



# Strategic Plan

FY21-FY25

Executive Overview

May 22, 2020

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# EXECUTIVE SUMMARY

## Overview

In early 2020, Preservation Austin assembled a task force chartered with stewarding a comprehensive strategic planning process design to position and transform the impact Preservation Austin can and should have in Austin. From the beginning, this process was envisioned to be data informed and highly collaborative. To that end, over 50 stakeholders were interviewed, and virtual collaborative sessions and tools were used to ensure that the Board's input was heard and incorporated.

It should be noted that this is the second time Preservation Austin has formalized a long term strategic plan since 2013, and the next two years (FY21-FY22) are identified as the years to build the foundation to accelerate results, establish a defining culture and expand the landscape of opportunity and impact in Austin. It should be noted that as part of this co-creative process, Preservation Austin's mission has evolved, and we have added a clear vision and defined values that will guide our decision making, brand and culture going forward.

For purposes of this strategy, Preservation Austin recognizes three (3) key stakeholder groups that we explicitly serve: Occupants and Owners of Older and Historic Buildings; Design, Building, and Development Communities; Cultural Communities and Districts. We believe that if we serve these well, the ripple effect of their influence throughout Austin exponentially increases our opportunity for tangible impact. We also believe that by engaging explicitly with the following audiences as "levers" and partners we can accelerate our mission and vision for Austin in alignment with our values: Neighborhood Influencers and Civic Leaders, Anti-Displacement Advocates, Built Environment Nonprofits.

Throughout our strategy, Preservation Austin maintains 100% commitment to creating tangible evidence of our work that can be experienced by Austinites in meaningful and actionable ways. However, in order to deliver on this promise long term, Preservation Austin must align our resources and efforts to developing all five (5) enduring focus areas, using rigor and clear measures of success to drive our decision making, and build the capability throughout the organization to tell our story in more visible and actionable ways.

Below is the "frame" for Preservation Austin's 5-Year Strategy.



## Five Year Strategy

### MISSION + VISION

We exist to empower Austinites to shape a more inclusive, resilient, and meaningful community culture through preservation.

When Preservation Austin delivers on our strategy, we will create a future where historic places play a meaningful role in everyone's life, inspiring all Austinites to become advocates for preservation.

### OUR VALUES

We are accountable, inclusive, and locally focused.

We lead by collaborating enthusiastically, taking the long view, and thinking big.

### FOCUS AREAS

#### Community Engagement

Amplify our role as a proactive voice for preservation



Establish a diverse support base through proactive advocacy and awareness.



Strong Brand Identity across all audiences: 5X Social Media Engagement, Voice of the Community (70+ NPS)

#### Partner for Momentum

Develop an ecosystem that optimizes collaboration



Build bridges through key relationships across and throughout Austin.



Partners dashboard: Attraction, Engagement, Retention, Reciprocity, Policy Impact

#### Tangible Impact

Broaden our impact and the visibility of our work



Activate historic spaces and places in every part of Austin.



Visible evidence of our effort and impact: Preservation Scorecard (e.g., projects launched, targets saved, etc.)

#### Experiential Preservation

Deliver "sticky" Austin experiences that educate and inspire



Expand our community's understanding of 21st century preservation



People Engage: 2x engagement in experiences delivered with 90+ Satisfaction and x% of repeat engagement

#### Invest in Our Future

Build a foundation for accelerated growth and impact



Secure the talent and treasure to fund and staff our "big bets."



Double our operating budget, 3X our membership, 2X Volunteer base, Diversity matches Austin demographics

## Now What

Preservation Austin's Board of Directors has been invited to provide input and comment throughout the planning process, and the following represents the Executive Strategy that the board will have the opportunity to endorse on Wednesday, May 27, 2020. Following this endorsement Executive Director Lindsey Derrington, in collaboration with the Board and Committee Chairs, will build out detailed action plans, assignment of responsibility and reconciliation of resources to ensure the strategy is relevant and actionable over the next two years. This work will be completed over the 2020 Summer and presented to the Board upon reconvening for FY21 in September<sup>1</sup>.

<sup>1</sup> The included 30-60-90 Day Plan details the scope of detail to be worked out over the 2020 Summer.

## What We Believe + How We Will Show Up

As we execute our strategy, the following principles fundamentally drive how we make decisions, prioritize ideas, and overall create an environment that inspires, engages, and motivates our Staff, Board, Committees, Members, Volunteers and Donors.

### We are:

**Accountable.** We are committed to doing what is right, not being right, by keeping the best interests of those we serve top of mind, not our individual agendas. We measure our impact against the highest standards of integrity, equity, and fiscal responsibility.

