The Coronado Historical Association advances learning and stewardship in all by serving as Coronado's primary center for community history.

FOR IMPLEMENTATION: July 2023 to June 2026 with annual adjustments.
LETTER FROM THE EXECUTIVE DIRECTOR, CHRISTINE STOKES

We are so pleased to welcome you into our process for strengthening and developing the Coronado Historical Association. This 2023-2026 Strategic Plan will guide our work through the next three years.

The Coronado Historical Association was established in 1969 by a group of concerned citizens with an eye toward saving the intriguing history of a unique community. Their first goal was an inspired one: to raise funds to save and convert a Coronado ferry that had been retired with the opening of the Coronado Bridge into a museum. When that goal proved to be beyond reach, the Association took on an active stewardship posture, vigorously seeking artifacts, records, photos, and remembrances of Coronado’s past.

Over the years, CHA’s headquarters moved locations as the collections and vision grew. In 1999, philanthropists Don and Leslie Budinger began gifting the iconic historic Bank of Commerce building at 1100 Orange Avenue. The move to the new building, which opened to the public in October 2000, resulted in the creation of three exhibit galleries, a research center, professional collections storage vault, and museum store and cafe.

This move and transformation would not have been possible without the visionary and philanthropic assistance of Mr. & Mrs. Budinger. In a major gift, the Budingers arranged a lease-gift agreement to allow CHA to take early title to the building in 2021 for $2 million, approximately 25% of the then appraised value. CHA obtained affordable financing from First Republic Bank through municipal bonds issued by the California Enterprise Development Authority.

With the transfer of the title of 1100 Orange, CHA has secured our home into the future. As we look toward that future and embark on this strategic plan, we will take the steps to continue to sustain CHA. Over the last five years, CHA has weathered a number of financial and operational challenges. From City of Coronado’s nonprofit funding model changes to the pandemic that closed our doors for over 200 days, CHA has adapted to stay true to our mission.

Despite these challenges, CHA continues to offer a year-round schedule of public programs for both youth and adults, as well as rotating museum exhibits and robust research services. We remain the community’s trusted historian. For over 52 years, CHA has been Coronado’s leader in education and advocacy to protect our precious architectural heritage.

For a nonprofit organization, our values are what lay the groundwork for great strategic planning. Here at CHA, our staff, board, volunteers, members, and community value local history and use it to enrich lives by creating connections to Coronado’s past and the preservation of our community’s heritage. In realization of this value, this strategic plan creates the path for CHA to educate, inform, and bring our community together within and outside our museum.

I am grateful to my wonderful colleagues, our engaged and devoted board members, and to thoughtful community members like you for offering your ideas and expressing your needs from your history organization. With your guidance, we will be a museum that serves you—all of you—with purpose and inspiration. It is only with your support that CHA remains a trusted voice and champion of Coronado.
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PICTURED: One of the Oxford Hotel buildings being relocated to the grounds of the Hotel del Coronado during a historic preservation initiative, spearheaded by CHA, to save the important structure from demolishment. 1983. Coronado Historical Association Collection. Catalog number 1900.11.01-88.
EXECUTIVE SUMMARY

From 2019 to 2022, the Coronado Historical Association (CHA) board and staff, led by the Ad Hoc Strategic Planning Committee underwent an intensive strategic planning process. The process included extensive community engagement, several board and staff retreats, a survey of institutional documents, general staff organizational assessment, and a community and membership survey. Over three years, the Strategic Planning Committee documented the successes of CHA in attaining levels of museum accreditation via the American Alliance of Museums as well as the American Association of State and Local History. Key dates and accomplishments pertaining to the organization's strategic planning are included in Appendix D: Key Dates.

Acknowledging the need for external review to provide additional perspective to the strategic planning process, in June 2022, CHA engaged Resilient Heritage, an Austin-based arts, culture, and heritage firm led by Principal Daniel Ronan. The request for proposals called for a strategic planning professional to synthesize the products created by the board and staff to complete the organization's final strategic plan. This document is the result of this call for proposals.

On June 17, 2022, Daniel Ronan met with the board and staff of the Coronado History Association at its offices to become acquainted with the organization and to listen to CHA’s strongest supporters. Resilient Heritage noted the board’s desire to build an organization committed to historic preservation, community engagement (especially newer residents to Coronado), and bolstering associations with the island’s military families and community history.

In consultation with CHA staff, Resilient Heritage reviewed the organization’s board and organizational policies, finances, consultant reports, grants, fundraising documents, presentations, reports, notes, agendas, including the organization’s own SWOT (Strengths, Weaknesses, Opportunities and Threats analysis) to present the following Strategic Plan. (A full list of materials reviewed may be found in Appendix E: List of Materials and Documents Reviewed.) This plan follows several meetings between Resilient Heritage and CHA staff to outline the course of the organization over the next three years, 2023 to 2026, depending on external factors and ongoing progress in attaining the following strategic outcomes.

THREE STRATEGIC OUTCOMES

Outcome 1: A Trusted Institution

Outcome 2: A Building That Leads to Museum Accreditation

Outcome 3: A Capacity to Elevate History

These three outcomes will focus CHA in centering its mission, community role, and future direction both within and on behalf of Coronado, its history, and its relative institutional identity. Supported by corresponding programmatic goals, these outcomes will provide CHA board and staff with maximum flexibility to reach timely developmental milestones in the organization’s trajectory over the next three years.

Building off of the work of the board and staff to redefine the Coronado Historical Association through the strategic planning process, the following mission statement should be considered while reading this document:
MISSION

CHA advances learning and stewardship in all by serving as Coronado’s primary center for community history.

This mission defines the work of the organization. CHA board and staff desire to bolster its work in exhibits, collections, and community engagement. To achieve this, Resilient Heritage recommends the ultimate objective of museum accreditation.

