



COASTAL GEORGIA
**HISTORICAL
SOCIETY**

STRATEGIC PLAN

2025-2030

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The mission of the Society is to connect people to Coastal Georgia’s dynamic history through the stories we share and the collections we preserve.

The values of the Coastal Georgia Historical Society are trust, stewardship, education, community, and innovation. This strategic plan reflects these pillars of our organization’s commitment to our mission.

[Use of brackets/italics throughout represents guidance for the final print layout.]

EXECUTIVE SUMMARY

Over the past decade, the Coastal Georgia Historical Society has seen incredible growth in its facilities, educational programs, engagement from the community and members, financial well-being, and its reputation as an institution committed to excellence. This foundation gives the Society the opportunity to focus its next five years outwardly, growing collaborations and partnerships, enhancing educational opportunities, exhibits, and collections, and connecting more of Coastal Georgia's people with their shared stories.

To take on the ambitious scope of this vision, the Board of Directors launched its strategic planning process in May 2024. The process engaged stakeholders internally and from the broader community in surveys, focus groups, and visitor questionnaires, providing a robust amount of data and feedback on strengths, weaknesses, opportunities, and threats. Peer institution research informed understanding on new and best practices. The Board convened in September 2024 to crystallize these findings into a strategy to guide the next five years.

The Society has set forth five strategic priorities, with goals and objectives clearly outlined to reach targeted outcomes. Over the next five years, the Society will focus on

- Partnerships and community collaborations,
- Maximizing utilization and preservation of facilities,
- Deepening educational programming and research,
- Expanding and enhancing collections, and
- Innovating for a sustainable and scalable future.

The following document outlines the process and product of the months of strategic planning work done by the Board and staff, with the help and input of many stakeholders. It chronicles the process, provides an overview of the key findings, and shares the goals, objectives, and outcomes determined by the Board and leadership as propelling the Society to its most impactful future.

BOARD MEMBERS & EXECUTIVE LEADERSHIP

Mary Schellhorn, President

Duane Harris, Immediate Past President

Keith Calhoun, Vice President

Jeffrey Molitor, Treasurer

Cheryl Hargrove, Secretary

Sherri Jones, Executive Director

Mimi Rogers, Curator

Jack Crews

Brad Danowski

Johnny Evans

Shannon Gilreath

Lucy Glasebrook

John Hunter

Steven Kerr

Susan Lawhorne

Susan Myers

Brenda Nease

Janis Rehlaender

Honorary Trustees:

Mary Burdell

Albert Fendig

BACKGROUND OF THE SOCIETY

In 1965, a small group of local residents formed the Society with an ambitious vision: to lead in the preservation of the artifacts and buildings that are the treasures of our coastal heritage. Their shared commitment to excellence, stewardship, education, and the stories of our community and region are still at the core of the cherished institution the Society has become.

Today, the Society is proud to serve the community as the owner of the St. Simons Lighthouse and the A.W. Jones Heritage Center and custodian of the Lighthouse Keeper's Dwelling and Historic Coast Guard Station at East Beach. Beyond the significance of these sites in the coastal story, they are also alive with engaging and immersive exhibits, educational programs, treasured lecture series, an archaeology lab, and opportunities for residents and visitors to celebrate the multifaceted history of our region. As a driver for heritage tourism in the Coastal region, the Society's role in preservation, stewardship, collection, and education has long held the public's trust.

Honoring its long history of upholding the highest standards of excellence for its sites, museums, and programming, the Society is accredited by the American Alliance of Museums. This prestigious recognition assures that all aspects of the Society's work meet rigorous standards for museum operations, governance, collections stewardship, education, public programming, financial stability, and ethics. The Society was reaccredited in 2012 for fifteen years and will complete the next reaccreditation during this Strategic Plan.

The 2020-2025 Strategic Plan fostered a period of expanded programming, enriched community engagement, and robust foundations to take on the next five years' strategic priorities. Some of the key outcomes from the 2020-2025 Strategic Plan include

- Digitization of the collection, with expanded online resources for educators, researchers, and the public;
- Collaborations with local schools and educators to connect more residents with our shared history;
- Partnerships with local organizations and scholars to launch the Brunswick Lecture Series;
- Completion of the Preservation Campaign to ensure funding for the ongoing maintenance and preservation of our historic sites;
- Growth in collections and artifacts that help tell the multifaceted story of our region from generous donors and the work of the Archaeology Lab.

In addition to tackling these strategic priorities, the Society has continued to be a valuable community partner in Coastal Georgia, supporting historical celebrations like the FJ Torras Causeway Centennial Celebration and the Harrington School Centennial, and hosting lectures by renowned scholars and authors that enrich our historical understanding of the region.