**Inclusive.** We are committed to building a culture that encourages, supports, and celebrates the diverse voices of our organization and city. We believe diversity and inclusion together fuels our creativity, breaks down barriers, and brings us closer to the people we serve.

**Locally Focused.** We have Austin's best interest at heart every day. We believe that preserving Austin's individuality and uniqueness will allow all our citizens to thrive, visitors to connect, and our city to be the example of preservation in action.

### We lead by:

**Collaborating Enthusiastically.** We do our best work when we come together to solve some of the most pressing challenges facing our city today. We value those who speak thoughtfully, encourage and respect diversity of opinion, and listen carefully with an open mind.

**Taking the Long View.** We leverage our resources to have the greatest possible impact and hold ourselves accountable to future generations by saving places that matter, that stand the test of time, and that honor a holistic view of Austin's heritage.

**Thinking Big.** We never settle. We have the courage and curiosity to actively challenge the status quo and find new ways for preservation to have a positive impact in our community.

## The Plan on a Page<sup>2</sup>

The following Executive Strategy is referred to as Preservation Austin’s “plan on a page.” Its purpose is to provide the frame for the 5-Year Strategy on the front and the commitments to the work we are prioritizing by Focus Area on the back. It is anchored in Preservation Austin’s Strategic Principles (“what we believe”):

- Preservation and growth must coexist to create a world-class city.
- Preservation is only as meaningful as the degree to which it touches people’s lives.
- We create meaning by connecting people with spaces and stories.
- Fostering inclusion and diverse perspectives broadens our reach and strengthens our impact.
- Advocacy is a collaborative activity.

For each of the focus areas and foundational components, Preservation Austin has defined priorities designed to deliver measurable results, accelerate the mission and vision, and ensure we live the values we have declared as fundamental to our success. These priorities represent WHAT we need to do.

These priorities will drive the way we make decisions, communicate, and evolve Preservation Austin going forward. They will also inform the allocation of resources—people, time, and money—and will provide clarity and structure to our work and deliverables over the next two years.

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<sup>2</sup> See Exhibit A

## FY21-FY22 Priorities for our Five Enduring Focus Areas

### Community Engagement

Over the next 5 years, we aim to amplify our role as a proactive voice for preservation throughout Austin by establishing a diverse support base through proactive advocacy to raise awareness, understanding and commitment in the community. We will know if we are successful when we can quantitatively measure a consistently strong brand identity across all audiences through metrics such as: 5X Social Media Engagement, Voice of the Community (70+ NPS), media coverage, and others as appropriate.

- Communicate a dynamic, compelling narrative that connects a diverse audience to how our work and preservation improves lives.
- Build trust and confidence with new audiences to make preservation personal and relevant deep into our communities.
- Expand our leadership visibility in discussions and decisions regarding place making and locally significant spaces throughout Austin.

### Partner for Momentum

Over the next 5 years, we aim to develop an ecosystem that optimizes collaboration by building bridges through key relationships across and throughout Austin. We will know if we are successful when we can quantify the quality of our partner relationship via a dashboard that measures metrics such as: attraction, engagement, retention, reciprocity, policy impact and others as appropriate.

- Map existing relationships and identify areas of improvement or expansion.
- Form people-focused relationships with existing and new strategic partners--both private and nonprofit--to accelerate the impact of preservation in Austin's growth agenda.
- Proactively identify, prioritize, and propose policy solutions by building coalitions to solve preservation challenges.

### Tangible Impact

Over the next 5 years, we aim to broaden our impact and the visibility of our work by activating historic spaces and places in every part of Austin. We will know if we are successful when we can quantify the visible evidence of our effort and impact through a Preservation Scorecard that includes metrics like: #projects launched, #targets saved and other relevant measures.

- Define a strategy that channels more financial resources into the community.
- Establish the criteria that will build a portfolio of projects we actively engage with through our target audiences.
- Align with complementary allies in affordable housing, sustainability, and community economic development.

### Experiential Preservation

Over the next 5 years, we aim to deliver "sticky" Austin experiences that inspire and educate to expand our community's understanding of 21st century preservation. We will know we are successful when we can quantify who and how people are engaging with historic spaces and places with an increase of 2x engagement in experiences delivered with 90+ Satisfaction and X% of repeat engagement.

- Conduct an end-to-end audit of all existing events and programs for relevance and impact.
- Deliver unique, high-impact programming that offers experiences that cannot be found anywhere else.
- Cultivate the next generation of preservationists.