Throughout the document, museum accreditation features prominently in the goals of the desired outcomes, tasks, and measurements. Resilient Heritage views museum accreditation as the ultimate target for the organization’s strategic positioning in Coronado as well as in the broader region as a community history center. This view is supported by the feedback and perspectives shared by the board and staff in addition to community input CHA gathered throughout its strategic planning process.

PICTURED: Children from Miss Bunny’s School take a ride on the ferry during its last day in service. 1969. Coronado Historical Association Collection. Catalog number 1900.37.03-18.
INTRODUCTION

During the strategic planning process, the board and staff made specific reference to past successes of the organization in serving Coronado as the only history-specific organization. To build on these successes, and offer a deliberate direction for future growth, a selected number of these successes are included below to showcase the organization’s hard work and diligence in delivering its mission.

SELECT SUCCESSES ACHIEVED IN THE PAST FIVE YEARS

External / Community Success

• The securing of CHA’s museum building at 1100 Orange Avenue Coronado, CA 92118, in 2020, as the organization’s headquarters in perpetuity.
• The well-attended exhibitions that have covered under-researched topics such as the Japanese American experience in Coronado.
• The award-winning exhibitions Stockdale: Character, Community and Leadership and The League of Wives: Vietnam’s POW/MIA Allies & Advocates documenting the career of Coronadan Vice Admiral James Stockdale and the efforts of his wife Sybil Stockdale to advocate the return of her husband and his fellow soldiers from captivity in Vietnam.
• Other dynamic exhibits include John D. Spreckels: The Man | The Legacy, Coronado’s Golden Age of Film, Irving J. Gill: Coronado Refined, and Coronado Schools: Celebrating 100 Years of Islanders.
• The acquisition of the Stockdale collection, noted by CHA’s Curator of Collections as a collection worthy of the Smithsonian.
• The continual success of the Mother’s Day Historic Home Tour and the Going the Extra Mile (GEM) home award.
• The active educational efforts to preserve Coronado’s built environment.
  ◦ Publication of bi-monthly newsletter Heritage Bulletin that reaches over 3,000 subscribers.
  ◦ Development of a community-wide preservation month and symposium.
• The development of the CHA/CHS High School Internship Program to accompany the successful Third Grade History and Junior Historian Program partnership with all local schools.
• The creation of the Avenue of Heroes program with the City of Coronado.
• Cultivation of an ongoing partnership with the California State Library to digitize highly requested and vulnerable collections materials.
• The development of the annual Collections Luncheon, now a hallmark fundraiser and educational event that provides critical financial support for the collection.

Organizational / Internal Success

• The alignment of CHA to common practices in non-profit management to showcase improved transparency and financial accountability.
• The shift away from the Visitor Center as a part of CHA mission to an institution that values and centers history and the museum experience, and accompanying rebalancing of resources from the Visitor Center to museum operations and protection of CHA’s collection.
• Reclaiming of much-needed research center and office space that was previously leased.
• Maintaining a successful membership program that has helped sustain the organization’s overhead costs.
• Growth of the CHA’s Research Services to a capacity to serve over 300 researchers a year.
• The engagement of new members in the organization’s Board of Directors.
Noting the breadth of accomplishments the Coronado Historical Association has completed with full-time employment of only 3.5 staff, the organization has proven both its competence and expertise in serving its community through its unique and storied history. To ensure the organization continues to deliver on its mandate as Coronado’s primary center of community history, a SWOT analysis, detailed below, demonstrates how CHA can grow. The SWOT analysis, conducted by the board and staff of CHA, lays the critical groundwork and general background for the formation of the Strategic Outcomes, detailed further in this plan.
SWOT ANALYSIS

As noted by Allison and Kaye\(^1\)*, one of the definitive texts for strategic planning for nonprofit organizations, the SWOT analysis method, or Strengths, Weaknesses, Opportunities, and Threats, “asks [an organization] to consider the interplay of core competencies with the key forces in the organization’s environment (66-67).” Coronado Historical Association board and staff shared the following Strengths, Weaknesses, Opportunities, and Threats they attribute to the organization in 2021 and 2022.

In a SWOT analysis, respondents are asked to share their individual perceptions of the organization. It should be noted that individual perceptions do not necessarily equate to reality, nor are they exhaustive; however, they do form a picture of the organization and offer an opportunity for the Coronado Historical Association to think about how to proactively address these common attributes as it proceeds in its work. Through its Community Survey and community conversations, the Executive Director of CHA compiled the following perceptions for discussion:

**STRENGTHS**

- CHA follows best practices for historical associations.
- The community respects the professional staff.
- The location of CHA’s building occupies a visible, central location.
- CHA benefits from an engaged board.
- CHA counts many dedicated volunteers.
- The focus on community education fulfills a community need.
- CHA cares for a reputable collection.

- CHA benefits from respect and support from the local community.
- CHA receives city funding that helps subsidize operations costs.

**WEAKNESSES**

- CHA experiences financial stresses from month to month.
- CHA does not conduct enough community outreach for its programs.
- The organization’s facility is relatively small and CHA does not allocate enough resources for its care.
- The organization is habitually understaffed.
- CHA has difficulty engaging the broader community in its work.
- The board and membership suffers from a lack of diversity including a lack of younger board members and members from different racial backgrounds.
- CHA does not advocate enough for historic preservation.
- The organization does not have adequate communications procedures and approvals which often leads to hasty and weaker communication.

**OPPORTUNITIES**

- CHA has the ability to tap into corporate donors and high-net-worth individuals.
- The presence of the Navy in Coronado is an unrivaled opportunity for programmatic and funding partnerships.

• CHA is well positioned to collaborate with outside organizations, including local, regional, and national museums.
• CHA has the opportunity to update its facilities specific to its museum needs.
• CHA has the capacity to increase organizational membership.
• CHA can educate donors of financial needs.

