

Colorado Chautauqua Association

STRATEGIC PLAN

November 16, 2015

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[to be prepared in 2016]

Introduction

This Strategic Plan is meant to guide future CCA boards of directors and staff and to communicate CCA's sense of strategic priorities to our stakeholders. It is organized around **eight areas of strategic focus**. Some are things already being done or that must be done in the course of our business to maintain and improve our service to the community, our stakeholders, and the ongoing longevity of Chautauqua. Others are things we believe are important to do, including longer-term physical, intellectual, environmental or Chautauqua spirit initiatives. We feel that these eight categories are inclusive of our goals.

Beneath each area of strategic focus are specific strategies to meet our continuing mission and long term vision. Because the strategies are intertwined, some may fit in more than one category. We have tried to organize them logically. We have attempted throughout to remain strategic, leaving tactics and actions to a separate document.

Leading the strategic plan is a section entitled "A View of Chautauqua in 2035." This is not necessarily meant to represent THE vision, but rather a potential vision of Chautauqua in the future. We look 20 years down the road because it is a foreseeable period where many of the goals envisioned in this plan could be achieved and because it corresponds to the duration of CCA's recently-renewed lease with the City of Boulder.

Following the Strategic Plan Overview summary graphic, we have devoted one page to each of the eight areas of strategic focus to provide more detail. This is the meat of the project and important reading. We attempted to make it both brief and informative.

This Strategic Plan is intended to be a living document and to be updated periodically.

Colorado Chautauqua Association

MISSION:

to preserve, perpetuate and improve the site and spirit of the historic Chautauqua by enhancing its community and values through cultural, educational, social and recreational experiences

VALUES:

Lifelong learning, love of nature, voluntary simplicity;
music, oration and the arts;
historic significance, traditions, cultural relevance;
respite and enrichment

Escape - Engage - Elevate

A View of Chautauqua in 2030

Spirit - The camp-like character and sense of community that is a part of Chautauqua's enduring spirit is alive and well. New generations of Chautauquans cherish this reminder of a by-gone time, seeking respite in a serene natural setting, while also celebrating a world of ideas generated at the intellectual crossroads of great literature, the arts, lively civil discourse, and the latest in cultural entertainment.

Heritage - The traditions and multi-generational friendships of the summer community, developed over more than a hundred summers, remain a valued component of Chautauqua's heritage. Cottage owners, long-time renters, and short-term visitors all blend seamlessly into a lively and welcoming community. Children are regularly introduced to Chautauqua's place in Boulder's history through field trips, entertainment, and educational programs, and visitors can tour a pristinely preserved cottage museum.

Resiliency - Chautauqua is physically, environmentally and financially resilient. Careful fiscal planning allows for continuous reinvestment in Chautauqua's historic buildings, beautiful grounds and critical infrastructure. Care is devoted to increasingly sustainable practices, including fire and flood prevention, energy and water conservation, and waste management. Alternative energy sources fuel the cottages and public buildings, most people come to Chautauqua by free and frequent transit, and the pedestrian-friendly grounds are safe, accessible and welcoming to all.

STRATEGIC PLAN OVERVIEW - Areas of Strategic Focus

HISTORIC PRESERVATION

- Preserve and protect the historic character of the buildings and grounds
- Perpetuate the spirit and cultural residency traditions of Chautauqua
- Cultivate visitor awareness of Chautauqua's heritage

EDUCATION AND OUTREACH

- Educate the broader community about the Chautauqua experience
 - commitment to literature and the arts
 - civil discourse
 - cultural heritage
- Seek opportunities to increase diversity of visitors

BUILDINGS and GROUNDS

- Invest in facilities to optimize use
- Invest in and preserve grounds
- Continue to improve infrastructure - Safety, Accessibility, Fire, Flood
- Address access, circulation and parking issues

ENVIRONMENTAL LEADERSHIP

- Implement and share best practices in sustainability across all operations
- Optimize building performance to reduce resource consumption
- Explore opportunities for producing energy
- Adapt in order to maintain resilience in the face of climate change