### Invest in Our Future

Over the next 5 years, we aim to build a foundation for accelerated growth and impact by securing the talent and treasure to fund and staff our "big bets." We will know we are successful when we can double our operating budget, 3X our membership, 2X Volunteer base, and the diversity of our organization matches Austin demographics.

- Build relationships with high-capacity donors and funders to support and enhance our work.
- Multiply in size, diversity, and engagement of membership and volunteer base.
- Build staff capacity to administer and grow existing and future programs.

**The following components of running a high performing organization are foundational, require resources and will require a percentage of Lindsey Derrington's attention as Executive Director.**

- **People & Culture:** We must continuously unlock the full potential of the organization by establishing an enduring people strategy to attract, retain and optimize the organization (Staff, Board, Members, Committees)
- **Structure & Governance:** We must continuously evaluate and optimize how we organize around our work to maximize productivity, alignment, quality decision making, and effective communication.
- **Resource Alignment:** We must continuously review, develop and deploy metrics that improve outcomes, use of resources (talent: Board, Staff, Volunteers, time, and treasure), and balance margin and mission for financial accountability.
- **Strategic Impact:** We must design and deploy relevant feedback loops, listening posts and accountability metrics that inform and empower "how we are doing" against our stated goals, what we are learning, and how we need to adjust.

## Next Steps<sup>3</sup>

### Action Planning

An Action Plan visualizes the alignment of Preservation Austin's Mission, Vision, Strategy, Tactics, Resources, and Metrics for each fiscal year. Specially, Preservation Austin's Action Plan will ADD Tactics and Metrics.

**Tactics** – the coherent actions we will take. These represent the hypotheses to be tested and the work to be done to implement the strategies in the form of experiments. These tactics should be specific, actionable and time bound.

**Resources** – clear roles and responsibilities. For each tactic, we will define who is responsible, contributing, executing.

**Measures of Success** – the outcomes that indicate progress. These are the leading indicators which provide quick and frequent feedback on whether the tactics are having an impact on meeting the Big Picture Objectives.

**The payoff?** Action planning is a collaborative process of co-creation and clarification to get literally everyone on the same page about the work that needs to be done to succeed. Used to its full potential, the Action Plan is the catalyst to strategy deployment, helping to guide discussions and decisions about what changes to make, why to make them, and how to assess them.

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<sup>3</sup> See Strategic Planning work plan in Exhibit C.



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## PRESERVATION AUSTIN 2020

### 30-60-90 Day Sprints (Draft)

Lindsey Derrington will lead the following “sprints” over the next 30-60-90 days (2020 Summer) to set the approved Strategy up for success when Preservation Austin’s Board and Committees reconvene in September 2020.

June 2020	July 2020	August 2020
<ul style="list-style-type: none"><li><input type="checkbox"/> Governance &amp; Structure adjustments to optimize the work</li><li><input type="checkbox"/> Collect all current state work from Committees and Staff</li><li><input type="checkbox"/> Map to the Plan on a Page</li><li><input type="checkbox"/> Define start, stop, continue</li><li><input type="checkbox"/> Develop first round of Action Plans for the next fiscal year</li><li><input type="checkbox"/> Gap analysis of resource (people, time, \$\$)</li></ul>	<ul style="list-style-type: none"><li><input type="checkbox"/> Finalize metrics for each Focus Area</li><li><input type="checkbox"/> Design Program Scorecards and Dashboards</li><li><input type="checkbox"/> Evolve the second round of Action Plans to address and close resource gaps appropriately</li></ul>	<ul style="list-style-type: none"><li><input type="checkbox"/> Design operating mechanisms relevant to “running the business”</li><li><input type="checkbox"/> Storytelling Workshop (crafting the narrative)</li><li><input type="checkbox"/> Align and develop brand and marketing portfolio</li><li><input type="checkbox"/> Design Kick Off workshop for the Board (September 2020)</li></ul>

# PRESERVATION AUSTIN 2020

## Exhibit A: Plan on a Page

**Priorities for Success**

**Our Mission** Preservation Austin exists to empower Austinites to shape a more inclusive, resilient, and meaningful community culture through preservation.

**Our Vision** When Preservation Austin delivers on our strategy, we will create a future where historic places play a meaningful role in everyone's life, inspiring all Austinites to become advocates for preservation.

