



ADDENDUM 1

Ohio Village Master Plan

Issued: April 27, 2022

1.1 GENERAL INSTRUCTIONS

- A. This Addendum modifies the Request for Qualifications and may change previously issued Addenda, if any.

1.2 QUESTIONS

- Question: What is the relationship of fees, qualifications, experience, etc. in the evaluation of proposals?
 - Answer: Successful proposals will demonstrate technical competence to complete the scopes of work described in the RFQ. Consultant teams will be scored and ranked with the top three teams being interviewed by the selection committee. Cost proposals will be negotiated following the selection of the most-qualified consultant team.

- Question: Will there be interviews with a short-list of proposers?
 - Answer: Yes, the three firms with the best scores will be invited for interviews, which will take place in Columbus, or via Zoom.

1.3 ATTACHMENTS

- A. Ohio History Connection Strategic Plan 2020-2023, October 2020
B. Ohio Village Feasibility Study Executive Summary, June 2006
C. Ohio Village Building Breakdown, November 1, 1995
D. OFCC Form F110-330 Statement of Qualifications

1.4 SCHEDULE

- A. The deadline for proposals is extended to May 12, 2022 at 4:00 pm.
B. The deadline for final completion of the plan is extended to October 7, 2022.

End of Addendum No. 1

OHIO HISTORY CONNECTION

STRATEGIC PLAN 2020-2023

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LETTER FROM MOUNTAIN TOP VISION

It is my pleasure to introduce the Ohio History Connection Strategic Plan 2020-2023!

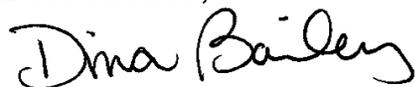
Mountain Top Vision, led by Dina Bailey, was hired by the Ohio History Connection to facilitate the visioning and development of the organization's strategic plan. The consulting firm is recognized for generating systemic change within organizations so that they can more positively impact their communities and, so, impact the world.

The strategic planning process included: an audit of relevant financial, development, interpretation, and collections documents; audience insights from external feedback opportunities; joint discussions between the Board and the Ohio Forum staff relevant to organization and field-wide strategic issues; weekly Ohio Forum meetings and/or working sessions; departmental and Board feedback check-ins; and, priority/resource alignment.

The resulting strategic plan is informed, relevant, and multi-year. It is a cascading plan where the intention is to provide a detailed roadmap for the first year, and a clear direction for the remaining years, while recognizing a need for flexibility and adaptability the farther out the organization moves from the date of the strategic plan's original approval by the Board. Furthermore, the Ohio Forum spent a significant amount of time at the outset ensuring that there was both a shared understanding of and support for clear alignment with the Ohio History Connection's mission, vision, and values.

Special thanks to the entire staff and Board, especially members of the Ohio Forum, for their commitment, constructive participation, and valuable input throughout the process!

Best wishes,

A handwritten signature in black ink that reads "Dina Bailey". The signature is written in a cursive, flowing style.

October 2020

BEGINNING WITH PREPARATION

The Ohio History Connection, formerly the Ohio Historical Society, is a statewide history organization that was chartered in 1885. As a 501(c)3 nonprofit organization, the Ohio History Connection is responsible for carrying out history services for Ohio and its citizens.

As society confronts a range of issues, movements, and moments in 2020, there remains an opportunity for the Ohio History Connection to provide relevance by embracing the complexities of today and making connections between the past, present, and future. Across the nation, and within Ohio, people are searching for credible resources that connect aspects of history with current events. In order for the Ohio History Connection to be a trustworthy resource, the Board, senior leadership, and staff must be aligned.

It should be acknowledged that much of the strategic planning work followed other strategic discussions and decisions made in conjunction with the socio-economic impacts of the COVID pandemic and demonstrations that followed the murder of George Floyd.

This report serves as a bridge, recognizing the tumultuous impact that 2020 has had, and continues to have, on the United States and the world. In developing a strategic plan for the next three years, the Ohio History Connection recognizes the significant economic, political, and cultural developments currently underway and acknowledges that any plan created in this moment must naturally be simultaneously visionary and practical in nature.

The foundational statements, strategic priorities, objectives, and tactics reported here are outputs of a robust process that leaned on the expertise, passion, and dedication of Ohio History Connection staff as well as valuable input from Board feedback and the analysis of community data. The Ohio Forum has been essential in their commitment to numerous working sessions while also being ambassadors with their divisions/departments.

The Intentional Journey

Our Mission: Why We Exist

- **We spark discovery of Ohio's stories.** Embrace the present, share the past and transform the future.

Our Core Values: Who We Are

- **Relevance:** Addressing and communicating the significance of history with Ohio's diverse people
- **Inclusivity:** Appealing to all Ohioans, especially underserved audiences
- **Authenticity:** Valuing artifacts and true stories of history
- **Stewardship:** Protecting the evidence of Ohio history
- **Working Together:** Pursuing teamwork and sharing authority and responsibility

Our Mandate: What We Do

- Manage **more than 50 historic sites and museums** across Ohio
- Care for our **state's collections and archives** and share the stories of Ohio and Ohioans
- Administer the **state historic preservation office** that helps preserve historic places in Ohio
- Provide **education and outreach services** that support students, teachers, local history groups and communities in Ohio.

Impact Statement:

- We will better understand our relationship to history, the environment (built and natural), and each other; respond to the needs of our communities today and in the future; and, become catalysts for transformation and a more connected Ohio.

Strategic Priorities, Strategic Objectives, and Strategic Tactics

STRATEGIC PRIORITIES:

The strategic planning process yielded three broad organizational strategic priorities that support the Ohio History Connection's mission. The strategic priorities were then further nuanced through strategic objectives and tactics. And, major organizational projects are the cross-functional output of this process. These make up the roadmap for achieving overarching organizational impact. The plan was primarily developed by the Ohio Forum with opportunities for input across the staff and Board. Key to the roadmap of the strategic plan will be the division/department-level major projects that will further assign personnel, due dates, desired outcomes, and defined performance measures, which will allow the Ohio History Connection to monitor and evaluate the implementation and impact of the strategic plan over time.

Sustainability:

- All the ways that we support the ongoing impact of the organization, our sites, and the communities in which we work

Equity:

- All the ways that we undo structural inequities and ensure representation, access, and inclusion

Relationship-Building:

- All the ways that we strengthen our partnerships and connections with stakeholders across Ohio and beyond

Sustainability, equity, and relationship-building are guiding concepts for the Ohio History Connection in the years ahead and will inform each service it provides to Ohioans whether internally or externally-focused. These priorities meet the needs of this moment and will help us emerge from the current downturn positioned to achieve our desired impact and objectives.

Sustainability will enable us to maintain consistent service to Ohioans by moving toward a diversified funding model that will enable Ohio History Connection to weather economic downturns, and allow us to resource ambitious and important investments in infrastructure and visitor or customer experience.

Another aspect of sustainability is ensuring that those experiences, whether in-person at one of our sites or online, are befitting of what should be a top-three statewide history organization. Our reputation will help sustain us and will drive support. But a reputation needs to be earned through excellence. And, while we have achieved excellence in a number of areas, there are several key aspects of our work that still fall short and so are the focus of our objectives and major projects within this strategic plan.

Finally, sustainability means that we take seriously the threat to our state and organizational well-being posed by climate change. As a natural history organization, we hold evidence of this existential threat; and, so, we are addressing environmental sustainability within this plan.

Equity is a strategy for excellence. Telling the most robust and representational history of Ohio will ensure that our impact crosses demographic lines, and that our offerings support the learning, vision, and imagination of all Ohioans as well as our American Indian stakeholders and others living outside the state.

Ensuring that the people best positioned to interpret those histories and to work with Ohio's diverse communities are included in the organization is a proven means to ensuring relevance and excellence. Representation means, in part, that the staff, volunteers and trustees of the Ohio History Connection reflect the demographics of Ohio today and also reflect the histories we are charged with preserving and sharing.

And, equity also means recognizing and repairing harm done to communities because of their exclusion from, or misinterpretation in, the historical record. Widening the lens we hold up to history, to include a larger set of experiences, will allow more people to see reflections of their heritage, in the history of Ohio, and parallels to their lives today.

Relationship-building is the essential activity of our organization as it leads us to better outcomes than we could achieve on our own and ensures relevance by extending our reach and amplifying our impact. Ensuring that the partnerships and relationships we are currently invested in are working for all parties is important as we contend with reduced resources over the next few years.

Growing and strengthening relationships in three areas will ensure that a larger group of stakeholders are invested in our success and view us as essential. These are: partner organizations; municipal, county, and state-wide office-holders; and individual supporters (customers, donors, members, and influencers, among others).