[quote for this section: "Seeing how much everyone cares about not only the museum space, but about sharing and preserving the history for everyone who will follow us is inspiring." -Staff Member, Focus Group]

[quote for this section: "The Society has a true dedication and commitment to preserving, advocating, and sharing the Golden Isles history and heritage." -Member, Survey Response]

INTRODUCTION & OVERVIEW OF THE PROCESS

With almost five years of tremendous achievement and community-facing growth creating momentum for the next strategic plan, the Board President and Executive Director retained a strategic planning consultant in January 2024 and charted the roadmap for a 6-month process of data collection, stakeholder engagement, and industry research.

Board President Mary Schellhorn convened a Strategic Planning Committee, including Executive Director Sherri Jones, Curator Mimi Rogers, Vice President Keith Calhoun, Treasurer Jeff Molitor, Secretary Cheryl Hargrove, Jack Crews, Steve Kerr, Susan Lawhorne, Susan Myers, and consultant Ande Noktes.

After approval of the roadmap by the board at the May 2024 Board Meeting, data collection began with surveys, focus groups, and peer institution research. Surveys were sent to board members, staff, volunteers, Keepers of the Light, and General Members in June 2024 to uncover strengths, opportunities, weaknesses, and challenges facing the Society from these diverse stakeholder perspectives. 73% of board members, 10 staff members, 19 volunteers, 88 members completed the anonymous electronic survey. In addition, staff conducted 107 visitor surveys in person at the two campus locations in July 2024.

In June and July 2024, focus groups were conducted with full time staff, museum staff, volunteers, Keepers of the Light, and a large group of community leaders representing organizations across the region. Focus groups ranged from 8-18 participants and each lasted an average of 75 minutes. Focus groups were transcribed but not recorded to protect anonymity. The data from the transcribed group sessions was coded and categorized for the board's use at the strategic planning retreat.

Online reviews of the Society's sites and programs were also aggregated, coded, and categorized during the data collection process.

The Strategic Planning Committee researched peer institutions from across the country in July and August 2024. The institutions were selected for their potential to share innovative practices, as comparative institutions, and as aspirational peers. The institutions selected for analysis were

- Historic Annapolis
- Atlanta History Center
- Newport Historical Society
- Greenwich Historical Society
- Tampa Bay History Center
- St. Augustine Lighthouse
- Telfair Museum
- Historic New Orleans Collection
- Charleston Museum
- Augusta History Museum
- Nantucket Historical Society

With rich and substantive qualitative and quantitative data to inform its next five-year strategy, the Society's board met over two half-days in September 2024 for a Strategic Planning Retreat. Leveraging the vast amount of data collected over the summer months and the findings from the peer institution research, the Board of Directors distilled five strategic priorities and outlined the goals and objectives to guide the implementation of those priorities through 2030.

The executive leadership, consultant, Board President, and Strategic Planning Committee collaborated to finalize the 2025-2030 Strategic Plan for approval at the December 2024 Board Meeting.

[quote for this section: "The Society has a collection of highly visible local buildings and artifacts which are beloved by the local community and worthy of preservation. They have a committed community of people ready to join in this task." - Member, Survey Response]

[quote for this section: "Thank you for acknowledging that we have some contributions and input to share. It shows that you are really serious about genuinely improving conversations about our history." -Community Leader, Focus Group]

SUMMARY OF FINDINGS

After aggregating all of the data from surveys, focus groups, and visitor feedback, a SWOT analysis was prepared for the Board of Directors outlining the perceived strengths and weaknesses of the organization and respondents' perspectives on opportunities and threats or challenges. The following table outlines the top responses in each category, in order of the frequency of the responses, across all stakeholder groups.

STRENGTHS

Existing interactive exhibits

Talented and engaged staff and leadership

Well-maintained facilities

Excellent lectures and impactful programs

Strong volunteers

Positive impact of existing children's and school programming

Financial stability

Existing collections

Powerful mission and alignment of programs and activities to it

Strong brand and reputation

WEAKNESSES

Need more exhibit space

More interactive exhibits needed

Lighthouse exhibits

Marketing and public relations to build audience and visitors

Internal processes

Breadth and diversity of collections

Storage and archival space

Accessibility in museums

Embracing the "coastal" in CGHS

Communicating the value of membership

OPPORTUNITIES & IDEAS

More programming or opportunities in Brunswick

Create more connections to the local community

Increase children's programming

Create partnerships and collaborations with other museums and historical organizations