THREATS
• CHA is at risk of not being able to keep up with required maintenance.
• CHA experiences a competitive funding environment which overlaps with other nonprofit organizations in Coronado.
• CHA has unpredictable political support from the City.
• The organization suffers from a lack of long-term financial security and a lack of an ability to sustain its programs long-term.
• CHA suffers from unsteady, and, at times, unpredictable public perceptions of the organization.

DISCUSSION OF THE SWOT ANALYSIS
Having undertaken the SWOT analysis, CHA noted areas in which the organization could improve its approach, expand, contract, reorganize, or reiterate its activities.

With this information in mind from both intimate board and staff stakeholders and broader community input, CHA took a more informed, fresh look at its mission, values, and vision statements to chart the next direction of the Coronado Historical Association.

Between the identification of the organization's strengths, weaknesses, opportunities, and threats and the creation of this strategic plan, the following weaknesses from the SWOT analysis were addressed by CHA's leadership through the following action items:

Weakness 1: CHA does not conduct enough community outreach for its programs.

Action Item: CHA resolved to increase and align its marketing, board member visibility at other non-CHA events and increase visibility at community events by asking for specific representation in those events.

Weakness 2: The organization is habitually understaffed.

Action Item: CHA resolved to create mechanisms to fund staffing, advertise for volunteers with specific skills sets needed by staff, and to stick to strategic plan initiatives.

Weakness 3: CHA has difficulty engaging the broader community in its work.

Action Item: CHA resolved to create a “heritage committee” to formalize its approach to advocacy, and create an outreach plan with its membership committee.

Weakness 4: The board and membership suffers from a lack of diversity including a lack of younger board members and members from different racial backgrounds.

Action Item: CHA resolved to reach out to and recruit younger and more diverse committee members that can become board members and advocates within the community.

Through the planning process, CHA maintained the need to finish the strategic plan, and also understood the exigencies of running an organization in the midst of completing its strategic plan. The following plan outcomes, goals, tasks, and measurements take into account these efforts begun by CHA leadership, integrating these efforts into the overall plan.
MISSION, VALUES & VISION STATEMENTS

Developed by the board and staff of the organization in 2021, the following Mission, Values, and Vision statements were adopted by the Coronado Historical Association:

MISSION

CHA advances learning and stewardship in all by serving as Coronado’s primary center for community history.

VALUES

- We value local history and use it to enrich lives by creating connections to Coronado’s past.
- We value using history to create innovative and interactive learning experiences for all.
- We value the preservation of our community’s heritage and the excellent stewardship of resources, including collections, staff, facilities, and investments.
- We value the trust of our community and continually seek to earn it.

VISION

Coronado is increasingly vibrant, engaged, and resilient because of CHA’s stewardship of our storied past, present, and future.

These guiding principles allow the Coronado Historical Association to reflect upon how the organization proceeds in both stating, and now, achieving its mission. The Community Survey CHA conducted, detailed in the next section, clarifies how these principles build the case for building both a museum identity and towards future formal museum accreditation.

PICTURED: Before 1100 Orange Avenue was CHA’s headquarters, it was home to several other businesses and entities including the Bank of America’s Coronado Branch. Coronado Historical Association Collection. Catalog number 1900.11.01-194.
ACHIEVING THE MISSION

In the lead up to reviewing its mission, values, and vision statements, the Coronado Historical Association took the opportunity to conduct a Community Survey which engaged approximately 2,500 community members. The findings of the survey indicated that community members would like CHA to honor and bring to light local heritage; collect and exhibit historic artifacts and archives; teach history to children; and provide volunteer opportunities and programs to seniors.

The following word clouds note the perceptions both from the community and within the organization that reflected individual responses to the survey.

The top three responses from the survey indicated that the Coronado community values *advocacy for historic preservation* (68.5%), *collecting historical artifacts and archives* (66%), and *teaching history to local school students* (60.1%). These responses align with over 70% of survey respondents’ views indicating that it is *Very Important* for Coronado to have a museum, with nearly 76% of respondents having already engaged with CHA by *visiting the museum*.

While the survey instrument was created by CHA itself, which may have introduced bias into the survey tool, respondents overwhelmingly valued the museum experience as a quintessential component of the Coronado Historical Association experience. With the majority of respondents already having visited the museum and also affirming the importance of having a museum in Coronado, the survey indicates that the community is not only ready for a museum, it already thinks CHA is a museum.

Formalizing CHA as a museum requires an assessment of organizational priorities, including its specific programs and initiatives, that in turn reiterate CHA’s stated role as a museum institution in the community. While both the American Alliance of Museums and the American Association of State and Local History have accreditation requirements that align with industry standards, a more nuanced look at the “business” of museums can help CHA more strategically situate the nonprofit as it works to fulfill community expectations with its stated mission.

BUSINESS MODEL

As stated in the newly completed Mission Statement, CHA “advances learning and stewardship in all by serving as Coronado’s primary center for community history.” The business model operationalizes the mission by identifying the museum as the chief vehicle through which the organization administers its activities and engages its audience. To best approximate the following business model, CHA’s mission has been incorporated for continuity and renewed purpose as a museum institution:
Coronado Historical Association advances learning and stewardship in all by serving as Coronado’s primary center for community history by: honoring and bringing to light local heritage and collecting and exhibiting historic artifacts and archives. A community museum, the organization implements and sustains these activities primarily through its membership program, public and private grants, individual giving, and earned income.

The above business model highlights the top two priorities the Community Survey respondents stated as priorities for the Coronado Historical Association, and firmly situates CHA as a museum institution for future accreditation. Additionally, the business model further affirms existing positive associations and expectations associated with CHA as a museum institution.

CHA separated from the Visitor Center in 2018. It should be noted that the Visitor Center was a long-time business component of CHA and the separation from the Visitor Center impacted the organizational business model by refocusing the organization to reinvesting in the visitor experience. This visitor experience, now deepening to one of a “museum visitor experience” departs from the Visitor Center model which depended on additional outside uses of funds including professional advertising and promotion, posing a distraction for CHA’s core institutional identity. Additionally, while the transition away from the Visitor Center at first reduced income, the move away from this organizational commitment resulted in more individual contributions to sustain the CHA mission.