STRATEGIC OBJECTIVES AND TACTICS:

These objectives and tactics will be adopted by all divisions in the organization and are the means by which we deliver impact in line with our three strategic priorities. They will be used to evaluate the activities and projects in all areas of the Ohio History Connection and to make decisions about what new work we take on. They were used to determine the major projects that follow this section.

SUSTAINABILITY:

1. Projects, activities, and initiatives will have a positive return on our investment. ROI will be measured in impact and/or income.
 - A. Assign resources to prioritize the needs of, and relationships with, external stakeholders.
 - B. Demonstrate impact in all 88 counties.
 - C. Create greater balance among our funding sources by increasing the percentage of resources derived from philanthropy and earned revenue.
 - D. Ensure that our activities are sustainable within our resources.
 - E. Develop culture of entrepreneurship and greater shared ownership of revenue generation across the organization.

2. Experiences (site-based, community-based, and virtual) will be memorable, meaningful, people-centered, and substantive. All departments design and implement a process to inventory and evaluate their constituent experiences (current and future) to ensure alignment with our strategic priorities and objectives (akin to the BHTLFOS process for K-12).
 - A. Connect our collections, content, and sites to species extinction and other environmental issues across the state.

B. Connect Ohio's history to national and global histories.

3. Projects, activities, and initiatives will use the fewest non-renewable resources possible.

Ohio History Connection will be carbon neutral by 2030.

A. All new building projects and renovations will be certifiable by LEED.

B. Invest in project management to reduce waste in project development and execution.

C. Develop a culture of sustainability: accept upfront investments in sustainable solutions that pay dividends over time; focus on needs and not conveniences.

EQUITY:

1. Include and uplift the most robust and representative aspects of Ohio's history, current communities, and environments (built and natural).

A. Ensure representation from diverse communities in all 88 counties and from our Tribal Nations partners across the U.S.

B. Ensure that Ohioans and members of our Tribal Nations partners can contribute and participate in our activities and initiatives, in-person and virtually.

C. Provide means for communities to represent their own histories and current lives.

2. Work continuously toward reparative history practices.

A. Implement the American Indian Policy across the organization.

B. Develop and implement strategies for including underrepresented histories in all our sites and programs.

C. Develop and implement strategies for increasing access to our sites, resources, and programs.

- D. Increase understanding of historic inequities and the ways they manifest today.
3. Attract and retain staff, trustees, volunteers, and contractors that reflect the histories we interpret and the demographics of the state.
- A. Build an inclusive workplace culture that retains employees with diverse identities.
 - B. Provide ongoing training for staff, trustees, and volunteers on the historical context for current inequities, and tactics for working in alignment with the values of equity, access, inclusion, and cultural competency.
 - C. Implement HR procedures that ensure a robust pool of diverse candidates for every posted position.
 - D. Ensure salary equity through ongoing analysis, adjustments, and through paid internships.

RELATIONSHIP-BUILDING:

1. All relationships with partners and other entities will expand or deepen the Ohio History Connection's desired impact.
- A. Evaluate impact of current and future partnerships and other organizational relationships.
 - B. Intentionally partner with individuals and organizations that share core values and vision with the Ohio History Connection.
 - C. Collaborate with underrepresented constituencies to build mutually beneficial initiatives and opportunities.
 - D. Ensure that all partnerships are mutually beneficial and not extractive. Long-term partnerships will be privileged over short-term ones.

2. Statewide impact requires intentional relationships across the state.
 - A. Identify strategic relationships we want to cultivate at federal, state, county, and municipality levels.
 - B. Develop relationships with municipal and county governments in all counties where we have sites and museums and outreach or preservation initiatives.

3. Build relationships that translate into greater resources and reach for the organization and our stakeholders.
 - A. Ensure that we are measuring impact using objective tools. Create pathways for listening to our audiences and customers and ensure we act on what we hear.
 - B. Ensure that we make clear connections at every appropriate opportunity to how people can support the financial health and/or the impact of our non-profit organization.

Major Organizational Projects and Major Division/ Departmental Projects

MAJOR ORGANIZATIONAL PROJECTS:

These projects represent the highest level-and most impactful projects that the organization will be taking on over the next ten years. This strategic plan is designed to be a three-year cascading plan that we will add to annually, extending it and providing more detail each new year. Division and Departmental Major Projects follow this section. All projects flow up to our strategic priorities and objectives.

3 YEARS (through FY2023):

1. Newly Developed Ohio Village experience will be completed in current structures

The anticipated changes to Ohio Village are threefold:

- A. Reintroduce past experiences that visitors tell us they miss such as artisans, crops, and animals.
- B. Redevelop all the characters and businesses to reflect the true diversity of Ohio's small towns in the 19th century; and, to appeal to fans of traditional food and craft practices.
- C. Extend the season from early spring through December.

We believe that the shortest path to greatest impact for visitors in Columbus is through the Ohio Village. We expect to create many up-charged and retail and concession opportunities and to amplify the Ohio Village's appeal as an event venue.

2. Collections Facility: construction will be completed

A new collections facility will be designed and constructed within three years with a budget of \$15MM (reflecting the currently available capital resources). At this budget, it will have neither the visitor experience aspects nor the room for future collections growth that were envisioned in the recent plan. However, we will create a facility that houses current collections at the highest standards for preservation and culturally appropriate storage. The location is TBD.

3. New Historic Sites and Museums structure/procedures will be in place

Ten years out from establishing the site partner management system, we will be speaking with all our site partners and other stakeholders to assess what is working and where changes to structure or procedures might increase impact, revenues, and/or create efficiencies.

4-8 YEARS (through FY2024-28):

1. Deferred maintenance, and any additional structures for, Ohio Village will be completed

The redevelopment plan for the Ohio Village may include one or more new buildings or structures. These will be completed within four to six years.

2. The National Afro-American Museum and Cultural Center will be rebranded as Ohio Museum of African American History and relocated within the History Center

We will undertake a feasibility planning process and if the conclusion is positive, we will then plan to relocate NAAMCC from Wilberforce to Columbus within eight years. The Museum will be rebranded to reflect its current and future work focused on African American histories and artists in Ohio.

NAAMCC has become a site of exceptional exhibitions and programs over the past six years under the leadership of Dr. Charles Wash, and yet visitation is a fraction of what it could be due to its location in the community of Wilberforce. By relocating the Museum to the History Center building, we will connect a strong program with a large community of student and family visitors.

3. World Heritage Inscription will be realized for Ft. Ancient, the Newark Earthworks (Great Circle, and Octagon), and the Hopewell Culture National Historical Park

We expect that World Heritage inscription will be realized within five years given the status of the eminent domain proceedings with MCC.

4. Collections Facility: the collections move will be completed

We anticipate a two-year process for relocating collections from their current situation to the new facility. The facility will be accessed by staff and volunteers, researchers, and American Indian partners for consultation. It may be open to visitors in a very limited capacity via guided tours.

5. American Alliance of Museums Reaccreditation will be completed for seven sites and initial Accreditation attained for three to five additional sites

The sites that currently have accreditation will be reaccredited in 2024. Additionally we hope to gain accreditation for three to five additional sites. We view this process as one tactic for raising and aligning the standard for practice across the sites.

6. Establish reburial cemetery at Johnston Farm

Archaeology is underway to identify a possible site for the establishment of a cemetery that would be made available to American Indian communities who wish to rebury the repatriated remains of their ancestors in Ohio. We will consult with our Tribal Nation partners to design the cemetery and determine the process for accessing it for reburials.

10 YEARS (through FY 2030):

1. Museum of Ohio (in the History Center) will be fully operational

The concept for Museum of Ohio that was developed a few years ago remains compelling as does the brand. Instead of working to create it downtown in a new facility, we are proposing a rebranding for the Ohio History Center and a redevelopment of all the exhibits. We aim to tell one, comprehensive, representational exhibit that covers the natural and human histories of Ohio from before the peopling of these lands to the present day.

2. Columbus Campus transformation will be completed

- A. Museum of Ohio
- B. Ohio Museum of African American History
- C. Ohio Village
- D. Community Green Space
- E. Library and State Archive
- F. State Historic Preservation Office
- G. Collections Facility

The vision for the Columbus campus is to create an un-missable experience where visitors can experience the Museum of Ohio, Ohio Museum of African American History, Ohio Village, and a park-like community green space--all with one ticket. Additionally, patrons of the library, archives and State Historic Preservation Office will have their needs met.

We see this robust and compelling set of experiences as a perfect platform for featuring the other sites and services we provide across the system by integrating them into the visitor experience. Opportunities for up-charged experiences, event rentals, retail that offers goods from across the site network, and concessions will contribute to our revenues.

3. Three sites currently closed to the public will open: Poindexter Village, Octagon Earthworks, and Benjamin Lundy House and Free Labor Store

Also within this timeframe we expect to open or be on the verge of opening two sites that center African American histories in Ohio, and a new visitor center for the Hopewell earthworks in Heath and Newark.