CULTURAL RELEVANCE

- Provide "only at Chautauqua" year-round experiences
- Create offerings and marketing strategies that align with Chautauqua's unique characteristics
- Compete successfully with other lodging, dining, private event and entertainment venues

OPERATIONAL EXCELLENCE

- Optimize organizational capacity
- Sustain capital and non-capital investments
- Balance use vs. overuse of buildings and grounds
- Implement best practices in sustainability across all operations

FINANCIAL STEWARDSHIP

- Generate adequate revenue to cover:
 - Operating expenses
 - Capital expenditures
 - Other strategic priorities
- Maintain adequate reserves

COMMUNITY PARTNERSHIPS

- Work collaboratively with existing partners to ensure careful stewardship of Chautauqua
- Foster new relationships in support of CCA mission and goals

STRATEGIC FOCUS: HISTORIC PRESERVATION

1. Preserve and protect the historic character of the 67 buildings and 26 acres of historic grounds

- Continue to make external alterations consistent with:
 - *Chautauqua Design Guidelines* (1989)
 - *Chautauqua Park Historic District Cultural Landscape Assessment and Plan* (2004) (“the CLA”)
 - *Chautauqua Landscape Design Guidelines* (2012)
 - *U.S. Secretary of the Interior’s Standards and Guidelines for Treatment of Historic Properties*

2. Perpetuate the spirit and cultural residency traditions of Chautauqua

- Maintain approximate proportion (60:39) of CCA-owned and privately-owned cottages
- Preserve year-round curfew, seasonal quiet hours and seasonal no-construction period to support quiet enjoyment
- Support continued return of long-time guests
- Foster sense of community between newcomers and long-time Chautauquans
- Continue non-summer resident self-programming

3. Cultivate visitor awareness of Chautauqua’s heritage

- improve interpretation of Chautauqua in all venues, grounds, website, social media and publications
- Improve access to archived materials through digitization, web-access, and other modes
- Continue to communicate interpretation opportunities (Exhibits, Self-Guided Tours)
- Establish campus house museum to share the experience of early days at Chautauqua

STRATEGIC FOCUS: EDUCATION AND OUTREACH

- 1. Educate the broader community about the Chautauqua experience – the ongoing commitment to literature and the arts, civil discourse, cultural heritage**
 - Continue to communicate availability of interpretation opportunities (exhibits, self-guided tour, audio tour) and historic walking tours
 - Adapt communications/content to new channels of distribution (i.e. digital)
 - Cultivate new and diverse customers/visitors through use of CCA venues for meetings, retreats, etc.

- 2. Seek opportunities to increase diversity of visitors to Chautauqua**
 - Ensure programming appeals to a diverse range of interests
 - Ensure Chautauqua is welcoming to all
 - Improve accessibility – physical, logistical, transportation, cost
 - Implement outreach program to elementary schools
 - Maintain and promote Columbine Lodge as an affordable lodging option

STRATEGIC FOCUS: BUILDINGS AND GROUNDS

1. Invest in facilities to optimize use in support of CCA strategic objectives

- Relocate maintenance and housekeeping functions to peripheral campus location
- Rehabilitate Primrose building to historic lodging use
- Evaluate future use of Cottage 200
- Maintain Columbine Lodge as affordable lodging option at Chautauqua
- Consider cottage purchase(s) and/or sale/exchange(s) as strategically appropriate while substantially maintaining current balance of CCA and private ownership

2. Invest in and preserve buildings and grounds

- Collaborate with City of Boulder on Sustainable Tree Canopy Program
- Remain Bee-Friendly (neonicotinoid-free)

3. Continue to improve infrastructure

- Safety - implement pedestrian-scale street lighting per Master Exterior Lighting Plan
- Accessibility - continue to enhance ADA accessibility
- Fire - Continue to implement fire mitigation practices, including privately-owned cottages; Underground overhead utilities to prevent wildfire and to restore historic camp-like character
- Flood - improve storm water management, including functionality of historic stone swales

4. Address access, circulation and parking issues

- Collaborate with City of Boulder and other stakeholders to develop, implement and refine over time a Chautauqua Access Management Plan (CAMP) for greater Chautauqua to balance the access of the variety of users and modes while also maintaining the natural, built and historic environments.