PICTURED: Associates of the Central Drug Store at 1106 Orange Avenue smile in front of their wares. Coronado Historical Association Collection. Catalog number 1900.11.01-133.
After establishing a new mission, values, vision, and associated business model, and the following Strategic Outcomes, CHA now has a launching pad from which to implement its long-term goals. To help steer CHA’s future direction, the following Strategic Outcomes help orient the museum towards success at the end of the intended term of this document, 2023-2026, or three years:

**OUTCOME 1: A TRUSTED INSTITUTION**

CHA will clarify its identity as a museum and its strategic position in the non-profit, preservation, and history ecosystem in Coronado and in the broader San Diego region.

**OUTCOME 2: A BUILDING THAT LEADS TO MUSEUM ACCREDITATION**

CHA will devise a vision for its building that incorporates its role as a museum with a deliberate, holistic museum experience satisfying museum accreditation standards.

**OUTCOME 3: A CAPACITY TO ELEVATE HISTORY**

CHA will build a pipeline for future board members and increase staff capacity to an FTE of five. The strategic outcomes serve as guideposts for the day-to-day activities of the organization. Below, each strategic outcome is detailed by the following goals as well as specific tasks and measurements for achieving each goal. This structure intends to create accountability for CHA board and staff in attaining the three- to five- year strategic outcomes above.
With the agreed upon Outcomes for the Coronado Historical Association over the next three years, indicated in the “Goal Setting” portion of each detailed Strategic Outcome, the following goals, with accompanying tasks and measurements have been ascribed to each Outcome. Each of these Outcomes are interdependent and happening simultaneously, thereby mutually reinforcing each other in CHA’s development over time.

OUTCOME 1: A TRUSTED INSTITUTION

CHA will clarify its identity as a museum and its strategic position in the non-profit, preservation, and history ecosystem in Coronado and in the broader San Diego region.

GOAL 1: Solidify CHA’s Position as Coronado’s History Expert and Steward; By 2026, develop and better delineate the relationship with the City and other local organizations preserving and interpreting the community history of Coronado.

GOAL 2: Position CHA as a Community Leader; Build and publicize strong private and public community partnerships from 2023-2026.

GOAL 3: Transition from “Member-led” to “Community-led”; By 2025, better define the locus of power within the organization as a center for “community history.”

GOAL 4: Build a Diverse Board; By 2026, build an inclusive board that reflects Coronado demographics.
## OUTCOME 1: A TRUSTED INSTITUTION

### GOAL (priority)

#### GOAL 1

**Solidify CHA’s Position as Coronado’s History Expert and Steward**

By 2026, develop and better delineate the relationship with the City and other local organizations preserving and interpreting the community history of Coronado.

#### TASKS & MEASUREMENTS

**Engage the Coronado community in discerning, recording, preserving, and collecting the history of Coronado.**

- Develop a monitoring group model that includes a CHA presence at City Council, Historic Resource Commission (HRC), and Design Review Commission (DRC) meetings to convey a relationship that is representative of CHA’s community mission, and is positive, collaborative, and informed.

- Provide top-quality community collecting and historic preservation programming.
  - Create a Coronado 101 program for new Coronadans.
  - Build a volunteer speaker bureau and roster of presentations delivered to service clubs in Coronado and in the greater San Diego area.
  - Continue to develop collections and preservation workshops and forums.

**Champion the CHA history program and differentiate it from that of other organizations.**

- Develop partnerships and differentiate the CHA history program from that of Coronado Public Library and the Hotel del Coronado, in particular the organizational collecting plans and programming.

- Further develop CHA’s relationship with City by continuing to position CHA as the primary center for conducting professional archival research.
  - Work to establish a formalized relationship through MOUs detailing how City records may be used and accessed by the City and the general public.

- Spearhead partnerships and an Executive Director Roundtable with Coronado Mainstreet Ltd., Coronado Chamber of Commerce, and Discover Coronado.
  - Clarify the role of CHA as a history partner with Coronado Mainstreet Ltd., which no longer focuses on history programming in Coronado.
  - Clarify the role of CHA as an audience partner with the Coronado Chamber of Commerce and Discover Coronado, including finalizing the transition of CHA from the Visitor Center to Coronado’s Museum.

#### RESPONSIBLE

**LEAD**

Executive Director, Curator of Collections

**PARTNERS**

Board of Directors, Advisory Committees
## OUTCOME 1: A TRUSTED INSTITUTION

<table>
<thead>
<tr>
<th>GOAL (# priority)</th>
<th>TASKS &amp; MEASUREMENTS</th>
<th>RESPONSIBLE</th>
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</thead>
<tbody>
<tr>
<td>GOAL 2</td>
<td>Elevate the formal role of the Executive Director as CHA’s primary spokesperson and community leader.</td>
<td>LEAD Executive Director,</td>
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<tr>
<td>Position CHA as a Community Leader</td>
<td>Foster a relationship with the U.S. Navy</td>
<td>PARTNERS Board of Directors</td>
</tr>
<tr>
<td>Build and publicize strong private and public community partnerships from 2023-2026.</td>
<td>• Develop a relationship with commands and offer programming to Navy audiences.</td>
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<td></td>
<td>• Serve as a resource for U.S. Navy and military history in Coronado.</td>
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<td>• Add an active duty/military spouse board position.</td>
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<td></td>
<td>Enhance relationships with Coronado nonprofits and service groups.</td>
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<td></td>
<td>• Offer continual invitations, tours, and lectures to area organizations.</td>
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<td>• Cross-promote organizational events and programs.</td>
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<td></td>
<td>• Continue to develop formal programmatic partnerships.</td>
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<td></td>
<td>Define the relationship with the City of Coronado that allows for historic preservation advocacy and programmatic partnerships to coexist:</td>
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<td></td>
<td>• Plan and host annual meet and greets with the city council and staff, increasing opportunities for CHA and the City to foster partnerships.</td>
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<td></td>
<td>• Continue to develop a good relationship with city staff and council; contribute information, data, and research to city staff on historical projects.</td>
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<td>• Formalize the role of the City Council representative to CHA by creating a job description for the representative, that includes a report provided to the representative for City Council.</td>
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<td>Lead and create a historic preservation initiative that uplifts the preservation of the physical CHA building and continues the legacy of CHA as a historic preservation advocacy organization.</td>
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<td>Champion a city-wide conversation and movement around Coronado preservation.</td>
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<td>• Develop year-round preservation programs and partnerships</td>
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<td>• Continue to expand Preservation Month (GEM Award, Historic Home Tour) and use it as a model for quarterly preservation special events.</td>
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<td></td>
<td>• Develop and expand community historic preservation monitoring</td>
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<td></td>
<td>• Host preservation workshops and practicums.</td>
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<td>• Create a Preservation Speaker Bureau.</td>
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<td>CHA will host a Year of Coronado Historic Preservation as a year-long program calendar.</td>
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OUTCOME 1: A TRUSTED INSTITUTION