4. Complete consultation with American Indian tribes around repatriation and reburial.

Ohio History Connection will complete an important aspect of its work under NAGPRA by working with American Indian communities to consult on, culturally affiliate, and repatriate the remains of the 7,000+ culturally unaffiliated ancestral remains that are stored in our facility. Tribal partners will be offered the cemetery at Johnston Farm as one option for reburying these ancestors should they be interested.

5. Financial Sustainability Goals realized

- A. Earned revenue = 24% of operating revenues (up from 8%)
- B. Contributed revenue = 10-15% of operating revenues (up from 5%)
- C. \$3.5MM returned to Endowment from Operations

Increasing the percentage of revenues that are derived from earned sources and contributions three-fold over the next ten years is our stretch goal. We will locate a business development function within the Development department to ensure alignment in achieving this goal aimed at better securing the organization against future state revenue shortfalls.

Division/Departmental Major Projects:

These projects represent high-level references to division/departmental projects that the organization will be taking on. While the projects are listed here, there is a supplementary excel spreadsheet that provides additional details about personnel, due dates, etc. As with the Organizational Major Projects, these division/departmental projects also flow up to our strategic priorities and objectives.

National Afro-American Museum & Cultural Center (NAAM):

- A. Feasibility study for relocation of NAAM
- B. Relocate collections to Columbus
- C. Create exhibitions for launch of OMAAH
- D. Relocate to Columbus
- E. Ongoing work at Benjamin Lundy

- F. Ongoing work at Poindexter Village
- G. Creation of virtual exhibitions for Queens of the Heartland and Art of Soul
- H. Art of Soul
- I. Implementation of AIP

Outreach (OUT):

- A. Implementation of AIP
- B. Student and Teacher: Business plan and OHD product development
- C. Student and Teacher: New inclusive model curriculum
- D. Local History: Update AmeriCorps model
- E. Local History: Inventory and evaluate current programs, projects and relationships
- F. Support CR in site system evaluation
- G. Increase statewide impact through target outreach in Regions 1, 2 and 3
- H. Increase understanding that project and services offered are from OHC

Executive Director's Office (EDO):

- A. Providing leadership to America 250 for Ohio
- B. Legislation to better protect Ohio's human burial places (with HP)
- C. Pursuing additional state funding in support of Ohio history and OHC
- D. World Heritage inscription and reclaiming the Octagon lease (with CR)
- E. Reaccreditation for sites and new accreditations for 3-5 sites (with CR)
- F. Ohio Open Doors (with HP)

Ohio History Center/ Ohio Village (OHCOV):

- A. Reimagining and reinterpretation of Ohio Village
- B. Create and implement a sustainable volunteer program/curriculum for OHCOV

- C. Implement AIP (with AIR)
- D. Support move of NAAM to Columbus (with NAAM)
- E. Contribute to the creation of the Museum of Ohio Visitor Experience
- F. Increase retail sales by 25-30% across onsite and online stores
- G. Establish a process and expectations about external event usage versus OHC programming (with Director of Business Development)

State Historic Preservation Office (SHPO):

- A. Deployment of integrated project system database
- B. Development of 5-year statewide historic preservation plan
- C. Continue working with state to create a Historic County Courthouse Preservation Fund (with EDO)
- D. American Indian Policy integration
- E. Continue working to enact Unmarked Human Remains legislation (with EDO)
- F. Produce Ohio Open Doors in 2021 and 2022 (with EDO)

Information Systems (IS):

- A. Standardize the organization's tools used to maintain, update and create new web properties
- B. Documentation of systems, workflows and end user processes
- C. Update network, server and data storage infrastructures
- D. Deployment of IPS (Integrated Project System database)
- E. Redevelopment of OHC web properties, including ohiohistory.org, Ohio History Central and online retail store

- F. Develop and implement ways to include or increase access to underrepresented histories through our web properties, including the online collections catalogs, Ohio Memory, Ohio History Central and ohiohistory.org

Financial and Administrative Services (FAS):

- A. Implement dashboard of key organizational information (with IS)
- B. Expand financial projections to look into future years, based on organizational and/or divisional projects and priorities
- C. Expand/upgrade safety and security measures as part of ongoing Campus development and historic sites
- D. Centralize purchasing for supplies and related materials
- E. Update policies in EIM related to RIF/Reorg and other legal intersections (with OF)
- F. Examine/update EIM policies and procedures to better address diversity, equity, accessibility, and inclusion
- G. Examine issues related to pay equity and make adjustments as needed (as finances allow)
- H. Provide professional development and training related to diversity, equity, accessibility, and inclusion
- I. Focus on on-boarding and financial literacy
- J. Develop and improve internal relationships and communications with staff to be of better service to the organization; and, to have a “seat at the table” as OHC plans develop

Marketing and Communications (MC):

- A. Strategic communications framework
- B. Brand management (decisions and leadership in how we maintain and evolve)

- C. Audience Insights evaluation instrument/technical support for staff and summation of results of strategic plan projects
- D. Media relations strategy/implementation
- E. Support the pilot of new membership program
- F. Support the re-development of Ohio Village
- G. Redevelop/reimagine ohiohistory.org (with IS)
- H. Build a strategic tourism plan with the sites

Development (DEV):

- A. Comprehensive Campaign
- B. Grow earned/unrestricted revenue through membership, annual fund, sponsorships, new programs
- C. Develop business development strategy for OHC
- D. Develop fundraising plan/capacity for Octagon settlement
- E. Develop resources for supporting site fundraising
- F. Increase planned giving expertise and marketing

Cultural Resources (CR):

- A. Support Ohio Village upgrades
- B. Collections Facility build and move
- C. Conduct assessment of site management structure and services
- D. Support work to study the move of MAAMCC to Columbus
- E. Obtain World Heritage Inscription and implement master plans
- F. Support reaccreditation (with site management partners)
- G. Establish reburial area

- H. Support Campus transformation
- I. Develop and launch three new sites: Luncy, Poindexter, Octagon
- J. Completion of Harding Phase 2
- K. Support establishment of proactive NAGPRA program and processes (with AIR)
- L. Improve physical and intellectual control of all collections
- M. Build new Ohio River Museum
- N. Stowe redevelopment
- O. Grant Bicentennial (with EDO)
- P. American Indian interpretation and AIP adoption (with AIR)
- Q. Establish project management protocols and processes (with OF)

American Indian Relations (AIR):

- A. Implement AIR policy across the organization
- B. Establish proactive NAGPRA program and processes
- C. American Indian interpretation
- D. Tribal Nations Conference

Ohio Forum (OF):

- A. Track and report on strategic plan to all stakeholders
- B. Establish project management protocols and processes
- C. Ensure budget reflects priorities (with FAS)
- D. 88 Counties
- E. Carbon-neutral
- F. Support/grow a culture of innovation, inclusion/equity, financial sustainability, measurement/data discernment

Evaluation

In conjunction with the discussion and determination of Organizational Major Projects and Division/ Departmental Major Projects, the Ohio Forum went through a rigorous process of aligning human and financial resources required to carry out the plan. Additionally, as a reminder, this strategic plan directly followed a strategic reduction in force and reorganization - partially resulting from fiscal stewardship needs following the height of economic shifts during the 2020 COVID pandemic.

The strategic plan is a living document, which is intended to be adjusted annually. Progress of the strategic plan will be monitored in the following ways:

- Monthly Updates - Once a month, at an Ohio Forum meeting, museum staff will come together to report on progress, identify points of collaboration on upcoming activities, and tackle issues that may be causing delays.
- Quarterly Updates - Once a quarter and/or in conjunction with Board meetings, information will be gathered for an overarching update for the Board that will be based on reports from and discussion with the Ohio Forum and any other staff members who may be responsible for key tasks that quarter.
- Annual Performance Reviews - The strategic plan provides a clear framework for focusing performance goals and evaluating each staff member against organizational priorities, objectives, and tactics. The strategic plan should be a reference document during the performance goal setting process, as well as the performance review process, to ensure that each staff member is carrying out their strategic responsibilities as planned.
- Annual Reporting on Metrics - In alignment with this strategic plan, staff members will be monitoring and tracking major projects and reporting on measures of success in order to demonstrate progress, growth, and comparative impact.



Ohio Village Feasibility Study Executive Summary

June 30, 2006

Prepared by
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OHIO HISTORICAL SOCIETY



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A. Introduction

The Ohio Historical Society (OHS) conducts an expansive range of activities related to the interpretation, collection, and preservation of Ohio's heritage, including administering 60 historic sites and museums throughout Ohio, the Ohio Historic Preservation Office, the State Archives, and other history functions for the State of Ohio. The Society's consolidated operating budget for fiscal year 2005 was \$21.9 million, with approximately 60% of the budget derived from state general operating support.

