



2022 ORGANIZATION PLAN
 Approved by the Board of Trustees - TBD

Vision: Preservation Utah lead the historic preservation effort in Utah and represent the state at the national level.

Mission Statement: Established in 1966, Utah Heritage Foundation — now Preservation Utah — was the first statewide historic preservation organization in the western United States. Preservation Utah's mission is to keep the past alive, not only for preservation, but to inspire and provoke a more creative present and sustainable future. We preserve, promote and protect Utah's historic built environment through public awareness, advocacy and active preservation.

Tagline: People Preserving Places

GOAL I: Promote meaningful community engagement with the historic built environment that educates and fosters a stewardship ethic

GOAL II: Strengthen Preservation Utah's role as the statewide historic preservation expert

GOAL III: Bring statewide visibility to Preservation Utah and its mission

GOAL IV: Develop the organization's institutional and community networks into a powerful source of expertise, outreach, and awareness

GOAL V: Safeguard the organization's long-term stability

GOAL VI: Actively work to engage the full spectrum of Utah society through educational outreach and advocacy

GOAL VII: Expand preservation's relevance to new communities and recognize the relevance of, and utilize intangible culture and other forms of heritage to more fully represent Utah's history

GOAL VIII: Expand Memorial House's outreach to include cultural and community offerings.

Objectives and Tasks

Advocacy									
Primary Goal	Sub Goals	New Objectives and Tasks	Tasks and /or Subpoints	Critical Date(s)	Quarter	Quantifiables	Staff Leads	Board Lead	Notes
V	III, IV	Migrate historic & current advocacy campaigns into Arches	Entered into Arches		Q1-4	Updated Arches	David		
I	IV	Heartbomb	Identify site and work with volunteer board to make paper hearts. Potentially Wells Wards or Douglas Ward?	Feb 14	Q1	Heart Bomb	Liz	Volunteer	
I	II, III, IV, VII	Ad Hoc advocacy	Be a community resource and inform the public of at risk properties.		Q1-4		David		
I	II, IV, VI	Main Street Program	Engage with Main Street communities throughout Utah.		Q1-4	Meet with at least 3 UMSP communities	Kelsey		
IV	I	LDS Architecture	Provo Temple, Wells Ward, Douglas Ward		Q1-4	Regular communication with the Church on issues related to historic architecture. Heritage Alert for Provo Temple with ICOMOS ISC20C	David		ongoing
III	II	Improving CLGS & municiple historic preservation ordiances	Holladay, Millcreek, West Valley City, Riverton, South Jordan		Q1-4	CLGs established, historic districts or landmarks, hp ordiances	David		
IV	I	South & West SLC	Work on issues in Ballpark, Granary, Midtown, Central 9th		Q1-4		Kelsey		
		National Trust							

Fundraising Development -Membership; Campaigns, Events									
Primary Goal	Sub Goals	New Objectives and Tasks	Tasks and /or Subpoints	Critical Date(s)	Quarter	Quantifiables	Staff Leads	Board Lead	Notes
V		Document a 'how to' of Civi	Create basic documentation about Civi - what is it used for, key things to find within it, links to Civi resources. Aim for 1-2 pages.		Q2	Document of process	Liz		
VI		Create Easement Program Promo			Q2	Designed doc	Kelsey		
VI		Create RLF Program Promo			Q2	Designed doc	Kelsey		
V		Create general fundraising brochure			Q1	Designed doc	David & Kelsey		
V	IV	High Level Donor Outreach	Identify high level donors within our network and beyond. Outreach to potential high level donors.		Q1-4	Obtain 3 new or reestablished high level donors for Q1.	David		
V	VI	Utilize preservation grants service	Work with Tracey to apply for more grants throughout the year.	Q2 Identify useful grants to apply to or to maximize	Q2 ongoing	Q1 - establish working plan	David	Tracey	
		Establish Development Committee	Obtain a few board members and others (ideally grant writers & schmoozers). Work towards writing grants, finding donors, membership.		Q1-2		David		
V		Corporate Donors/Sponsors	Make corporate donor list that is updated throughout the year.		Q3		Kelsey		
		Donor Mgmt System	Explore implementing Auxilia		Q1		Kelsey		