Expand lecture series

Create rotating or traveling exhibits

Promote the use of the digital archives

Grow or improve existing buildings

Increase options for families

Create new partnerships with shared goals in the community

THREATS & CHALLENGES

Urgency to expand collections to preserve and protect artifacts and stories

Diversifying membership

Recruiting volunteers

Challenges with recruiting talented staff with current benefits

Perceived as "elite" or only for the wealthy

Potential for mission creep, overextending to fill community gaps

Financial stress in the case of market downturn

The destruction of historic sites by developers

Stretching staff too thin with new projects

Staff size and expertise

[convert to table SW/OT]

While there was significant consensus on this feedback, it was helpful for the Board to see the frequency of each response by stakeholder group. For example, visitors and volunteers overwhelmingly listed the existing interactives at the Home Front museum as a strength, but the

board, staff, members, and community rarely listed this as a strength. The following table shows the top SWOT results by stakeholder group.

BOARD

Strengths

Staff and leadership

Financial Stability

Community Outreach

Commitment to Excellence

Weaknesses

Need for exhibit space

Breadth and diversity of collections

Need for more interactive exhibits

Storage and archival space

Opportunities & Ideas

Grow or improve existing buildings

Hire more staff

Create a plan for community collaboration

More partnerships and collaborations with museums and historical organizations

Grow collections

Threats & Challenges

Diversify membership

Urgency to expand collections

Challenges with recruiting staff with current benefits

Stretching staff too thin

COMMUNITY

Strengths

Strong emotional connection to local history

Excellent staff and leadership

Impactful programs

Positive impact of existing children's and school programming

Weaknesses

Need for exhibit space

Breadth and diversity of collections

Storage and archival space

Opportunities & Ideas

More connection to local community

Create a plan for community collaboration

More partnerships and collaborations with museums and historical organizations

Create more opportunities for academic scholarship

Go into schools for more hands-on learning of history

Create opportunities for more community conversations about history

Teacher training

Oral histories and storytelling

Threats & Challenges

Urgency to expand collections

Inaccurate historical markers

MEMBERS

Strengths

Talented and engaged staff and leadership

Well-maintained facilities

Excellent lectures and impactful programs

Strong volunteers

Weaknesses

Need more exhibit space

More interactive exhibits needed

Lighthouse exhibits

Marketing and public relations to build audience and visitors

Opportunities & Ideas

More programming or opportunities in Brunswick

Create more connections to the local community

Increase children's programming

Create partnerships and collaborations with other museums and historical organizations

Expand lecture series

Create rotating or traveling exhibits

Threats & Challenges

Urgency to expand collections to preserve and protect artifacts and stories

Diversifying membership

Recruiting volunteers

STAFF

Strengths

Talented and engaged staff and leadership

Well-maintained facilities

Excellent lectures and impactful programs

Strong emotional connection to local history

Gift shop and museum store

Children's programming

Weaknesses

Need more exhibit space

Internal processes

More interactive exhibits needed

Lighthouse exhibits

Marketing and public relations to build audience and visitors

Opportunities & Ideas

More connection to the local community

Increase children's programs

Create rotating or traveling exhibits

Become the authoritative source for coastal history

Prioritize existing facility and tech upkeep

Hire more staff

Threats & Challenges

Urgency to expand collections

Need to diversify membership

Perceived as "elite" or only for the wealthy

Prevent destruction of historic sites by developers

Staff size and expertise

VOLUNTEERS

Strengths

Existing interactive exhibits

Talented and engaged staff and leadership

Well-maintained facilities

Excellent lectures and impactful programs

Positive impact of existing children's and school programming

Weaknesses

Need more exhibit space

More interactive exhibits needed

Lighthouse exhibits

Accessibility in museums

Embracing the “coastal” in CGHS

Opportunities & Ideas

Use more technology in exhibits

Grow collections

Promote the use of digital archives

More connections to the local community

Prioritize existing facility and tech upkeep

Threats & Challenges

Urgency to expand collections

Recruiting volunteers

Potential for mission creep, overextending to fill community gaps

[convert to table with one box per stakeholder group]

VISITOR FEEDBACK

Of the 107 visitor surveys, 56 were conducted at the Lighthouse Campus and 51 at the Home Front Campus. The Net Promoter Score (NPS), a measurement that reflects, on a scale of 1-10, how likely a respondent is to recommend the experience to a friend or family member is often used as proxy to measure visitor engagement, retention, organizational reputation, and growth potential. For the Lighthouse Campus, the NPS was a 9.5 and for the Home Front Campus, a 9.7.

The top strengths included climbing the lighthouse, the period rooms at the Lighthouse Campus, and the interactives and videos at the Home Front Museum. The top wishlist item from visitors was a desire to see more interactive exhibits at the lighthouse and more kids activities overall.