Recently, the OHS began an effort to change its organizational business model. The Society has taken an entrepreneurial approach to better serve the needs of its customers, take advantage of changing trends and to diversify its funding base. This effort has resulted in refining aspects of the Society's ongoing endeavors and exploring new options to meet customer needs. For example, in order to provide museum visitors with a new experience, the OHS has launched a multi-year project to transform the entire museum floor. The goal is to redevelop all exhibits to increase the organization's relevance and connection to a broad array of potential audiences.

As a result of listening Central Ohio audiences, the OHS recognized that many residents have a great deal of interest in the Ohio Village property, and that Ohio Village plays a role in terms of public perception of the organization. In an effort to learn how to best meet the public interest, the OHS engaged a consultant team led by F2/Inc. to develop a self-sustaining business plan for the Ohio Village property. This executive summary provides an overview of the plan that the consultant group produced and starts to place that plan within the context of other OHS programs and goals and the Central Ohio and statewide Ohio markets. In addition, this document outlines some of the key next steps that the OHS will take to improve the current Ohio Village experience.

"The surrounding area is turning around; OHS could be part of, or a leader in, developing a vibrant area of Columbus."
-- *Mini-retreat participant*

B. Ohio Village Current Situation

Located in Columbus on an 8.5-acre parcel adjoining the Society's headquarters building and museum, Ohio Village was designed to recreate the appearance of a typical county-seat town in Ohio during the mid 19th century, about the time of the Civil War. The Village, which opened in 1975, features a town square surrounded by fifteen buildings portraying different functions ranging from a town hall to private dwellings. None of the structures within the Ohio Village are historic buildings. While Ohio Village was successful, particularly in the 1980s, the business model did not keep up with changing audience interests, leading to a decline in attendance and earned income over time.

In fiscal year 2001, the OHS sustained a series of budget reductions at the state level leading to a 30% reduction in institutional staffing levels. This necessitated reduced program and service levels throughout the institution. In prioritizing program service reductions, the OHS endeavored to maintain for public access its authentic historic properties. As a result, Ohio Village was closed for regular public access in 2003.

"The Ohio Historical Society holds *all* of Ohio's historical treasures."
-- *Mini-retreat participant*

Since that time, Ohio Village has been used for public programming, school and other groups and external rentals. The public programming in Ohio Village focuses mainly on seasonal events; school and other groups may gain access to limited programming at Ohio Village through advanced scheduling.

Since the Ohio Village is not an authentic historic property or place, it presents a unique opportunity for the OHS to use this asset with relatively fewer restrictions. This also means that the expectations for funding and return on investment are more stringent than for the other locations and programs of the organization.

C. Ohio Village Master Plan Background

With the restructuring of the OHS begun in June of 2004, the Society began placing a greater emphasis on building upon the organization's strengths and becoming more entrepreneurial, creative, efficient, collaborative and accessible. As a potential means to accomplish these objectives, the OHS was interested in determining the feasibility of revitalizing the Ohio Village as a self-sufficient element of the Ohio Historical Society's larger goal of attracting new audiences and repositioning the headquarters facility campus. To assist in this process, F2/Inc. was

engaged as a consultant to craft a Master Plan that outlines short- and long-term strategies for development and promotion. Goals for the Master Plan included:

1. Develop a “sustainable destination attraction” through tested revitalization techniques that would result in renewed positioning of Ohio Village as an experiential and educational resource; fun, relevant, available, and attractive; a “learning laboratory” for a new way of thinking.
2. Incorporate market-driven, audience-specific programs and services that would speak to the array of demographic groups that inhabit the city and state.
3. Provide inventive interpretation, programming, and promotion methods to generate excitement and passion in the community, attract year ‘round attendance and sustainable revenues.
4. Incorporate methods to keep the program flexible and lithe in order to meet the changing needs of regular users and potential customers.
5. Include a realistic implementation and financial plan with and a self-sustaining, revenue-generating business model.
6. Contribute to the Columbus economy and economic development of the surrounding area with a context that creates connections with adjacent neighbors and attractions.

D. Methodology and Findings

The first phase of the Master Plan project included stakeholder scanning and preliminary research and assessments.

To gain critical stakeholder feedback, nine, three-hour mini-retreats were held with more than 50 individuals the week of June 27, 2005. Participants included individuals knowledgeable about the needs and issues of Ohio Village and the community, including OHS members, OHS trustees, funders, marketing partners, government officials, historical organization leaders, economic developers, tourism officials, donors, and individuals representing foundations and community groups.

“Many people ask, ‘what’s going on with Ohio Village?’ – creating an opportunity for the buzz to become positive and sustained.”
-- *Mini-retreat participant*

Participants were asked to consider Ohio Village’s strengths, weaknesses, opportunities, and threats as they related to its brand positioning, the competitive environment, the visitor experience, and marketing programs. Target audiences were prioritized as a basis for a concept brainstorm that asked the questions “what could Ohio Village become?” “How could Ohio Village set itself apart from other attractions?” And “how could we exceed visitor expectations?” Of note, retreat participants consistently mentioned the following components:

- Ohio Village must be unique, relevant, and offer the element of surprise, entertainment, fun, and humor;
- Ohio Village must retain a relationship to the OHS brand, mission, and core competencies;
- The Ohio Historical Center and Ohio Village campus must be beautified;
- Ohio Village should consider retail, food, lodging and transportation options;
- The Ohio Village experience should be interactive;
- Visitors to Ohio Village should have a way to become oriented to the experience;
- Ohio Village must be affordable and have a perceived value;
- Ohio Village should offer family programming and appeal, and programming for all weather conditions;
- Ohio Village must become a place that attracts repeat visitation; and
- The OHS must maintain a commitment to marketing.

Attractions understand that their programming must appeal to diverse audiences and encourage participation rather than observation. Organizations are embracing the philosophy that visitors need something “new” on a regular basis.
– *Trends noted in attraction interviews*

The second phase included assessing property schematics, story lines, scripts, and content guides; conducting an operations evaluation including budgets and financials; reviewing available secondary research; and conducting a marketing audit. Interviews were also conducted with several non-competing for profit and not for profit

attractions that were perceived to be successful models. Following are a few trends that materialized in the attraction interviews:

- Attractions cited the need to diversify funding sources;
- Attractions that have been historically reliant upon foundations and memberships are changing their strategies and considering application to federal, state, and local grant programs;
- Many attractions are considering adding additional retail elements to expand income potential;
- Audience development and diversification is a decisive trend, and programming is following suit;
- Most have increased the “entertainment” element of their programming; and
- Attractions that have typically depended on specific niche marketing strategies are now implementing campaigns designed to reach the general public.

E. Concept Development

When all of the considerable conceptual ideas generated by mini-retreat participants were organized and blended with the consultant’s observations, 17 themes emerged. The consultants and members of the OHS Ohio Village Steering Committee then further refined the concepts and agreed to focus on a set of ten.

1. **Outdoor Children’s Museum.** This concept creates a fun and learning destination centered on interactive presentations of Ohio History and places of historical significance throughout the state.
2. **Historic Amusement Park.** This concept centers on creating a festival atmosphere similar to a “perpetual county fair” or a replica of traditional trolley parks.
3. **Ohio Artisan/Crafts Center.** This idea creates a living celebration of Ohio arts through historic and contemporary visual and performing arts and design.
4. **Gardening and Agriculture, Food and Wine.** Ohio Village would become a marketplace for interactive experiences in Ohio agriculture, gardening, and food.
5. **Overnight Experiences and Retreat Center.** Ohio Village could offer a distinctive camping or lodging experiences for leisure travelers and could at the same time become a unique retreat facility for learning groups of all kinds.
6. **Historic Sporting Complex.** This concept is driven by Columbus’s sports history and contemporary sports culture, and would be a natural location for sporting group conferences and amateur sporting club outings. Visitors would be able to participate in historic sports games and activities.
7. **Antiques, Architecture, and Historic Restoration.** “This Old Ohio House.” Ohio Village could become a showcase for Ohio architecture and a learning laboratory for antiques, furniture restoration, and home/building preservation.
8. **Living History Village.** Ohio Village could remain a replication of an historic village, but move forward in time and provide more robust programming to provide a new relevancy to visitors.
9. **Shopping and Entertainment District.** This is the definitive retail-based concept, offering food, entertainment, and shopping – a community of “real” businesses.
10. **Our Town.** This concept is weighted heavily in year ‘round events, educational experiences, and exhibits, with programming targeted to specific audiences on a month-by-month calendar.

F. Concept Refinement and Testing

Two distinct research efforts were conducted to evaluate the concepts from the most important perspective: the customer’s point of view. The first study explored the ten possible concepts to identify the best options for development. After the concepts were evaluated and the options narrowed, a second research effort was conducted to provide a clearer focus for short and long-term development strategies.