<h3>01</h3> <p><b>Community Engagement</b></p> <p>Amplify our role as a proactive voice for preservation</p> <p>Establish a diverse support base through proactive advocacy and awareness.</p> <p>Strong Brand Identity across all audiences: 3X Social Media Engagement, Voice of the Community (70+ NPS)</p>	<h3>02</h3> <p><b>Partner for Momentum</b></p> <p>Develop an ecosystem that optimizes collaboration</p> <p>Build bridges through key relationships across and throughout Austin.</p> <p>Partners dashboard: Attraction, Engagement, Retention, Reciprocity, Policy Impact</p>	<h3>03</h3> <p><b>Tangible Impact</b></p> <p>Broaden our impact and the visibility of our work</p> <p>Activate historic spaces and places in every part of Austin.</p> <p>Visible evidence of our effort and impact: Preservation Scorecard (e.g., projects launched, targets saved, etc.)</p>	<h3>04</h3> <p><b>Experiential Preservation</b></p> <p>Deliver "sticky" Austin experiences that educate and inspire</p> <p>Expand our community's understanding of 21st century preservation</p> <p>People Engage: 2x engagement in experiences delivered with 90+ Satisfaction and % of repeat engagement</p>	<h3>05</h3> <p><b>Invest in Our Future</b></p> <p>Build a foundation for accelerated growth and impact</p> <p>Secure the talent and treasure to fund and staff our "big bets."</p> <p>Double our operating budget, 3X our membership, 2X volunteer base, Diversity matches Austin demographics</p>
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### 2021-22 PRIORITIES

Community Engagement	Partner for Momentum	Tangible Impact	Experiential Preservation	Invest in Our Future
Communicate a dynamic, compelling narrative that connects a diverse audience to how our work and preservation improves lives.	Map existing relationships and identify areas of improvement or expansion.	Define a strategy that channels more financial resources into the community.	Conduct an end-to-end audit of all existing events and programs for relevance and impact.	Build relationships with high-capacity donors and funders to support and enhance our work.
Build trust and confidence with new audiences to make preservation personal and relevant deep into our communities.	Form people-focused relationships with existing and new strategic partners—both private and nonprofit—to accelerate the impact of preservation in Austin's growth agenda.	Establish the criteria that will build a portfolio of projects we actively engage with through our target audiences.	Deliver unique, high-impact programming that offers experiences that cannot be found anywhere else.	Multiply in size, diversity, and engagement of membership and volunteer base.
Expand our leadership visibility in discussions and decisions regarding place making and locally significant spaces throughout Austin.	Proactively identify, prioritize and propose policy solutions by building coalitions to solve preservation challenges.	Align with complementary allies in affordable housing, sustainability and community economic development.	Cultivate the next generation of preservationists.	Build staff capacity to administer and grow existing and future programs.
<b>To deliver value and impact we relentlessly &amp; continuously focus on Operational Excellence</b>				
<b>People &amp; Culture:</b> Unlock the full potential of the organization by establishing an enduring people strategy to attract, retain and optimize the organization (Staff, Board, Members, Committee)	<b>Structure &amp; Governance:</b> Optimize how we organize around our work to maximize productivity, alignment, quality decision making, and effective communication.	<b>Resource Alignment:</b> Develop & deploy metrics that accelerate outcomes, allocate resources (talent-Board, Staff, Volunteers, time, and treasure) effectively, and balance margin and mission for financial accountability.	<b>Strategic Alignment and Impact:</b> Design and deploy relevant feedback loops, listening posts and accountability metrics that inform and empower "how we are doing" against our stated goals, what we are learning, and how we need to adjust.	

## Our Values

### WE ARE



#### ACCOUNTABLE

We are committed to doing what is right, not being right, by keeping the best interests of those we serve top of mind, not our individual agendas. We measure our impact against the highest standards of integrity, equity, and fiscal responsibility.



#### INCLUSIVE

We are committed to building a culture that encourages, supports, and celebrates the diverse voices of our organization and city. We believe diversity and inclusion together fuels our creativity, breaks down barriers, and brings us closer to the people we serve.



#### LOCALLY FOCUSED

We have Austin's best interest at heart every day. We believe that preserving Austin's individuality and uniqueness will allow all our citizens to thrive, visitors to connect, and our city to be the example of preservation in action.

### WE LEAD BY



#### COLLABORATING ENTHUSIASTICALLY

We do our best work when we come together to solve some of the most pressing challenges facing our city today. We value those who speak thoughtfully, encourage and respect diversity of opinion, and listen carefully with an open mind.



#### TAKING THE LONG VIEW

We leverage our resources to have the greatest possible impact and hold ourselves accountable to future generations by saving places that matter, that stand the test of time, and that honor a holistic view of Austin's heritage.



#### THINKING BIG

We never settle. We have the courage and curiosity to actively challenge the status quo and find new ways for preservation to have a positive impact in our community.