I		New Fundraiser or Upgrade a New Event	Donut Dash doesn't fit with goals, figure out a new fundraiser that could make comparable funds (\$5k). Work with board / development committee.		Q1-4		David	Board	
I	III	Annual Homes Tour	Obtain a \$3-5k sponsor.	May 21	Q1-2		Liz & David	Board	

**Historic Programs
Historic Properties Committee (Easements, Revolving Loan Funds)**

Primary Goal	Sub Goals	New Objectives and Tasks	Tasks and /or Subpoints	Critical Date(s)	Quarter	Quantifiables	Staff Leads	Board Lead	Notes
I		Training docs of RLFs	Training guide of the RLF process for staff members.		Q2		Kelsey		
V		Easement Amendment Policy	Establish an easement amendment policy for program. HPC & Board approval.		Q1-2	Policy	Kelsey		
V		Easement extinguishment Policy	Establish an easement extinguishment policy for program. HPC & Board approval.		Q3-4	Policy	Kelsey		
II		Easement - Arches (2021)	Migrate 2021 inspection data over		Q1		Kelsey	Ronnie	
II		Easement - Arches	Migrate historic easement data over. Prioritize red and orange flag properties from 2021.		Q2-4		Kelsey	Ronnie	
II		Preservation Directory - Arches	Migrate historic data into arches & continue to update new applicants into the new directory.		Q1		Kelsey	Ronnie	
I	III	HPC Education & Awareness	Produce new signs that signify that a property has received a loan from Preservation Utah. Should also instruct people who see the sign how to find information about the RLFs.		Q3	Signs ready	Kelsey		
III	IV	Expand Statewide Loan Fund	Establish place on the website people can donate specifically to the loan fund - reach out to foundations, donors, etc.		Q3		Kelsey		
		Gateway Loan							
II		Reestablish Contract with SHPO for Directory	Find previous documentation of SHPO's contract to hire Preservation Utah for the directory and reestablish. Add Corey Jenson's contacts.		Q2		Kelsey Assist: Liz		Discussion started with Steve in Feb, as of March he is speaking with Chris.
VI	III, IV	Update & Improve Loan Process	Investigate ways to diversify loan applicants and create a new process that makes the loans accessible to need-based applicants.	online application - Q2 all others - Q3	Q3		Kelsey Assist: David	Chris T.	
V		HPC Development	Ensure clear and consistent communication is maintained regarding the goals and values of Preservation Utah with the HPC and that new members are given a brief orientation to their responsibilities.		Q3		Kelsey		
I		Sustainability Programming	Create a series on sustainability in HP events (lectures, workshops, etc)		Q1-4		Kelsey		
I		Historic Window Workshop Series			Q1-4		Kelsey	HPC	
I		Restore - Habitatat Partnership	Sustainability						

Education

-Tours; Lecture Series; Speaking Engagements; School Outreach; Partnerships Programs; Salt Lake Modern Committee; Volunteer Board