1. Concept Testing Research Study

The first study was conducted via an on-line survey. In total, 475 surveys were completed - 100 within the Columbus area and 375 outside Columbus but within 150 miles of the city. As sustainability had been identified as a key goal for the revitalization of Ohio Village, the study provided financial projections based on visitation and pricing.

With a scoring system based heavily on revenue generation, the Historic Amusement Park was the highest rated concept. The Overnight and Retreat Center ranked second. Two other concepts - the Outdoor Children's Museum and the Shopping and Entertainment District - also received high ratings. Following are details of the top four concepts as rated by consumers, ranked one through four in terms of revenue generating potential.

	(1) Historic Amusement Park	(2) Overnight & Retreat Center	(3) Outdoor Children's Museum	(4) Shopping & Entertainment District
Combination Score	100	67	66	65
Projected % of Columbus DMA Households Visiting (1x/year)	14.5%	9.1%	11.6%	13.0%
Projected Visitors (annual)	229,177	143,376	182,839	205,260
Average Willing to Pay (pp/visit)	\$12.65	\$13.58	\$10.53	\$9.19
Projected Revenue	\$2.9 million	\$1.9 million	\$1.9 million	\$1.8 million
Financial Index	168	113	112	110

It is interesting to note that the idea of a Living History Village had reasonable overall appeal but rated well below average in perceived value and frequency of visitation, making the concept one of the weaker ideas in terms of potential sustainability. This is consistent with industry trends. Across the nation, living history houses and villages have experienced decreased visitation over the past several years, resulting in some cases in decreased programs, staffing, and hours open to the public. Audiences have started to interact with history in other ways, such as through web sites and documentaries.

2. Concept Refinement Research Study

While the Historic Amusement Park concept ranked exceptionally well, the OHS felt that the concept was too capital intensive and pushed the mission of the organization. Therefore, the OHS requested that additional audience research be conducted to learn which specific aspects of top rated concepts and general programming ideas were most attractive to potential audiences. This would allow the organization to be more strategic in its investment strategy and to apply the results of the planning process more broadly to programming across the organization.

This concept refinement research study was also conducted via on-line methodology and reflected a total of 567 completed surveys. Since revenue was the focus, a pricing technique, the van Westendorp method, was used to identify the best pricing strategy for specific amenities, combinations of features, and programming.

The first step was to evaluate the relative appeal of the various events under consideration. The top three events in terms of appeal were a weekend market festival (86%), historic celebrations or festivals (83%), and historical reenactments (74%). When the activities for all ages are considered, the most appealing features that could be included as part of the attraction fell out as follows:

Activities for All Ages

Concept	Rating
Train / trolley rides through park	20.6
Outdoor playscape - explore history of transportation	19.5
Historical amusement rides	15.8
Outdoor learning experiences - building things, hands-on nature & science experiences	12.5

In terms of the setting, a historic town with replica buildings and costumed characters was the most popular closely followed by a park-like setting with paths and wooded areas and landscaping that includes gardens, waterways and fountains.

With the use of conjoint analysis, one can make projections regarding potential visitation and revenue based on specific scenarios. As might be expected, attendance increases as each feature is added and attendance increases more dramatically when the price is lower. With the most aggressive price increases, visitation rises to somewhat over 150,000; with no price increase, visitation increases to almost 300,000.

3. Conclusions

- The Ohio Historical Society faces many financial challenges, making reinvestment in Ohio Village a challenge.
- The OHS has a very good image in the Columbus community in terms of its mission, but at the same time experiences less than desirable levels of general awareness.
- There is a defined image of Ohio Village among area residents; however, lower familiarity ratings should drive the marketing plan.
- The Columbus area tourism economy is growing, and national travel trends show strengths among special interest, cultural event, “learning,” historical, theme park, and weekend getaway travelers, an indication that the time is right and the environment is ripe for additional high-quality visitor experiences in the Columbus area.

G. Ohio Village Park

Ultimately, the goal is to improve accessibility to Ohio history by providing experiences that attract larger and broader audiences to the Ohio Historical Center and the Ohio Village property and to generate profits that allow for reinvestment in other areas of the organization. It can be argued that the historic amusement park, or trolley park, concept performed the best in the consumer research studies in terms of consumer preferences, appeal, and potential visitation. However, this concept was also one of the most capital-intensive options. While this concept may be considered as the Master Plan vision for the long term, the feasibility plan instead phases particular improvements into the property over the next few years, creating a new destination for education, leisure activities, play, and entertainment in an attractive setting.

For the purposes of the Master Plan, the new destination is called “*Ohio Village Park*.” As described in the Plan, Ohio Village Park is viewed as a history and entertainment park, and the campus would ultimately feature indoor and outdoor entertainment and event venues, playscapes and game areas, and family activities. The park setting would offer natural history learning experiences, with replicas of some of Ohio’s most unique and interesting natural features. The exterior environment is critical to establishing a “place people want to be”, and was planned to include expansive green spaces, water features, gateways, screening, indigenous plantings, woody areas and pathways, picnic areas, and heirloom and period gardens.

The Master Plan assumed that the park would be open to the public three days a week for 26 weeks during the warmer months. Buildings and grounds would be available for corporate event rentals, school tours, and for specialty programming throughout the year. General admission pricing was assumed to remain at \$7 for the first four phases, and would then be raised to \$8 in Phase V. In the Master Plan, a visitor orientation program was important to the Park. The Plan called for visitors to enter through the Historical Center, view a multi-media orientation presentation in the auditorium, and then proceed through the exhibits and into the park.

1. Keys to Success for the Master Plan

The Master Plan argued that the new initiative must be embedded in the organization. An adequate marketing budget was deemed critical, as was the quality of features, installations and programming. Planned updates to the visitor experience were cited as crucial for repeat visitation, as customers would be looking for something new at all stages. Retail and other ancillary sales were an important part of the projected operating income.

2. Barriers to Success for the Master Plan

The Master Plan relied on a robust and aggressive funding and staffing plan, but it had a limited exit strategy and limited reliable data to create projections in some key areas of revenue generation. Successful implementation of the Master Plan would require single-minded attention by many in a multi-faceted organization as well as exceptionally favorable market conditions.

Risks included weather, liability, admissions and revenue realities, limited knowledge of ancillary sales industry trends, implementation complexity, capital investment and fundraising. The capital investment required was nearly \$9 million over the five phases, which is almost double the current biennial capital budget for the entire Ohio Historical Society.

3. Implementation Plan

When considering a realistic timeframe for realizing the ambitious vision for an attraction such as Ohio Village Park, the OHS wished to approach the project with a “crawl...walk...run” strategy. Included in the Master Plan is a section that outlines the business aspects of a phased 5-year implementation plan with the assumption that there would be a one- to two-year bridge period in which to seek funding and build support for the new Park.

PHASE I	PHASE II	PHASE III	PHASE IV	PHASE V
Planning & Improvements	Add Transportation Playscapes, limited Food & Beverage	Add Outdoor Learning Areas	Add Leisure Equipment	Add Train and 1-2 Trolley Park Rides
← Events and Programming →				

a. Phase I-V: Events and Programming

The Master Plan suggested that events should be viewed as an extension of the marketing program, as they bring folks to the property and help communicate an environment of activity and reasons to return as a day visitor. The Plan recommended that events would continue to occur in the Ohio Village throughout all the phases as a key way to drive attendance.

Currently Programmed Events

- Glorious Fourth (July 4th)
- All Hallows Eve (Saturdays and Sundays the two weeks prior to Halloween)
- In Praise of Thanksgiving Dinner Concert
- Dickens of a Christmas event
- Dickens Dinner (dinner and program during Dickens of a Christmas event)
- Valentine’s Dinner
- From the Pubs of Ireland
- Spring Fever event
- Pleasures of the Cup: Drinks from different time periods (four seasonal events annually)
- Ohio Cup Vintage Baseball Festival (two days over Labor Day weekend)

Recommended New Events

- Ohio at War Reenactment (one three day weekend)
- Home from the Battlefield Reenactment (one two-day weekend)
- Day camps for kids (six weeks in the summer, five days/week)
- Weekend Market Festival (summer weekends, phased to eight weekends by Phase V)
- Concert Series (summer week nights)

b. **PHASE I: Planning and Improvements**

The planning and transition period allows for commissioning the site master plan, developing community outreach programs, project administration and staffing, conducting assessments, implementing stakeholder communications, fundraising, and investing in basic buildings and grounds improvements. Current successful programming and events would continue as in the recent past, with some enhancements, to create a revenue stream in the short term.

c. **PHASE II: Transportation-Themed Playscapes**

Three to five playscape areas were planned to be located throughout the property, with one adjacent to the Historical Center as a companion piece to a potential indoor playscape. The transportation theme was intentional, as Ohio has many transportation-related stories to tell and it reinforces the longer-term vision for a trolley park destination.

