Thomas Drainage Study</i>												
<i>Complete Phase I of the Iron Fence Restoration</i>												
II. Advance Oak Hill Cemetery grounds beautification.												
<i>Determine ways to improve and begin to fix accessibility</i>												
<i>Prioritize and continue work on pathway restoration and drainage</i>												
<i>Create master plan for grounds improvement</i>												
III. Increase outreach to and engagement with the community to raise general awareness of Oak Hill Cemetery.												
<i>Redo website</i>												
<i>Increase social media outreach</i>												
IV. Maintain strong financial stewardship to provide support for Oak Hill Cemetery now and in the future												
<i>Implement strong donor data management systems</i>												
<i>Continue strong fiscal policies, including annual financial review</i>												
<i>Develop a funding plan for prioritized capital projects including restoration of the Gatehouse and Historic Bigelow Iron Fence</i>												
<i>N = Not Yet Started I = In Progress C = Completed</i>												
Key Semi-Annual Progress Evaluation Questions: <i>What is the current progress achieved? If there is less progress than anticipated, why is that? Does anything need to be adjusted?</i>												
Additional Evaluation Questions: <i>1. Are our goals and fundraising priorities well aligned? 2. Are a variety of people involved with implementing the strategic plan? Staff? Board? Do we need additional implementation support/help? 3. Are there any "issues of the day" (political, economic) that could affect the implementation of the strategic plan?</i>												