<table>
<thead>
<tr>
<th>GOAL (priority)</th>
<th>TASKS &amp; MEASUREMENTS</th>
<th>RESPONSIBLE</th>
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<tbody>
<tr>
<td><strong>GOAL 3</strong></td>
<td><strong>Tasks &amp; Measurements</strong></td>
<td><strong>Lead</strong></td>
</tr>
<tr>
<td>Transition from “Member-led” to “Community-led”</td>
<td>Grow support for CHA to 10% of Coronado’s population.</td>
<td>Executive Director, Board President</td>
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<td>Redesign CHA’s membership program.</td>
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<td>• Welcome additional members of the community, including renters, new homeowners, second-home homeowners, and national and international tourists.</td>
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<td></td>
<td>• Partner with Coronado’s real estate to educate new homeowners and renters to know that being a civic-minded resident means you are a member of CHA.</td>
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<tr>
<td></td>
<td>• Develop an inclusive membership model that means being a resident means you are a member of CHA.</td>
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<td>• Deliver the message that CHA is for everyone by sending membership cards yearly to every address in the Village, Cays, Strand Housing, and North Island.</td>
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<td>Focus on local engagement through an annual community survey incorporated into CHA’s annual report measuring satisfaction of CHA programs and initiatives.</td>
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<td>Create a quarterly journal publication with history articles and behind-the-scenes information as a member benefit.</td>
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<td>Redesign and rebrand membership materials to align with CHA’s community-led membership model.</td>
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<td>Reposition and transition institutional committees of the board as community advisory groups to supplement CHA staff and board programs and initiatives.</td>
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<td><strong>Partners</strong></td>
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<td></td>
<td>Museum Membership Consultant</td>
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</table>
OUTCOME 1: A TRUSTED INSTITUTION

GOAL. (# priority) TASKS & MEASUREMENTS RESPONSIBLE

GOAL 4

Build a Diverse Board

By 2026, build an inclusive board that reflects Coronado demographics.

Commit to the industry standard of at least 20% of the board being from diverse backgrounds by 2024, including diversity of residents (including renters), racial, professional, and age diversity.

- Implement strategies and initiatives to attain desired diversity outcomes in line with AAM’s Museum Accreditation Program.
  - Create mechanisms to understand Coronado’s demographics
  - Develop a board matrix that reflects these demographics, geographically and in terms of diversity
  - Consider establishing student, Navy / Navy spouse board positions, and investigate other specific board positions.

- Reflect on 2nd homeowners and create a policy for community engagement of these individuals, including potential board membership, committee membership, and volunteers.

Increase board / community engagement.

- Create informal advisory committees for initiatives, exhibits, and programs.
- Establish an advisory panel of former board members.
- Formalize the “committee to board service” pipeline.

Expand Board Member Training.

- Develop more robust board training which includes information such as a glossary of terms, information about key people and roles, current issues in the museum field, etc.
- Enhance training on CHA’s organizational history and mission
- Use new board member training to clearly delineate respective staff and board roles and responsibilities, including relative processes and policies, and appropriate ethics and expectations.

Formalize the path to Board Leadership.

LEAD
Executive Director, Board President

PARTNERS
Governance Committee
CHА will devise a vision for its building that incorporates its role as a museum with a deliberate, holistic museum experience satisfying museum accreditation standards.

**GOAL 1:** Produce a Facilities Plan; By 2024, produce a facilities plan, incorporating needs of the museum experience, longer-term building maintenance, and a ten-year Pro-forma budget as they align with state, federal, and other tax credit incentives.

**GOAL 2:** Formalize a Curatorial Vision & Create an Interpretive Plan; By 2025, create a curatorial vision for the CHА building to identify the physical space needs for museum-quality exhibitions and programs.

**GOAL 3:** Communicate CHА's Identity through the Building; By 2026, adopt a brand strategy to center CHА's work around the 1100 Orange Museum Building.

PICTURED: Looking south of the Hotel del Coronado down the Silver Strand, this photograph features Coronado’s first museum, the Natural History Museum, in the lower left hand corner. The museum was built in 1888 but was demolished by 1900. 1898. Coronado Historical Association Collection. Catalog number 1900.78.02-18.
# OUTCOME 2: A BUILDING THAT LEADS TO MUSEUM ACCREDITATION

## GOAL 1

**Produce a Facilities Plan**

By 2024, produce a facilities plan, incorporating needs of the museum experience, longer-term building maintenance, and a ten-year Pro-forma budget as they align with state, federal, and other tax credit incentives.