Playscapes that help put transportation into context can subtly tell a broader story, while still being fun and entertaining. In addition to providing information on Ohio's rich pioneer settlement history and its aviation history, these playscapes could – at least for older children – explain for example, why the National Road was so important not only within Ohio but for the nation as a whole. Landscaping was cited as important to help put these playground pieces into context.

Ohio was important to early and later American travel due to its location. Major waterways made it critical path of westward migration. Ohio natives such as Richard Clayton, Wilbur and Orville Wright, John Glenn, and Neil Armstrong make the transportation story even richer. It was recommended that the playscapes follow either a “genre” concept (water, air, and land), or replicate time periods.

Potential Interpretation Themes for Transportation Playscapes: Small waterway travel, land and water transportation, the National Road, Native American trade, early exploration and settlement, major migration and industrialization, canals and Great Lakes travel, ballooning and early flight, the Wright brothers, John Glenn, and Goodrich/Goodyear blimps.

d. **PHASE III: Outdoor Learning Areas**

The Master Plan called for outdoor learning areas to be available for building things and participating in hands-on agricultural, nature, and science experiments. Visitors could learn about plants, birds, and animals through self-interpretation and, for special occasions, contracted naturalists or tours given by the site's master gardener.

Ohio's natural history was positioned to be the overall theme of the campus landscaping plan. Offering both active and passive learning, the Park would offer the best of Ohio's natural features with replicated elements like caves, waterfalls, glacial deposits, cliffs, gorges, meadows, and forests and other archeological and geological “wonders.” Agricultural heritage would be also represented with tiny “fields” of crops and period and/or heirloom gardens and a hedge maze. The existing baseball diamond and transportation-themed playscapes would remain in place and be incorporated into the overall scheme.

Potential Interpretation Themes for Outdoor Learning Areas: Plants and animals, flora and fauna, agriculture, natural resources, weather, coal mining and oil and natural gas drilling, personal time vs. geologic time.

e. **PHASE IV: Leisure Equipment and Games**

In Phase IV, leisure equipment would be available for rent such as paddle boats, canoes, old fashioned bicycles, and stilts; family activities like history-themed miniature golf, a garden maze or lawn games would be added to the overall landscape. Families could rent equipment with which to play badminton, shuffleboard, croquet, horseshoes, and lawn bowling. Two new retail outlets would be added at which customers might purchase themed souvenirs and a great selection of transportation

books and games. Ohio-made merchandise could quite easily fit into the retail mix. A new casual sit-down restaurant was a part of this phase.

Potential Interpretation Themes for Leisure Activities: Lawn and leisure game skills, the history of leisure games and activities, the rise of the leisure society, historical change in the “conditions” of life, the relationship between leisure and health and fitness, historical influences on leisure today, leisure time participation among various ethnicities, leisure activities in other countries and cultures, and scenarios for leisure in the future.

f. **PHASE V: Train or Trolley Rides and Amusements**

The Plan recommends that, by Phase V, Ohio Village Park would offer train or trolley rides through the park. The track would circle the grounds, and conductors would interpret the surroundings with interesting stories and quirky and educational facts about Ohio history. Visitors could board and disembark from the train or trolley at several “stations” throughout the grounds. In addition, one or two authentic amusement rides, such as a carousel or Venetian swing could be added to the grounds as the beginning of the transition into an historic amusement park.

Potential Interpretation Themes for the Train and Trolley: The history of transportation, public transportation, trolley parks and cars; the role of amusement parks in the heritage, economy, and urbanization of Ohio; Ohio’s role in the industrialization of America; the world’s fair movement; racial, segregation, and social class issues; labor laws and working conditions; histories of Ohio’s currently operating mega-parks and its 50-plus original trolley parks; the technology of theme park rides; and ethnicities and immigration.

g. **SUCCESSIVE PHASES – The Trolley Park**

Ohio was once home to as many as 54 trolley and amusement parks, providing a natural cultural and historic foundation for the concept of recreating an historic amusement park on the grounds of Ohio Village. According to the International Association of Amusement Parks and Attractions, U.S. amusement parks attracted 328 million visitors that spent \$10.8 billion in 2004.

Clearly, Ohio holds a convincing position in both amusement park history and today’s amusement park economy. Three Ohio parks are classified in a list of the top 20 oldest establishments in the world, and the National Amusement Park Historical Association (NAPHA) ranks features of many contemporary Ohio parks as the best or biggest in the world.

As an historic amusement park, Ohio Village Park could showcase Ohio’s amusement park history and culture through a variety of outdoor experiences. The destination could debut as a trolley park, depicting a time period between the 1880s through the mid 1920s. The centerpiece of the Park could be a grand pavilion, where visitors could take a meal in an elaborate dining room, listen to a lecture in an auditorium, or participate in a game of duckpin bowling or checkers on the porch as they did in the 1888 pavilion at Cedar Point.

Kids and adults could purchase tickets for period amusement park rides such as a carousel, Ferris wheel, a circle swing, fly-o-plane, flying scooter, tumble bug, Venetian swing, and a figure-eight roller coaster. The Park could invent its own unique ride that takes guests through history. The rides themselves could be a combination of found authentic pieces and reproductions designed with the original look and feel but developed utilizing modern safety standards. Special features could be rides that were introduced in Ohio parks or those invented or manufactured in Ohio.

Entertainment could be offered in a movie house, a band shell, and in a music/dance hall. Many forms of music would be featured -- musicians could stroll the property, and name musicians could perform in the dance hall, as was widely practiced in early trolley parks. Vaudevillian-style entertainment was also popular in trolley parks. In terms of amusements, families could find large arcades, games of chance, a “Tunnel of Love,” a fun house, a house of mirrors, magicians and side shows, fortune tellers, even a museum of oddities.

Over time, dining establishments and resort-like lodging sprang up in areas just outside trolley parks. In the long term, Ohio Village Park could evolve in a similar fashion, offering old-time lodging and dining on other areas of the OHS property.

4. Management Summary

The Master Plan called for the management team for Ohio Village Park to be comprised of existing facilities management, museums division, and marketing and business development staff. New positions required to run the operation include a site manager, master gardener, food and beverage and staff supervisors, and retail staff for supervision of the playscapes, outdoor learning areas, and leisure equipment.

In addition to the advisory support of the board of trustees, the plan recommends the addition of three committees from which to gain counsel and create support for the Park project: a space and facilities planning committee, a neighborhood committee, and a business committee.

5. Operating Budget

The Master Plan offered the following operating budget, which represents projections for general admission attendance based on the conjoint analysis. And as the Ohio Village project must be sustainable over and above other OHS income, visitation is estimated as incremental to that of the Historical Center. Projections are based on the assumption that an adequate marketing budget exists to support attendance goals. With this model, Ohio Village Park would operate at an annual profit by Phase V.

The estimate for required capital investment is about \$9 million to fund major grounds beautification, improvements to existing buildings, landscaping and construction of playscapes and outdoor learning areas, and construction of a multi-use event facility.

	Phase I	Phase II	Phase III	Phase IV	Phase V	5-Year Total
REVENUE						
General Admission	\$0	\$188,178	\$555,452	\$1,169,488	\$2,774,731	\$4,687,849
Programming and Events	\$522,479	\$626,844	\$761,077	\$931,289	\$1,822,857	\$4,664,545
Facilities Use	\$70,525	\$106,814	\$135,971	\$163,198	\$203,360	\$679,868
Other Income	\$72,250	\$215,000	\$525,000	\$305,000	\$295,000	\$1,412,250
PROJECTED INCOME TOTAL	\$665,254	\$1,136,835	\$1,977,499	\$2,568,976	\$5,095,948	\$11,444,512
EXPENSES						
General Admission	\$0	\$33,069	\$132,290	\$240,218	\$452,043	\$857,619
Programming and Events	\$248,256	\$283,176	\$334,710	\$393,745	\$475,536	\$1,735,421
Facilities Use	\$9,940	\$10,537	\$13,156	\$15,788	\$19,734	\$69,155
General Operating	\$765,000	\$437,000	\$509,800	\$624,000	\$632,400	\$2,968,200
Staff	\$366,380	\$675,657	\$935,626	\$1,122,766	\$1,329,731	\$4,430,160
Marketing Subtotal	\$251,940	\$351,857	\$362,850	\$633,150	\$628,205	\$2,228,002
TOTAL PROJECTED EXPENSES	\$1,631,576	\$1,780,759	\$2,275,275	\$3,013,879	\$3,517,915	\$12,219,402
OPERATING SURPLUS/(DEFICIT)	(\$966,322)	(\$643,923)	(\$297,776)	(\$444,903)	\$1,578,034	(\$774,890)
Interest Costs (est. @ 7.5%)	\$0	\$147,395	\$389,414	\$650,684	\$984,233	\$2,171,725
Indirect Costs (12.5 Adj. EBIT)	\$203,947	\$222,595	\$284,409	\$376,735	\$439,739	\$1,527,425
Depreciation (30 yrs SL)	\$8,333	\$43,833	\$80,067	\$124,233	\$140,900	\$397,367
Depreciation (15 yrs SL)	\$25,000	\$101,533	\$168,200	\$278,200	\$278,200	\$851,133
Depreciation (5 yrs SL)	\$34,000	\$34,000	\$119,000	\$119,000	\$119,000	\$425,000
NET PROFIT/(LOSS)	(\$1,237,602)	(\$1,193,280)	(\$1,338,865)	(\$1,993,755)	(\$384,038)	(\$6,147,541)
Starting Cash	\$0	(\$1,965,268)	(\$5,192,182)	(\$8,675,780)	(\$13,123,102)	
Surplus/(Deficit) + Interest + Indirect	(\$1,170,268)	(\$1,013,913)	(\$971,599)	(\$1,472,322)	\$154,062	
Capital Investments	(\$795,000)	(\$2,213,000)	(\$2,512,000)	(\$2,975,000)	(\$500,000)	
ENDING CASH	(\$1,965,268)	(\$5,192,182)	(\$8,675,780)	(\$13,123,102)	(\$13,469,041)	