Primary Goal	Sub Goals	New Objectives and Tasks	Tasks and /or Subpoints	Critical Date(s)	Quarter	Quantifiables	Staff Leads	Board Lead	Notes
I	III	Annual Homes Tour	Flush out new volunteer structure.	May 21	Q1-2		Liz		
I	III	Utah Heritage App	Finish: South Temple tours, City & County building, Magna Main Street, etc. Utilize Bim to reach May deadline.	June	Q2		Liz Assist: David		
		Tom Carter - Funds	VAF Legacy - have a convo with Tom about funds. Could it be used for Main Street?		Q1-2		David		
I	III	K-6 Outreach	Participate in ZAP Summer Passport program. Reevaluate for future years. Create a structure for it by the end of year.		Q1-3		Liz		X
I	III	K-12 Outreach	Follow up on STEAM nights about producing an online activity.		Q2-3		Liz & new Edu Staff		
III	IV, V	Heritage Awards	Plan the annual Heritage Award event, but also incorporate the Annual Gala into it. It will continue to serve as large fundraiser.		Q1-3		Staff		
I	VI	Tours: Kearns, McCune, SLCCB, etc.	Reestablish tours for 2022. Governor mansion most likely can't do school tours but can do public tours. Look into doing more McCune and SLCCB.		Q1-4		Liz		
VI	VII	Expand Types of Tours	Specifically create tours that focus on social communities versus only built environment. Ideally have a Black Utah and LGBTQ+ tour (Randy Hoffman). Potential collaboration with Queer Historical Society, Black Chamber of Commerce & Black Genealogical Group.		Q3	2 new tours	Kelsey		
I	V	Promote historic preservation as a tool for sustainability	Develop more robust messaging surrounding the sustainability of historic preservation. This can be promoted via social media, on our website, within our communications, etc.	Ongoing, but tangible results by the end of Q3	Q3		All Staff		Used in messaging, needs to be developed further in 2022.
VI	I	K-6 Outreach	Review the K-6 Preservation Utah classroom presentations (created by Adele). Double check that we don't have existing materials that overlap.		Q4		David		

I	V	Volunteer Program	Recruit new volunteers and maximize their skillsets. Create volunteer position descriptions and basic orientation. Create a Google form for volunteers to submit to let us know what they are good at and what they'd like to get involved in.	Q1 volunteer position descriptions Q2 Orientation materials	Q1-4		Staff		
I	IV, VI	Salt Lake Modern Committee	Have a meeting with SLM committee leadership.		Q1-4		David Assist: Cindy		Bim's Tour completed Q1, launch in Q2
II		Table Community Events	Tabling at annual events including Avenues Street Fair, Utah History Day, Marmalade Jam Fest, 9th and 9th Street Fair. Identify other opportunities as they arise and participate as COVID allows.	Q1 - find calendar events & commit Q2 - finalize if we are going	Q2-4		All Staff		9th & 9th Street fair, but could do more.
I	II, IV	Free Tours	Extend the tour season from mid-late spring to early fall. Also offer more time options that are evening or weekend.		Q1-3		Liz		In progress of planning summer tours
		Stone Tour	Maria				Liz		
II	I	Printed Newsletter	Establish a printed newsletter every 4 months (March, July, Nov). Reevaluate who receives the printed version. Make sure those who have donated or given money through programs receive it. Create a template (ie. local, statewide, marginalized, etc.). For when we have an Education/Outreach Person.		Q3-4		Kelsey		
I	VI	Private Tours	Establish a robust plan for private tours - payment or no, training of guides, etc.		Q3		All Staff		

Memorial House

Primary Goal	Sub Goals	New Objectives and Tasks	Tasks and /or Subpoints	Critical Date(s)	Quarter	Quantifiables	Staff Leads	Board Lead	Notes
V		Business Plan Part I	Marketing Analysis		Q1				
V		Business Plan Part II	Marketing	Fdeb 1, Feb 11, April 1	Q1-2		Lindi		RMB print, UB&G print, Main St Kiosk
V		Garden Plan (PUT)	Work with James on a small scale plan (ideally how we can thoughtfully place lavender) for at least one specific plant.		Q1-3	Lavendar/or other plant planted.	Lindi		
V	I	Garden Plan (City)	Work with Salt Lake City and contacts (James) to update and improve landscaping.	April	Q2		Lindi		May 14th - service day with city & volunteer group. City supplies items? James Batton-designer, Freida Hamilton-implement design, Kayesha Belnap-hourly paid/weekly
V	I	Upgrades	Flagstone		Q1		Lindi		
V	I	Upgrades	French Doors		Q1		Lindi		
		Vent Cleaning	Clean the vents.		Q1-2		Lindi		
		Electrical	Kitchen, bathroom, and office electrical updates. Will help with sustainability goals.		Q1-4				
V	I	Lease	Explore lease options - renegotiate as the outside is not cared for. Note heating and swamp cooler issues.	Nov - new lease needs to be signed	Q1-4		David and Lindi		Waiting until MH Mgr is onboard to include in the conversation.
V		Create Brand & Style Guide	Priority 1				Lindi		Hire graphic designer, style guide.
V		Rebrand MH Website	Priority 2				Lindi		Joomla workshops