### TASKS & MEASUREMENTS

- Hire a museum facilities specialist contractor to create a Facilities Plan that incorporates building maintenance, including a listing of capital and operation costs specific to the building.
  - Indicate future capital improvements and their maintenance requirements as a section of the facilities plan.
  - Create a maintenance plan, Pro-forma budget, and capital projects timeline as subsections to the facilities plan that includes CHA’s ADA, Mills Act, Section 106 compliance, Museum Galleries, Museum Store, Research Center, Collections Storage, Museum Cafe, and Education Spaces such as the Lecture Hall, among other items.
  - Develop a staff position with a job description for a building engineer (see below).

- Develop a new lease for the museum cafe that is in line with the facilities plan, in anticipation of the sunset of Tent City’s lease.
  - Museum Cafe lease should include at a minimum, a base rent that underwrites the cost of CHA’s mortgage, language that supports a strong partnership that positions the space as CHA’s Museum Cafe and promotes CHA’s mission and programs with usage that is conducive to the historic nature of the building and cafe space, in alignment with AASLH STEPS (e.g. there is and will be no vented hood in the kitchen, no gas hookups).
  - Investigate developing a concessionaire agreement involving an RFP process.
  - Develop a plan to update the Cafe’s infrastructure. (*CHA capital investment v. tenant improvements rental rebate*)

- Ensure incorporation of signage strategy into broader Facilities Plan, as defined in Outcome 2, Goal 3 CHA brand identity.

- In the staffing plan for the organization, incorporate a building engineer on payroll within the next 3 years who completes building handiwork, bids out work contracts as necessary, and reviews all subcontractor specifications and quality of facilities work.

### RESPONSIBLE

**LEAD**

Executive Director

**PARTNERS**

Advisory Committees
# Outcome 2: A Building That Leads to Museum Accreditation

## Goal (Priority)

### Goal 2

**Formalize a Curatorial Vision & Create an Interpretive Plan**

By 2025, create a curatorial vision for the CHA building to identify the physical space needs for museum-quality exhibitions and programs.

---

### Tasks & Measurements

As part of the facilities plan (Outcome 2, Goal 1), execute a building survey to determine the square footage of the existing exhibit and curatorial space within the CHA building and the potential square footage for CHA’s curatorial vision.

- Detail specifications of the building and exhibition furniture and equipment (such as A/V) to complete the picture of curatorial possibility and operational and engagement responsibilities.

**Produce an interpretive plan which integrates curatorial vision with the overall museum experience, including museum signage, donor wall, and relative museum roles and responsibilities to implement the interpretive plan.**

- Conduct an analysis (e.g. SWOT) of exhibitions to date, including the review of budget line items that can align with CHA’s curatorial vision.
- Create an exhibition plan for the next 3-5 years that lives within the interpretive plan.

**Create a community-based curatorial advisory model.**

- Engage reciprocal community partners to better understand the gaps in current exhibitions and programs regarding Coronado’s history and historic preservation.
- Identify and target the audiences for each CHA exhibit.
  - Create community advisory groups to enhance curatorial expertise for each exhibition.

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### Responsible

**Lead**

Executive Director, Curator of Collections

**Partners**

Advisory Committees, community members
## OUTCOME 2: A BUILDING THAT LEADS TO MUSEUM ACCREDITATION

<table>
<thead>
<tr>
<th>GOAL (priority)</th>
<th>TASKS &amp; MEASUREMENTS</th>
<th>RESPONSIBLE</th>
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</table>
| GOAL 3          | Update the CHA website, logo, membership program (See Outcome 1, Goal 4), and institutional signage to reflect a cohesive, approachable, and recognizable organizational identity to support CHA’s mission. | LEAD  
Executive Director |
|                 | • Work with museum consultants to refine CHA’s brand including its logo and brand colors.  
• Adopt a style guide. | PARTNERS  
Advisory Committees |
|                 | By 2026, ensure all brand identifiers are up to date across the organization’s external and internal affairs, from “signage to stationary.” | |
|                 | As part of the facilities plan (Outcome 2, Goal 1), develop a comprehensive CHA Building Signage Plan that creates signing standards including, placement, size, duration, location, maintenance, and removal. | |
|                 | • Create a timeline for the implementation of: | |
|                 |   • CHA’s “Partial Disabled Access Compliance Report”  recommendations for ADA Signage.  
   • External signage and lighting plan.  
   • Interpretive signage plan.  
   • Donor acknowledgment plan. | |
OUTCOME 3: A CAPACITY TO ELEVATE HISTORY

CHA will build a pipeline for future board members and increase staff capacity to an FTE of five.

GOAL 1: Determine Key Programs & Initiatives in aligning the organization for museum accreditation; By 2026, develop a strategy to prioritize the different programs and initiatives of the museum experience.

GOAL 2: Create a Staffing Plan; By 2024, create a five-year staffing plan that assists in accomplishing the goals of the Strategic Plan.

GOAL 3: Implement a Funding Strategy; By 2025, create a five-year business plan and development plan that supports the activities in the Strategic Plan and mirrors the ten-year pro-forma for the museum building.

OUTCOME 3: A CAPACITY TO ELEVATE HISTORY GOAL SETTING

<table>
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<tr>
<th>GOAL (# priority)</th>
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<tr>
<td>GOAL 1</td>
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<tr>
<td>Determine Key Programs &amp; Initiatives in aligning the organization for museum accreditation</td>
<td>In accordance with CHA’s Curatorial Vision and Accreditation Goals, develop a 3-5 year exhibition and program schedule around CHA’s mission pillars of Preservation, Education, and Community. Align how the Museum Store, Membership Program, and Key Special Events support CHA’s mission and Exhibition/Program schedule. Align StEPS and AAM accreditation requirements and suggestions to improve the process of accreditation. Adopt the following documents: • Adopt a Disaster Preparedness Plan for CHA. • Adopt a CHA Code of Ethics, taking into consideration the roles of the board and staff and their respective responsibilities in interfacing with the organization. • Update the collections management policy by creating a strategic collections plan that assesses current strengths and needs for the collection, emphasizing common museum field practices, with an emphasis on selective deaccessioning to improve the quality and caliber of CHA’s collection. Build a community communication strategy around accreditation and the benefits of this accreditation. Determine Key Performance Indicators (KPIs) for success in aligning the organization for museum accreditation.</td>
<td>LEAD Executive Director PARTNERS Curator of Collections, Advisory Committees</td>
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### OUTCOME 3: A CAPACITY TO ELEVATE HISTORY GOAL SETTING