6. Fundraising Plan

The Ohio Village Park initiative is only one of several sizeable projects underway at the OHS that will require the OHS to accelerate its capital spending. Because sponsorship and corporate development depends primarily on visibility and community perception as much as a good idea, the Master Plan's fundraising recommendations integrate an image-boosting plan with a sponsorship, corporate support, and grant application initiative that has aggressive goals to raise a total of \$1.5 million over the five phases.

7. Marketing Plan

The Master Plan argues that the Ohio Village Park would simply not be successful without a substantial marketing investment. And while the current marketing budget is the result of fairly recent increases, that trend must continue. The Plan noted that it would be particularly important that marketing funding levels for events and new features, as they would be added, would be sufficient.

While the early phase master plan marketing budgets are without question higher than typical for many industries, these levels were considered necessary to meet attendance projections, particularly for events. As the marketing budget ramps up by Phase V and revenues increase incrementally, the percentage of marketing expenses relative to projected revenue becomes more characteristic of those you might see in the business plan for a successful retail product or service.

Fundamental to the marketing program would be the geographic target market. The research findings suggest that more than 70 percent of those surveyed outside the Columbus area have not visited any Columbus area attractions, and it could therefore be assumed that it would be difficult to convince those audiences to make Ohio Village Park a destination, at least in the short term. As such, the Master Plan marketing strategy targets a broad cross-section of the population, including adults (skewing women) with children, aged 25-54, with a household income of \$50,000 plus in the Central Ohio media market. This method would assist the OHS in meeting the goal of reaching residents that have not been necessarily inclined to visit the campus in the past. Business-to-business targets include event planners, school and tour group organizers, OHS members, opinion leaders and financial partners.

Claim a position as a dominant portal for on-line information. The OHS Internet presence must be new, fresh, and constantly changing. Build interactivity among and become the gathering place for like-minded people by involving customers and creating two-way conversations.
– Ideas noted in individual interviews

Within the master plan, the marketing plan suggested several focus areas and some ideas for each. Those areas include brand positioning, increasing awareness, utilization of the Internet, understanding the importance of kids as decision makers and influencers, improving statewide visibility, targeted event marketing, developing inter-department collaboration, research, and buying cycle strategies. The plan also suggested the addition of seasonal marketing campaigns that would promote both events and grounds activities.

8. Success Measurements

The success of Ohio Village Park would be evaluated first and foremost in terms of financial measures; its ability to be self-supporting initially its ability to generate revenue that could benefit other programs of the organization in the long term. In addition to revenues and operating surpluses, the Master Plan suggests that the OHS should also evaluate attendance trends including repeat visitation, the visitor experience, the ability of the Park to reach OHS educational goals, customer value measures, marketing return on investment, market share, image and awareness levels, and the impact the Park could have in generating additional visitation to the Ohio Historical Center museum and other sites statewide.

H. Conclusions

The Ohio Village Master Plan developed by F2/Inc. recommended an ambitious plan to revitalize the Ohio Village property. The research studies conducted as a part of the process have been especially invaluable to the OHS as the organization begins a period of change focused on its customers. However, implementing the Ohio Village Master Plan would require a disproportionately large fraction of the organization's resources to be invested in a

relatively risky venture at a non-historic property. In addition, the changes needed to create a sustainable operation in the newly imagined Ohio Village Park may alienate the loyal Ohio Village customer base.

Therefore, the Ohio Historical Society determined that full implementation of the proposed Ohio Village Master Plan would not allow the organization to fulfill its mission in the most efficient and equitable manner and consequently should be deferred for prioritization against future projects. In the meantime, OHS will use much of the research and analysis generated in the master plan process to guide key strategic investments into the Ohio Village property, as well as other programs throughout the state. This strategy will enable the organization to best serve the needs of its many customers.

■ **Ohio Village Near-term Investments**

Using the ideas developed through the stakeholder scanning and tested through audience research, the Ohio Historical Society will expand events offered at the Ohio Village. While the buildings of Ohio Village are important to many customers, interacting with people and taking a step back in time were also key components of their positive impressions of Ohio Village. Events will provide an important way for visitors to have this multi-faceted, in-depth experience that they seek in the Village. In 2007, there will be at least one major event at Ohio Village every month from March through December. In June, a large festival celebrating Ohio food and music will debut at the Village.

In other changes planned to begin in summer 2006, children will be able to explore history through newly developed day camps. This program will be piloted in 2006 and expanded in future years. The Society will also explore making the grounds available to the public on certain weekends during the summer, for those who just want to walk out to the Village while they are visiting the museum. This initiative may be continued in future years based on visitor response.

In August 2006 the Society will also install and market an events tent that will be connected to the American House Hotel. This structure will make it possible for the OHS to host larger receptions and public programs than can currently be accommodated at Ohio Village. After the initial investment is recovered, the events tent is expected to generate revenue to support future projects and programs.

■ **Master Plan Applied to Other Parts of the Organization**

The Ohio Village stakeholder scanning and audience research has provided an important way for the Ohio Historical Society to learn more about its potential audiences and help it achieve its mission to connect people to Ohio's past. Further, the Master Plan provided a model for developing a fully loaded business plan that enables the Society to plan for and assess the value of investments in capital development and operating projects. While the Master Plan for Ohio Village will not be implemented immediately, it has been instrumental in shaping conversations and planning that will lead the organization to be even more market and customer focused while expanding its capacity to make fully informed investment decisions.



**OHIO VILLAGE
BUILDING BREAKDOWN**

NOVEMBER 1, 1995



OHIO HISTORICAL SOCIETY
1982 VELMA AVENUE
COLUMBUS, OHIO 43211-2497
PHONE: 614-297-2635
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OHIO VILLAGE BUILDING BREAKDOWN

BUILDING

Exhibit Facilities

1. TRAIN DEPOT

- Historical Significance:

When the railroads expanded in the post-Civil War period, towns people in every village wanted their community to become a stop on the railroad. The railroads connected regions, linking the nation in a vast marketplace. Goods, information, and people passed through the town depot, which usually gave visitors their first impression of a town.

- Physical Requirements:

Move the existing pharmacy building to the entrance of the village, the present location of the Gate House. It will house ticket sales, orientation information and restrooms. The building will require interior and exterior upgrades along with the addition of utilities (gas,electric, and water).

Total Square Feet: 1800 @ \$150.00	\$270,000.00
<i>Orientation Video</i>	\$50,000.00



OHIO VILLAGE BUILDING BREAKDOWN

BUILDING

Exhibit Facilities

2. DOCTOR'S RESIDENCE

- Historical Significance:

The late nineteenth century was an age of increasing specialization and professionalization. This location will be used to show changes in the doctor's medical education and in medical technology.

Physical Requirements:

Update some interior finishes, interpretation material and the addition of utilities (electric and gas).

Total Square Feet:900 @ \$100

\$90,000

3. PHARMACY/SODA FOUNTAIN

- Historical significance

In the late nineteenth century, pharmacies went from apothecaries to social centers, from shelves of mysterious bottles and jars to dispensers of soda water. The drugstore sold patent medicines, alcohol, and opium, resulting in the demand for temperance and drug reforms.



OHIO VILLAGE BUILDING BREAKDOWN

BUILDING

Exhibit Facilities

(Pharmacy cont.)

- Physical Requirements

The Harness Shop and the Weaver's Shop will be converted into the Pharmacy. There will be an addition to the back of the building along with the addition of a kitchen facility & utilities (gas ,electric and water). The building will have food and other items for sale.

TOTAL SQUARE FEET:1650 @ \$150.00 \$247,500

4. FURNITURE FACTORY & SHOWROOM

- Historical Significance

A former artisan producing hand-crafted furniture, the cabinetmaker (in competition with factories) turns to retailing manufactured goods in addition to cabinets and coffins.