At the Lighthouse Campus, 61% of the respondents were from out-of-state, 35% were nonlocal Georgia visitors, and 4% were local. At the Home Front Campus, 58% of those surveyed were from out-of-state, 40% were nonlocal from Georgia, and 2% were local visitors.

This, along with the overwhelmingly positive online reviews, reflect the value of the Society’s museum experiences to heritage tourism in our region.

[quote for this section: “The Historical Society should build partnerships to reach more of the community and new audiences. As I’m listening, I just keep hearing collaboration, collaboration, collaboration.” – Keeper of the Light, Focus Group]

[quote for this section: “The lighthouse just needs to be more interactive. Some people come and just want to climb to the top, but there is so much more to it than that that we could show with living history or interactive

exhibits or even some experiences of what it would have been like as the lighthouse keeper.”–Volunteer, Focus Group]

STRATEGIC PRIORITIES & GOALS

As a result of the feedback and data collected during the strategic planning process, the Society has committed to five strategic priorities: partnerships and community collaborations, maximizing utilization and preservation of facilities, deepening educational programming and research, expanding and enhancing collections, and innovating for a sustainable and scalable future.

PARTNERSHIPS AND COMMUNITY COLLABORATIONS

Our goal in this strategic priority is to grow our network of formal partnerships and informal collaborations to raise awareness and deepen understanding of Coastal Georgia's unique and diverse history and those organizations and sites that together tell its stories.

Outcomes we will see as a result:

- As community leader and convener, greater awareness and dialogue across the region about history, archaeology, preservation, and the stories we share.
- Build capacity for the Coastal Georgia Historical Society through formal and informal partnerships.
- The Coastal Georgia Historical Society is a statewide resource for coastal Georgia history.

Objectives:

1. Establish a standard for effective formal partnerships that include mutual goals, shared accountability, and transparency.
2. Formalize existing partnerships to serve more of the community, build capacity, and reach shared goals.
3. Host regular community meetings or forums to encourage knowledge sharing, collaboration, and capacity building for history-related initiatives.
4. Form informal collaborations with regional museums, historical societies, colleges and universities, and cultural organizations to enhance the network dedicated to promoting and preserving regional history.
5. Create a council of ambassadors to help communicate the organization's message to broader audiences and reach new potential partners.
6. Craft a communications plan to maintain relationships and grow partnership opportunities.
7. Evaluate board committee and staff roles to ensure the prioritization of partnerships and collaborations.

MAXIMIZING UTILIZATION AND PRESERVATION OF FACILITIES

Our goal is for all facilities to provide meaningful connections to our region's history, reflect the Society's standard of excellence, and support the organization's reach and impact.

Outcomes we will see as a result:

- All of the organization's needs are met through best use of the facilities and community partnerships.

- The lighthouse campus exceeds visitors' expectations with engaging exhibits and site enhancements, attracting more visitors to the museum and grounds.
- Enhanced preservation that maintains the historical integrity of the buildings.
- Greater awareness of the facilities, including the Archaeology Lab, as valuable community resources for cultural and educational activities.

Objectives:

1. Conduct an evaluation of current facilities to identify areas for improvement, accessibility enhancements, and preservation needs.
2. Develop a Preservation Maintenance Manual for our historical structures, leveraging best practices to set standards for consistency and excellence in ongoing maintenance and repairs.
3. Evaluate the strategic and operational needs of the organization and determine whether they are best met by adapting current facilities or through partnerships and collaborations.
4. Enhance the visitor experience by updating the lighthouse campus with interactive exhibits, educational resources, and a plan for ongoing innovation.
5. Create and begin executing a plan for ongoing innovation at the World War II Home Front Museum and campus.

DEEPEN EDUCATIONAL PROGRAMMING AND RESEARCH

Through diverse, relevant, and accessible educational programming and active research, our goal is to deepen our region's connection to its history and its commitment to passing these stories to future generations.

Outcomes we will see as a result:

- Enhanced learning experiences for visitors, members, educators, researchers, and the public.
- Increased engagement from all stakeholder groups with interactive, substantive, and relevant programming that upholds the Society's standards for excellence.
- Growing appreciation for the region's history and the Society's role in preserving resources and fostering research.
- Expanded awareness of the Society's work throughout the region.

Objectives:

1. Develop an Education Roadmap that represents all aspects of coastal Georgia history and provides opportunities to engage all our constituents.
2. Assess and implement new technologies to support educational programming and build organizational capacity.
3. Expand educational programming for the public to reflect the Education Roadmap and facilitate new community partnerships and collaborations.
4. Provide professional development opportunities and resources to enrich K-12 history education and ensure the Society's museums are top-of-mind for educators and students.
5. Increase engagement with higher education institutions for research, archaeology, history, scholarship, and other learning opportunities.