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<td>GOAL 2</td>
<td>Create a Staffing Plan</td>
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<td>By 2024, create a five- year staffing plan that assists in accomplishing the goals of the Strategic Plan.</td>
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<td>Create a staffing plan to encompass the next five years of growth at CHA, including job descriptions in the staffing plan to be shared with the board for their information.</td>
<td>LEAD</td>
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<td>• Incorporate a third full-time individual into CHA, to act as an external Community Engagement-focussed liaison for the organization, whose focus is programs, events, and volunteers.</td>
<td>Executive Director</td>
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<td>• Create a policy for internships, including cost/value analysis systems and how internships are defined as well as compensated.</td>
<td>PARTNERS</td>
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<td>Ensure the staffing plan meets common museum field standards, including the incorporation of an equity plan, and generous but financially responsible classifications of full- and part-time staff.</td>
<td>Board President</td>
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<td>• Ensure salaries are reviewed regularly, fitting in line with job descriptions and responsibilities, including an equitable pay differential in line with museum sector standards, including posted salaries.</td>
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<td>• Define potential career trajectories of museum positions in line with organizational needs.</td>
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<td>• Institute evaluation as a component of staffing plan implementation for continued updating and appropriateness of CHA's staffing standards.</td>
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<td>• Create a performance review process. Prioritize creating a work plan for each CHA employee in completing the duties outlined in each job description.</td>
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### OUTCOME 3: A CAPACITY TO ELEVATE HISTORY GOAL SETTING

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<td>GOAL 3</td>
<td><strong>Implement a Funding Strategy</strong>&lt;br&gt;By 2025, create a five-year business plan and development plan that supports the activities in the Strategic Plan and mirrors the ten-year pro forma for the museum building.</td>
<td><strong>LEAD</strong>&lt;br&gt;Executive Director&lt;br&gt;<strong>PARTNERS</strong>&lt;br&gt;Board of Directors, Investment Committee</td>
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Establish an earned revenue strategy that designates goals for less restricted income in order to fund operational expenses.<br>
- Establish goals for the percentage mix and revenue targets for different types of earned revenue.<br>
- Match each source of revenue to the use of revenue across the organization. Integrate "sources and uses" analysis in all organizational bookkeeping, aligning with annual taxes and organizational audits.<br>
- Determine the future of the museum store and how this component of the museum experience is reflected in the organizational business plan.<br>

In the development plan, determine the future structure of the membership program to assist CHA in meeting its giving targets and create new opportunities for contributed revenue.<br>

With the board's Investment Committee, develop a plan to begin an endowment, including the capacity for donor-advised funds to help grow the endowment.<br>
- Review and renew Institutional Investment Policy, and incorporate the policy into the development plan, indicating benchmark decisions.<br>
- Align previous planned giving efforts with the creation of an endowment and incorporate planned giving (estates) and tax credit incentives in endowment planning.<br>
- Prioritize endowing CHA’s Executive Director Role before creating a building endowment.
CHA is a well-respected organization that plans, implements, and leads as a steward of its local history, culture, and future. Ultimately, the strategic planning process allows organizations to move from the state exigencies of the moment to think more broadly about the possibility of future initiatives and the aspirational qualities of CHA grounded in the vision of community members to save historic Coronado.

With the dissolution of the Visitor Center, the transfer of title of its headquarters building, and a pandemic all in the rearview mirror, CHA is poised to think proactively as it approaches the next chapter in its organizational history.

As the organization shifts from a primary “history association” identity to one of an “association and museum,” CHA has an even larger opportunity to reflect on the questions of how it begins the task of institution-building in Coronado. How does CHA differentiate itself from other nonprofits and the City of Coronado itself? How does this impact the telling of Coronado’s history and the understanding of CHA’s advocacy role for historic preservation in Coronado today? What impact does CHA’s new institutional museum identity have in answering these questions? This strategic plan is the next step.

With the adoption of this plan, the staff and board of CHA will be poised to both answer the questions above, in addition to answering new questions that probe the possibilities of interpreting history in Coronado, all enhanced by sound management and dedicated service from board members and volunteers. Resilient Heritage believes CHA is able to accomplish the goals within this strategic plan within the indicated timeframes. Witnessing the love and dedication for CHA and Coronado through the strategic planning process, the firm has no doubt the museum will be able to meet the moment. Moreover, with engagement of community stakeholders and familiar and new audiences, CHA will be better informed and positioned for the success it merits.
PICTURED: The VFW sponsored little league baseball team. C.1953. Coronado Historical Association Collection. Catalog number 2021.06.02.
APPENDICES A-F

APPENDIX A:
LIST OF STAFF & BOARD MEMBERS AS OF AUGUST 2022

EXECUTIVE COMMITTEE

Dave Landon
President

Robin Siara
Vice President

Jane Simeral
Treasurer

Claudia Gallant
Secretary & Strategic Planning Chair

DIRECTORS

John Duncan

Beth Flemming

RG Head

Meredith Heinecke

Christine Keyes

Jonathan Massie

Jenna McIntosh

LuAnn Miller

Caroline Murray

Margarita Rhodes

Kelly Ronimus

Emily Talbert

Clyde Van Arsdall

STAFF

Christine Stokes
Executive Director

Vickie Stone
Curator of Collections

Shannon Clancy
Member Stewardship Associate

Erin Pfiel
Museum Associate

Yvonne Middleton
Museum Associate

Denisse Cuervo
Museum Associate
APPENDIX B:
LIST OF INTERVIEWEES

Katy Bell Hendrickson
Jane Braun
Don Budinger
Beth Fleming
Claudia Gallant
Edry Goot
RG Head
Marvin Heinze
Jim and Jamie Jamison
Susan Keith
Christine Keyes
Dave Landon
Jonathan Massie
Jenna McIntosh
LuAnn Miller

