

2020-2024 STRATEGIC PLAN

The Center for Wooden Boats



Welcome to CWB,
where history
is in your hands.





MISSION

The Center for Wooden Boats promotes northwest maritime heritage through education, interpretation and hands-on experience in building, maintaining and using small craft.

VISION

The Center for Wooden Boats is a thriving community that creates equitable access to empowering maritime experiences.

VALUES

Hands-on Learning and Craftwork

The Center for Wooden Boats values hands-on learning and the practice of traditional maritime skills.

Access

The Center for Wooden Boats believes the joy of being on the water in boats should be available to all without economic or cultural barriers.

Collaboration

The Center for Wooden Boats promotes teamwork within our own organization and collaborates with partner organizations to provide rewarding learning experiences and to enhance the community.

Empowered Youth

The Center for Wooden Boats believes in empowering youth to reach their full potential by providing challenging learning experiences.

Inclusion

The Center for Wooden Boats promotes a safe and friendly environment where people of all ages, races, genders, ethnicity and incomes can connect with each other and our maritime heritage.

Stewardship

The Center for Wooden Boats values stewardship of the natural environment.

Passion

The Center for Wooden Boats values maritime heritage as an important and exciting story. We believe that boats change lives.

TABLE OF CONTENTS

Executive Summary	.....	5
Organization History	.....	5
Goals & Objectives	.....	6-13
Conclusion	.....	14-15
Methodology & Process	.....	16
S.W.O.T. Analysis	.....	17



EXECUTIVE SUMMARY

The Center for Wooden Boats' (CWB's) 2020-2024 Strategic Plan will ensure that CWB continues its long tradition as a hands-on museum open to everyone. By building community, changing lives, and promoting maritime heritage, CWB keeps wooden boat culture alive thriving.

The opening of the new Wagner Education Center in 2019 puts us in an auspicious position to take advantage of phenomenal growth and change in South Lake Union. The WEC will allow us to add year-round programming, reach new audiences, and deepen connections between our community and the craft and culture of wooden boats. To take advantage of this opportunity, CWB needs to strengthen financial resilience and develop a planned program of maintenance, including restoring its floating facilities, and maintaining its fleet. A key to success in Seattle's changing economy will be to enhance CWB's development capabilities, expanding audiences, building new donor relationships, and strengthening existing ones. This will help create more opportunities for visitors, students, and volunteers to discover connections to wooden boat heritage, culture, and craftwork. As demographics shift, increased focus will ensure inclusive, equitable access to these enriching experiences.

CWB's hallmark will continue to be the opportunity to get involved, to use, maintain and build small craft, and to provide access to the water for all.

ORGANIZATION HISTORY

CWB was established in 1978 by Founding Director Dick Wagner, his wife Colleen, and a group of enthusiasts who believed that wooden boat craft and culture should be preserved. Dick and Colleen started a livery (boat rental) at their houseboat on Lake Union. Others contributed boats, time, and skills, putting volunteerism at the core of CWB. In 1983 CWB moved to Waterway 4 and established the existing floating structures as offices, meeting space, livery, and boat shop. Through the 1980's and into the 2000's CWB grew as a volunteer-driven organization offering an increasing range of activities on and near the water. It opened additional classroom and office space in the nearby former Naval Armory, and began operating livery and youth programs at Cama Beach State Park. Meanwhile South Lake Union was becoming a vibrant growing neighborhood with new types of businesses and institutions moving in.

When the move of the Museum of History and Industry into South Lake Union was announced, and CWB realized it would mean the loss of space it previously occupied, CWB's Board of Trustees and management created a strategic plan to cover the years 2013-2017. Under that plan, CWB began construction of the Wagner Education Center (completed in 2019), enhanced visitor experience, created a professional portfolio of youth and adult programs, expanded the docks, and took on new storage and boat building areas at North Lake Union. This 2020-2024 strategic plan will build on those accomplishments and carry us forward into the next phase of growth.



GOALS & OBJECTIVES 1

Goal 1: Increase CWB's service to our community and South Lake Union.