6. Assess and refine staff roles to ensure internal capacity for growing and deepening the Society's educational role in the community.

EXPANDING AND ENHANCING COLLECTIONS

Our strategic goal in this priority is to play a leading role in assembling and protecting the collections that tell the multifaceted story of our region.

Outcomes we will see as a result:

- Collections are widely recognized by donors, scholars, researchers, and the general public as the premier representation of coastal Georgia history.
- A more comprehensive and representative collection that reflects the many people who are a part of coastal Georgia history, creating opportunities for expanded exhibits, scholarship, and educational programming.
- Ensure that the storage needs of expanded Archaeology and Collections programs are met.

Objectives:

1. Develop a comprehensive Collections Development Strategy to identify priorities and collections needs and guide acquisitions.
2. Evaluate collections storage needs as a part of the facilities evaluation process and in light of the Society's strategic priority to expand collections and the existing Collections Management Plan.
3. Create opportunities to share the collections through exhibits, digital access, and public programming.
4. Launch a Collections Initiative to prioritize active collecting, chaired by enthusiastic campaign leaders and with the support and engagement of the board and staff, cultivating relationships with donors and private collectors to grow and enhance collections.

INNOVATING FOR A SUSTAINABLE AND SCALABLE FUTURE

Our goal is to ensure sustainability and increased capacity for serving the Coastal region through education and preservation by diversifying and expanding revenue opportunities, aligning board development to strategic priorities, and increasing talented staff.

Outcomes we will see as a result:

- An ongoing commitment to aligning the budget and organizational capacity to the strategic priorities of the organization.
- Greater internal capacity with prioritized investment in talent and strategic outsourcing.
- Engaged, action-oriented board committees supporting the implementation and success of the strategic plan.
- Enhanced and sustained community engagement in the mission of preserving and sharing coastal Georgia history.

Objectives:

1. Craft a revenue plan to build sustainability and scalability for the organization, exploring new revenue streams, endowment growth, and creative solutions to expand financial capacity for strategic priorities.
2. Evaluate board committees, engagement plans, and board development opportunities to build board capacity.
3. Innovate internally with an organizational chart, talent management plan, and leadership development strategy that grows the Society's staff capacity.
4. Implement a review process to assess allocation of staff and resources to ensure ongoing capacity for strategic priorities.

IMPLEMENTATION PLANNING

After adopting this Strategic Plan, the Executive Director and senior leadership will work with staff to craft an implementation roadmap, ensuring that the organization's resources and staff align with the strategic priorities. The roadmap should include timelines for implementation and reporting, the metrics that will be reported to track progress, and who is accountable for each objective.

The Board will work with the Executive Director to ensure that the organization has the time and resources to execute the plan. The Board will align its activities with the strategic priorities adopted in this plan, and link action items and activities from committee meetings and board meetings to the strategic goals and objectives.

We enter into this Strategic Plan with a legacy of excellence that has prepared us for an exciting phase in our organization's history. To leverage our strengths and make the most of our capacity, follow up work to prepare for implementation should:

- Assess staff and board members' strengths and align roles and responsibilities to individual strengths
- Create a staff development plan to build professional capacity and develop an internal leadership pipeline
- Engage in strengths-based goal setting with staff to align staff goals with their strengths and strategic objectives
- Develop a board development plan that aligns with board strengths and strategic priorities

In a quickly changing world, it is important that the Board and Executive Director regularly revisit the implementation plan to ensure it is relevant and evolving with the needs of stakeholders and the organization.

CONCLUSION

This Strategic Plan outlines a clear, bold, and dynamic path that builds on the strengths and capacities developed over the last 60 years. It is rooted in our commitment to preserve the multifaceted and rich history of Coastal Georgia, not for ourselves, but for the many peoples who call it home. This plan embraces opportunities to connect, collaborate, and inspire our community and our visitors while preserving the history and heritage of our region.

In our strategic commitment to partnerships and community collaborations, maximizing utilization and preservation of facilities, deepening educational programming, expanding and enhancing collections, and innovating for a sustainable and scalable future, *[highlight each with icon]* we have mapped a plan strengthening our role as a trusted steward of history and a leader in heritage tourism while more intentionally being a part of the community we serve.

The success of this plan relies on the ongoing support and collaboration of our board, staff, volunteers, members, and community, and we look forward to working with you all in our mission to

connect people to Coastal Georgia's dynamic history through the stories we share and the collections we preserve.