Admin

-Board Development; Partnership Development; Professional Development; Technology; Staffing; HR

Primary Goal	Sub Goals	New Objectives and Tasks	Tasks and /or Subpoints	Critical Date(s)	Quarter	Quantifiables	Staff Leads	Board Lead	Notes
V		Create/update office policies	1. Returning to paying unemployment 2. Explore adding life insurance 3. Update Leave of Absence 4. Update Paid Leave Policy		Q1	Finished policies	David Assist: Liz		
V		Create/update office policies	1. Update Leave of Absence 2. Update Paid Leave Policy		Q1	Finished policies	Kelsey Assist: David		
V		Personnel Manual	Create a new manual that is specific to HR. Clean up/remove programming/procedure doc elements.		Q2	Updated Manual	Liz Assist: All Staff		
V		Organize Shared Drive	Organization of the shared drive to match the organization plan (i.e. main categories as Advocacy, Fundraising, Education, Programs, Memorial House, Admin.) Prioritize HR/Office/Org docs in Q1. Meet bimonthly to organize.	Ongoing	Q1-Q4	Clean shared drive	All Staff		
V		Board-office policies	1. Board & Staff relationship document - include an annual one-on-one check-in by one member of the exec committee with all members of staff. 2. Staff protections to contact board regarding the Executive Director doc	Feb. Review	Q1		David		

V		Board Orientation Packet	Update the Board Orientation Packet	Feb 4 - First Draft Feb 18 - Final Draft	Q1		Liz		
		Board Retreat	Host board retreat,	March 5	Q1		All Staff		
V		Call for Board Members & Board Development	Develop a thoughtful & strategic plan that focuses on diversifying & attaining engaged members.		Q3-4	2-4 new members	Kelsey		
V		Prepare 2021 Annual Report	Pull Data - Liz; Summarize Data - David; Make pretty - Kelsey	March - Rough Draft April - Final Draft	Q2		All Staff		
V		Job Descriptions	Exec Dir will develop individual annual workplans & job descriptions.		Q1		David		
V		Social Media	Announce new board members and highlight existing ones through social media channels.	Ongoing	Q1-4		David		
V		Sustainability	Look for ways to improve the sustainability from within the organization. Minimize overbuying food, avoid single use plastics, recycle in the office.	Ongoing	Q1-4		All Staff		
V		Professional Development	Provide at least 1 professional development opportunity to each staff member funded by the organization - the cost is approved by the Executive Director. \$500 with the opportunity for negotiation. Discuss with Shalaun the opportunity to roll this money over year to year.		Q1-4		All Staff		
V		Donor Management System	Looking into options. Meet with Auxilia - automate donor emails		Q1-4		Liz		
V		Staff Reviews	Exec Dir hold staff reviews in January / Summer. Complete job description exercise and benchmark document completed and discussed for Part 1. It would be reviewed in Part 2.	Jan / Summer	Q1-4		David		Liz & Lindsi complete, Kelsey is in Dec.
		Website Updates	Potential areas to tackle: new home page, layout		Q1-2				
V		Website Content Updates	Go through the 'Resources' section first to update the content of this section.	Ongoing	Q1-4		Liz		