The opening of the new Wagner Education Center puts us in a position to take advantage of the phenomenal growth and change in the surrounding neighborhood of South Lake Union. This goal positions CWB to understand, adapt, and benefit from changing conditions.

A. Create classes and programs responsive to the interests and schedules of our locality.

Approach:

- Survey residents, businesses, and workers in the SLU area to determine how we can best serve them.
- Create programming responsive to survey results.

Key Metric(s):

- Number of constituents who use new programming.
- Revenue created by that programming.

B. Leverage the new capacities and visibility of the Wagner Education Center to make CWB a key player in the South Lake Union neighborhood.

Approach:

- Undertake a program to market the Wagner Education Center's capabilities for private events and identify opportunities to increase paid public programs.
- Increase revenue by fully using the Wagner Education Center for year-round classes.

Key Metric(s):

- Number of events and classes scheduled and revenue generated.



GOALS & OBJECTIVES 2

Goal 2: Strengthen CWB's Physical and Financial Foundations: build an operating reserve, repair, renovate and update Waterway 4 floating facilities, and maintain and enhance our historic fleet.

This goal recognizes that as we move into the new on-land Wagner Education Center, our historic fleet, and unique Waterway 4 floating facilities remain important and valuable. A planned program of maintenance and repair, and an ongoing operating reserve are needed to counter stresses of time, weather, and water.

Objectives

A. Maintain, renovate, and repair CWB floating facilities: WW4's docks, buildings, and floats.

Approach:

- Assess renovation and maintenance needs to ensure uninterrupted facilities use.
- Establish cost estimates.
- Undertake a fundraising and grant writing program.

Key Metric(s):

- Grant applications submitted, funds raised, facilities available for full use.

B. Increase fleet maintenance and improve balance of fleet composition for maximum use.

Approach:

- Continually evaluate fleet numbers and boat types available and their usability for changing demographics of CWB customers.
- Assess amount and cost of work needed to maintain fleet at current or increased level.
- Assess current staff and volunteer capacity needed for maintaining the fleet, and hire and train as necessary.

Key Metric(s):

- Boats available for current or increased use level.
- Customer satisfaction.

C. Develop and implement an Operating Reserve Policy to fund seasonal variations, unexpected events, and new opportunities.

Approach:

- Perform a detailed assessment of physical assets to determine life-expectancy, and follow by a maintenance and repair schedule and a financial needs budget.
- Fund a reserve by combination of generated budget surpluses, donations, and grants for specific projects.

Key Metric(s):

- Assessment, schedule, and budget completed
- Reserve created and funded.

GOALS & OBJECTIVES 3

Goal 3: Enhance Development. Raise contributed earnings by investing in the cultivation and stewardship of donors, members, and volunteers.

CWB relies on the generous donations of time, money, and in-kind resources from a diverse pool of donors, members, and volunteers. This goal is intended to strengthen those connections and to make these relationships more enduring, and rewarding for everyone.

Objectives

A. Add new members and increase retention of existing members.

Approach:

- Evaluate and update all membership, new donor solicitation material, and communications on an ongoing basis.
- Create new membership stewardship events and integrate membership stewardship activities into current events.

Key Metric(s):

- Trends in # of current (active in the last 18 months) members/donors
- Trends in % donor retention rate

B. Increase contributed earnings through attracting new donors and improving relationships with existing donors.

Approach:

- Invest in stewardship of mid to high-level donors through coordinated and systematic contact and communication efforts of board and staff.
- Create new events for mid to high-level donors.
- Identify strong candidates for new donor cultivation efforts and assign board members to follow up leads.
- Invest in our development team to be commensurate with industry best practices.

Key Metric(s):

- Increase in total # of donors.
- Increase in # of mid-level donors
- Increase in # of high-level donors
- Increase in # of FTEs of development team

C. Increase number and diversity of board members.

Approach:

- Create a board development sub-committee dedicated to this objective.

Key Metric(s):

- Net increase in # of board members



GOALS & OBJECTIVES 4

Goal 4: Expand year-round programming. Fill the Wagner Education Center with new exhibits, classes, and activities.