- Physical Requirements

Existing building will be converted and updated for period. New storefront windows,machinery and utilities (gas & electric) will be added.

Total Square Feet: 1050SQ. FT.@ \$150 \$157,500



OHIO VILLAGE BUILDING BREAKDOWN

BUILDING

Exhibit Facilities

5. WORKERS HOUSE

- Historical Significance

This house will be the home of husband and wife factory workers and their family. The worker's home will highlight work routines, working class lifestyles, and consumer preferences.

- Physical Requirements

Building will be updated slightly to the period, but still have kerosene lights. Utilities will be added to the building (electric & gas).

Total Square Feet:800 @ \$100

\$80,000

6. POWER PLANT & COAL SHED

- Historical Significant

The power plant was often seen as a symbol of community progress. This site will interpret the technological advances--electric lights, electric motors, and electrical appliances--that altered everyday life, also showing electricity as a product for consumption.

- Physical Requirements

New brick building constructed with the addition of electricity.

Total Square Feet:625 @ \$200

\$125,000



OHIO VILLAGE BUILDING BREAKDOWN

BUILDING **Exhibit** **Facilities**

7. LIVERY,BUGGY STATION & BLACKSMITH

- Historical Significance

Shows the importance of horse-drawn transportation to a community at the turn of the century.

- Physical Requirements

Addition to the existing Blacksmith Shop, convert the barn into a Livery Building and construct a Buggy Shed. Utilities will be added to the Blacksmith Building (Water & Electric).

TOTAL SQUARE FEET

(3 BLDGS.): 1525 @ \$100 \$152,500

8. FACTORY

- Historical Significance

The factory demonstrates the application of technology to the workplace, new methods of mechanization and production, and changes in the work routine.

- Physical Requirements

Construction of a new brick building with utilities (electric & gas)

Total Square Feet:2000 @ \$150 \$300,000



OHIO VILLAGE BUILDING BREAKDOWN

BUILDING

Exhibit Facilities

9. COMMERCIAL BLOCK

- Historical Significance

The town's identity was defined in the facade of its commercial district. The Buckeye Block, in which the lower stories are reserved for public, commercial use while the upper story remains private, houses some of the most prominent businesses of the town.

- Physical Requirements

Two story building to be constructed on the lot left by the relocated Pharmacy. The building will house a variety of businesses, (Bank, Newspaper, Tailor, Leather Goods, Barber and Phone Systems) it will also have an orientation/gathering space and public restrooms.

Total Square Feet

(2 Floors): 7200 @ \$200

\$1,440,000

10. POOL HALL/SALOON

- Historical Significance

Numerous saloons existed in Ohio towns. Although considered by some as social centers of entertainment and camaraderie, saloons were seen by others as a dimly lit dens of evil. The saloon offers insight into working class culture and the demands--through religion and politics--for temperance reform.



OHIO VILLAGE BUILDING BREAKDOWN

BUILDING	Exhibit	Facilities
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(Saloon Cont.)

- Physical Requirements

The current Print Shop building will be relocated to this location with the addition of a front porch and siding. The interior will be converted into a pool hall/saloon. All utilities will be required (gas, electric & water).

Total Square Feet:1000 @ \$100		\$100,000
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11. JEWELER

- Historical Significance

As mass-produced, lower cost watches and jewelry replaced the crafted work of gold and silversmiths, jewelers sold an expanded line of goods (crystal, china, and clocks) and resorted to watch repair and eyeglass fitting.

- Physical Requirements

The current bank building will be converted into a jewelers shop. This will require the interior to be updated to a retail space of the period along with the addition of utilities (electric and gas).

Total Square Feet:700 @ \$200		\$140,000
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OHIO VILLAGE BUILDING BREAKDOWN

BUILDING

Exhibit Facilities

12. CONFECTIONERY SHOP

- Historical Significance

Confectioneries sold a variety of products and often doubled as ice-cream parlors. They were respectable establishments where women could enter unescorted, maintaining the "highest standards of decorum."

- Physical Requirements

The current Tin Shop will be converted into a confectionery shop. This will require interior upgrades along with the addition of utilities (gas, electric & water) and a kitchen facility.

Total Square Feet :700 @ \$200

\$140,000

13. BICYCLE SHOP

- Historical Significance

In the mid- and late- 1890s, a bicycling craze swept the United States. The popularity of cycling at the time was unsurpassed and stirred the demand for both improved roads and shorter, looser clothing styles for women.



OHIO VILLAGE BUILDING BREAKDOWN

BUILDING	Exhibit	Facilities
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(Bike Shop cont.)

- Physical Requirements

An addition to the existing Tin Shop building will house the Bike Shop. The interior will be a retail space and repair shop.

Total Square Feet @ 1200 @ \$200	\$240,000
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14. MIDDLE CLASS HOME

- Historical Requirements

The middle class lived comfortably, yet cautiously, with separate spheres of appropriate activity for men and women. This home will show the consumption habits, living conditions, and work routines of a middle-class family.

- Physical Requirements

The current farm house will be relocated to this new location and updated to a middle class home of the period. Utilities will be added to the building (gas, electric & water).

Total Square Feet: 1000 @ \$200	\$200,000
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15. INVENTOR'S SHED

- Historical Significance

Shows the inquisitive and practical mind at work, experimenting with electricity, motors, and the application of technology to practical matters.



OHIO VILLAGE BUILDING BREAKDOWN

BUILDING

Exhibit Facilities

(Inventor's Shed cont.)

- Physical Requirements

New building constructed to house inventor's workshop, electricity will be the only utility required.

Total Square Feet: 375 @ \$100

\$37,500

16. UPPER CLASS HOME & CARRIAGE HOUSE

- Historical Significance

The home of a factory owner or bank president, this home will show the prevailing standards of taste and propriety and increased emphasis on comfort and consumption.

- Physical Requirements

Construction of a new two story building and carriage house. The building will have all the interior finishes and amenities of a new home during this period.

Total Square Feet

(including carriage house):2700 @ \$200 \$540,000



OHIO VILLAGE BUILDING BREAKDOWN

BUILDING

Exhibit Facilities

17. COLONEL CRAWFORD INN & THE AMERICAN HOUSE HOTEL

- Historical Significance

The hotel served salesmen, businessmen, traveling performers, and tourists and was a fixture on any Main Street. While railroads made travel safer and more comfortable than stage coaches, hotels and restaurants offered comfort and privacy above the old-time inns.

- Physical Requirements

An addition will be built to the restaurant and the interior design will be in Colonial Revival. The Hotel will be upgraded with interior finishes and amenities of the time.

Total Square Feet :Restaurant 2700

Hotel 2160

Total 4860 @ \$100 \$486,000

18 GENERAL STORE

- Historical Significance

The general store offered a wide variety of products. This site will show the shift from bulk products sold out of barrels to nationally advertised, ready-made, pre-packaged goods available for convenience. Also considered is the challenge to local shopkeepers from mail-order catalogue houses.



OHIO VILLAGE BUILDING BREAKDOWN

BUILDING	Exhibit	Facilities
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(General Store Cont.)

- Physical Requirements

An addition to the existing building with and upgrade the interior, along with new store front windows.

Total Square Feet: 2100 @ \$200		\$420,000
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19. CITY HALL, LIBRARY, OPERA HOUSE & FIRE STATION

- Historical Significance

Many Ohio communities had municipal buildings that combined a variety of functions. The opera house will offer popular entertainment of the period. The fire station/city hall will show the shift toward paid, professional staff for municipal concerns. The library will reveal the emphasis on self-improvement and culture.

- Physical Requirements

Construction of a new building to house four new spaces along with public restrooms.

TOTAL SQUARE FEET:5950 @ \$100		\$600,000
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OHIO VILLAGE BUILDING BREAKDOWN

BUILDING

Exhibit Facilities

20. SCHOOL

- Historical Significance

The enlarged school will show the development of public education for Ohio children, the move toward the standardization of the curriculum, and the shift from one-room schoolhouses to graded classes.

- Physical Requirements

An addition and upgrading to the existing school house along with new utilities to the building (gas, water & electric)

Total Square Feet: 5500 @ \$100 \$550,000

21. FARM

- Historical Significance

Although the urban population increased dramatically by the turn of the century, many Ohioans still lived on farms. Farmers were less isolated and farm wives were acquainted with the current tastes and fashions, if not totally able to share in them. The farm will show work roles, and habits of production and consumption.



OHIO VILLAGE BUILDING BREAKDOWN

BUILDING

Exhibit Facilities

(Farm Cont.)

- Physical Requirements

Construction of a farm house, barn and additional outbuildings. Utilities will be required to the site (gas,electric & water).

Total Square Feet : 2350 @ \$200

\$470,000