Tom Mitchell
Caroline Murray
Margarita Rhodes
Kelly Ronimus
Kevin Rugee
Kelly Sarber
Robin Siara
Jane Simeral
Emily Talbert
Jami Teagle-Burgos
Clyde Van Arsdall
Sara Wells
Art Wilcox
Kitt Williams
Margaret Zoehrer
APPENDIX C:  
KEY DATES

AUGUST 2017  
CHA Board of Directors signed the American Alliance of Museum’s Pledge of Excellence

2018  
CHA joined the American Association of State and Local History’s Standards and Excellence Program for History Organizations (StEPs), a roadmap for improvement

2018  
Aligned Board of Directors Committees to StEPs

2019  
Completed a comprehensive Community & Member Survey

2019 - 2021  
CHA Board of Directors and Staff hold multiple Strategic Planning workshops

2019 - 2021  
Developed CHA Elevator Pitch, Mission, Vision, Core Values

2021  
Hired J. Walcher Communications, a professional messaging firm, to align strategic messaging

JULY - MARCH 2023  
CHA hired Resilient Heritage to coalesce organizational strategic planning efforts into this Strategic Plan

MARCH 2023  
Completion of Strategic Plan

MAY 2023  
Alignment of Advisory Committees

JULY 2023  
Public Release of Strategic Plan
APPENDIX D: MATERIALS & DOCUMENTS REVIEWED

GENERAL RESOURCES

• Coronado Historical Association Website, CoronadoHistory.org
• Coronado Historical Association, Celebrating Our First 50 Years pamphlet, 2019

CONSULTANT REPORTS

• J. Walcher Communications, Celebrating the Value of History, 2020
• J. Walcher Communications, Interviews & Analysis, 2020
• The Fitz Team and the Compass Group, The Planning Study Report, 2017

FINANCE & FUNDRAISING DOCUMENTS

• CHA, Financial Strategy Report, New Board Member Check-In, 2020
• CHA, 2021-2022 Financials PowerPoint for Budget Workshop, 2021
• CHA, The Heritage Initiative, campaign pamphlet, 2019
• CHA, 1100 Orange Avenue: Coronado Historical Association’s Forever Home, 2019
• CHA, Coronado Historical Association (CHA) receives major gift from local philanthropists, building release, 2021
• CHA, Campaign Plan, 2018
• CHA, Case for Support, 2018

GRANTS

• CHA, Museum Grant to City of Coronado, 2022
• CHA, Final Draft Collections Grant to City of Coronado, 2021
• CHA, Final Draft Exhibit Grant to City of Coronado, 2021
• CHA, Final Draft Historian Grant to City of Coronado, 2021
• CHA, Final Draft Preservation Grant to City of Coronado, 2021

NOTES & AGENDAS

• CHA, Board Retreat Agenda, Wednesday, February 23, 2022
• CHA, Coronado Historical Association Strategic Planning Talking Points, January 3, 2020
• CHA, Team Planning SWOT Analysis Worksheet, 2018

PRESENTATIONS

• CHA, Annual Member Meeting Presentation, 2020
• CHA, Community Survey Results Presentation, 2020
• CHA, New Board Member Presentation, 2020

RAW DATA

• CHA, CHA Mission, Vision, and Values Raw Outcomes, 2020
• CHA, Coronado Results Spreadsheet - Inclusive History, 2020

REPORTS

• CHA, Year End City Grant Report 2019-2020, 2020
• CHA, Year End City Grant Report 2020-2021, 2021
• CHA, Board Meeting Financials Report, 2021
### APPENDIX E: PHASES A-D, OUTCOMES 1-3 STRATEGIC PLANNING ONE-PAGER

<table>
<thead>
<tr>
<th>PHASE A</th>
<th>PHASE B</th>
<th>PHASE C</th>
<th>PHASE D</th>
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<tbody>
<tr>
<td>By July 2023</td>
<td>By July 2024</td>
<td>By July 2025</td>
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#### OUTCOME 1: BUILDING TRUST IN CORONADO

Build and publicize strong private and public community partnerships from 2023-2026.

- By 2024, build an inclusive board that reflects Coronado demographics.
- By 2025, better define the locus of power within the organization as a center for "community history."
- By 2026, develop and better delineate the relationship with the City and other local organizations preserving and interpreting the community history of Coronado.

#### OUTCOME 2: A BUILDING THAT LEADS TO MUSEUM ACCREDITATION

- By 2024, produce a facilities plan, incorporating needs of the museum experience, longer-term building maintenance, and a ten-year Pro-forma budget as they align with state, federal, and other tax credit incentives.
- By 2025, create a curatorial vision for the CHA building to identify the physical space needs for museum-quality exhibitions and programs.
- By 2026, adopt a brand strategy to center CHA's work around the 1100 Orange Museum Building.

#### OUTCOME 3: A CAPACITY TO ACTIVE HISTORY

- By 2023, create a five-year staffing plan that assists in accomplishing the goals of the Strategic Plan.
- By 2024, create a five-year staffing plan that assists in accomplishing the goals of the Strategic Plan.
- By 2025, create a five-year business plan and development plan that supports the activities in the Strategic Plan and mirrors the ten-year pro-forma for the museum building.
- By 2026, develop a strategy to prioritize the different programs and initiatives of the museum experience.
PICTURED: The Coronado ferry steams by as the photographer views San Diego from the foot of Orange Avenue. c. 1890. Coronado Historical Association Collection. Catalog number 1900.37.01-147.