Through its new indoor classroom and workshop spaces the Wagner Education Center gives us the ability to both do what we have been doing at a larger scale and to expand our programs into the winter season, teaching new and different classes to different demographics.

Objectives

A. Inspire connections with a series of interactive, changing exhibits.

Approach:

- Utilize the Interpretive Master Plan to unify efforts to serve both existing and new users in a manner that complements and enhances existing programs and activities.
- Use outside experts to develop engaging and educational exhibits.
- Make grant applications to appropriate agencies and foundations.

Key Metric(s):

- Execution on Interpretive Master Plan milestones.
- Frequency of changeover in exhibits in both WEC and Boathouse Gallery.
- Customer satisfaction surveys.

B. Expand and enhance lessons and classes offered to attract broader, more diverse participation including teens and families.

Approach:

- Focus on specific audiences such as local high school students, families, new arrivals, and “at risk” demographics by diversifying course options with novice courses and courses for more advanced students.
- Create more scholarships opportunities for “at risk” demographics.
- Support with outreach to boost registration.

Key Metric(s):

- Number of new classes offered.
- Number of registered students in both novice and advanced classes.

C. Offer and fill maritime skills classes such as navigation, boating safety, cruising skills, power boating, and human powered craft.

Approach:

- Survey current audiences to better understand demand and conduct market research on locally offered classes.
 - Identify new audiences.
 - Experiment with offerings from 3rd party instructors, and tune the portfolio based on results.

Key Metric(s):

- Number of classes in new subjects.

GOALS & OBJECTIVES 4 (cont.)

- Number of students registered.
- Number of past students returning for additional classes.
- Program revenue.

D. Increase joint programs and leverage contacts with other 3rd party organizations and individuals.

Approach:

- Identify partner organizations with similar or complementary missions, and jointly explore common programs.
- Utilize community contacts to develop new programming.

Key Metric(s):

- Number of activities and programs managed with partner organizations.
- Number of programs enabled by instructors and coordinators from the regional maritime community and partner organizations.

E. Update the field trip program to support curriculum requirements of public and private schools.

Approach:

- Review current field trip curriculum requirements and revise programs accordingly.

Key Metric(s):

- Increase number of field trips.
- Customer satisfaction surveys of school teachers.



GOALS & OBJECTIVES 5

Goal 5: Expand CWB's audiences. Increase appreciation of maritime heritage in the Pacific Northwest by engaging new audiences and enhancing visitor experience.

The Pacific Northwest's maritime heritage is found in Scandinavian sweeping boats, Native canoes, Alaskan fishing boats, Pocock rowing shells, hydroplanes, ferries, and cargo ships from all over the world. CWB strives to be a place where recent arrivals who have never lived in a coastal city feel as connected to this region's maritime tradition as do the multi-generational local families who come to sail the same boats they have been sailing for generations. This goal focuses CWB's efforts to encourage everyone to actively participate in this region's maritime tradition. Every first-time visitor, no matter how casual and brief their visit, should leave knowing that they can come back and get involved as an active participant in CWB's activities.

Objectives

A. Integrate the Wagner Education Center and Waterway 4 into a seamless, compelling, and interactive environment using signage, exhibits, and activities.

Approach:

- Convene and empower a team of staff to study, plan, and then implement best-practices for museums, adopting those practices as necessary to fit with CWB's scale, resources, and operations.

Key Metric(s):

- Evaluation of CWB's interpretive practices conducted by a qualified third party.

B. Create visitor experiences that emphasize getting on the water, into the boat shop, or into the classroom.

Approach:

- Offer hands-on experiences and exhibits throughout CWB's facilities so that every visitor has a tactile experience of activities such as pulling line through a sheave, tying a knot, or handling a tool.
- Train staff and volunteers to actively encourage visitors to participate rather than spectate.

Key Metric(s):

- Direct observation and counting of visitors engaging with CWB in a physical and interactive way.

C. Enhance the volunteer experience and increase their contribution to CWB.

Approach:

- Overhaul CWB's volunteer program to become a data-driven operation with the objective of matching volunteers' skills and interests with CWB's needs.
- Incorporate volunteer appreciation into major events.

Key Metric(s):

- Year over year comparisons of volunteer hours, conversion ratio of guest to volunteer, overall number of volunteers, volunteer events, and attendance of volunteers at volunteer events.

GOALS & OBJECTIVES 5 (cont.)

D. Expand outreach to under served and marginalized communities.

Approach:

- a. Contact human services organizations to request access to the communities they serve.
- b. Utilize interpersonal networks via Board of Trustees and members.

Key Metric(s):

- c. Number of organizations contacted
- d. Number of scholarships distributed.
- e. Demographic distribution of visitors and other constituencies.





CONCLUSION

With CWB's handsome new Wagner Education Center (WEC) strategically placed on prime Lake Union waterfront, CWB is poised to become a key player in South Lake Union's thriving neighborhood. The WEC's classroom and exhibit space will allow us to increase our audiences in diversity and numbers, and expand our portfolio with new year-round classes, programs, and exhibits. Our new boat shop will enable us to maintain and increase our fleet. At the same time CWB will strengthen its foundation by refurbishing its docks and floating buildings and energizing its volunteers.

To meet the challenge of funding this growth, CWB will focus on enhancing the development process: increasing membership, improving relationships with donors, and increasing the number and diversity of board members.

CWB has provided access to water, boats, education and history without barriers since its inception. Equitable access will remain a core value and focus in coming years.



**THE REAL
POWER OF
CWB IS OUR
DEDICATED
FRIENDS.**

*– Dick Wagner,
Founding Director*

METHODOLOGY & PROCESS

The process of developing the 2020-2024 Strategic Plan began in February 2018 when the CWB Board formed a strategic planning committee with Elsie Hulsizer as chair. The committee met approximately monthly.

The committee conducted a Strengths, Weaknesses, Opportunities, and Threats (SWOT) assessment, reviewed and revised the organization's mission and values, crafted a new vision, and created 5 major goals to make that vision a reality.

Committee members:

- Brandt Faatz, CWB Executive Director
- Elsie Hulsizer, CWB Board Member
- Raz Barnea, CWB Board Member
- Terry Montgomery, CWB Volunteer
- Heron Scott, Virginia V Foundation Executive Director
- Liz Hill, CWB Staff
- Kristen Pederson, CWB Staff
- Melanie Masson, CWB Staff



STRENGTHS, WEAKNESSES, OPPORTUNITIES, THREATS (SWOT) ANALYSIS

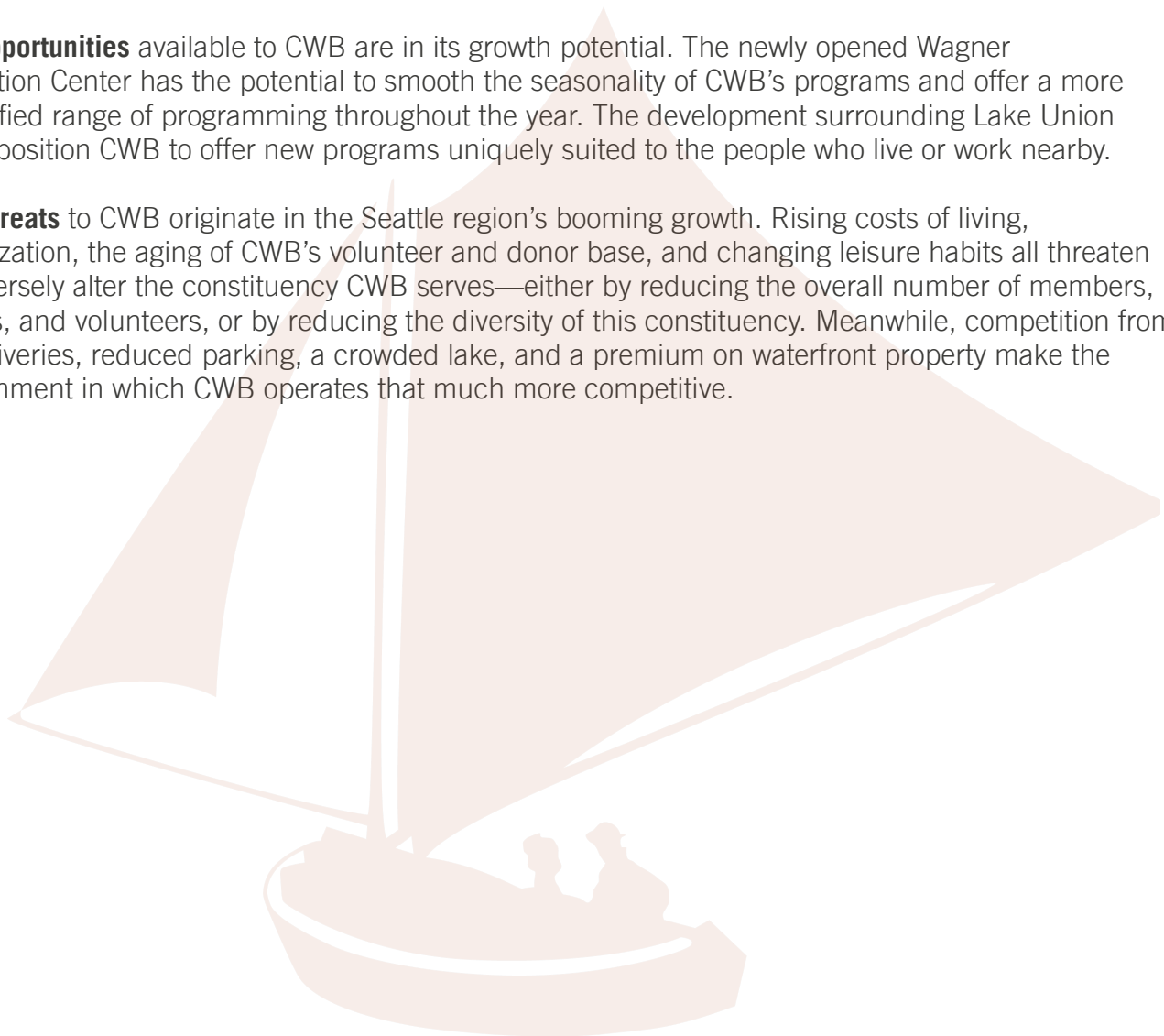
To create the SWOT analysis committee members relied on their own knowledge of CWB and its strengths and challenges plus surveys of a broad cross section of staff, volunteers, donors, and partners. The committee reviewed, revised, and summarized the responses into the following analysis.

The Strengths of CWB is in its people, places, and programs. A consistent theme of the analysis is that CWB comprises a dedicated community with a strong sense of mission and purpose. Another theme is that CWB's unique geography and assets allow it to offer a suite of programs unlike anything else offered in the region. Direct access to Lake Union and Cama Beach allows CWB to operate sailing schools, a working livery, free public boat rides and other on the water programming. Shoreside facilities allow CWB to offer a range of popular indoor programming.

The Weaknesses of CWB are the flip side of its strengths. The variety of programs CWB offers can dilute its message and cause visitors to wonder exactly what CWB does. The heavy use of CWB's facilities and fleet strain its financial resources. The emphasis of on-the-water experience has led to extremely seasonal programming (and therefore revenue) cycle, leading to inconsistent staffing and other operational challenges.

The Opportunities available to CWB are in its growth potential. The newly opened Wagner Education Center has the potential to smooth the seasonality of CWB's programs and offer a more diversified range of programming throughout the year. The development surrounding Lake Union could position CWB to offer new programs uniquely suited to the people who live or work nearby.

The Threats to CWB originate in the Seattle region's booming growth. Rising costs of living, urbanization, the aging of CWB's volunteer and donor base, and changing leisure habits all threaten to adversely alter the constituency CWB serves—either by reducing the overall number of members, donors, and volunteers, or by reducing the diversity of this constituency. Meanwhile, competition from other liveries, reduced parking, a crowded lake, and a premium on waterfront property make the environment in which CWB operates that much more competitive.





THE CENTER FOR WOODEN BOATS

SEATTLE
1010 Valley Street
Seattle, WA 98109

CAMA BEACH STATE PARK
1880 SW Camano Drive
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