STRATEGIC FOCUS: ENVIRONMENTAL LEADERSHIP

- 1. Implement best practices in sustainability of resources across all operations**
 - Exhibit and share best practices in sustainability and preservation
 - Continue Learning Lab - on-site education opportunities, more case studies on CCA website

- 2. Optimize building performance to further reduce resource consumptions**
 - Reduce energy usage while ensuring guest comfort (heating and cooling)
 - Support operational efficiency/staff productivity
 - Energy -
 - Complete transition to more efficient lighting in all buildings
 - Expand best practices in energy reduction to office operations
 - Apply efficiency upgrades to any acquired cottages
 - Water - Evolve with changing water conservation practices in both domestic water and irrigation needs
 - Waste - Persistently enhance outreach/education to guests and staff to support progress toward zero-waste

- 3. Explore Opportunities for producing energy**
 - Support solar farm on Enchanted Mesa Reservoir with CCA as a power purchaser
 - Explore district heating and cooling/split systems (geothermal) to replace current unsustainable cooling approaches
 - Amend Chautauqua Design Guidelines as required to reflect current realities and to enable energy production on campus

- 4. Adapt in order to maintain resilience in the face of climate change**

STRATEGIC FOCUS: CULTURAL RELEVANCE

- 1. Provide “only at Chautauqua” year-round educational, enlightenment and entertainment experiences**
 - Capitalize on Chautauqua’s unique venues to produce multi-level experiences
 - Provide programs that align with the traditional Chautauqua experience
 - Emphasize Chautauqua’s uniqueness
 - Natural beauty and serene setting
 - Historical roots
 - Simple charming accommodations
 - Cultural offerings
 - Respite from technology
 - Sense of community
 - Voluntary simplicity

- 2. Create offerings and marketing strategies that align with Chautauqua’s unique characteristics and mission**

- 3. Compete successfully with local lodging, dining, event and performance venues**
 - Provide high-quality hospitality and programming experiences for core customers
 - Provide diverse offerings to attract new participants, including younger visitors
 - Ensure positive first impressions and reasons to return to Chautauqua again and again

STRATEGIC FOCUS: OPERATIONAL EXCELLENCE

1. **Optimize organizational capacity to achieve mission and goals**
 - Cultivate a culture of operational excellence in all CCA functions
 - Board governance will meet/exceed Colorado Nonprofit Association's *Principles for Nonprofit Excellence in Colorado*
 - Attract, develop and retain outstanding staff, including paying Boulder County living wage
 - Align staff with strategic and operational objectives
 - Provide office space needs and technology to meet operational objectives and support guest experience
 - Enhance guest experience and continue to look for efficiencies in operation of Academic Hall

2. **Actively sustain capital and non-capital investments**
 - Invest in capital improvements that support other strategic goals
 - Maintain schedule of routine capital replacements
 - Invest in non-capital cottage interior improvements (furniture, fixtures, tile, etc.)
 - Continuously repair and maintain facilities and grounds

3. **Balance use vs. overuse of buildings and grounds**

Actively seek ways to reduce impacts of traffic circulation and parking

 - Review and revise *Use Management Policy* as needed
 - Ensure a year-round quality experience of respite and enrichment

4. **Implement best practices in sustainability of resources across all operations.**

STRATEGIC FOCUS: FINANCIAL STEWARDSHIP

1. Manage resources wisely to ensure long-term financial sustainability

- Generate adequate revenue to cover:
 - Operating expenses
 - Capital expenditures
 - Other strategic priorities
- Manage operating and capital costs to reflect budgeted and unexpected expenses
- Comply with Financial Planning and Asset Management Policy regarding financial planning, budgeting, asset management and protection, and internal controls
- Actively oversee CCA's Investment Management Policy and associated investments
- Maintain Scientific and Cultural Facilities District (SCFD) Tier II eligibility

2. Maintain adequate reserves

- Support planned long-term capital improvements, including infrastructure
- Fund strategic opportunities and key strategic planning initiatives
- Hedge against prolonged economic downturns
- Hedge against operational disruptions not covered by insurance (e.g., future major infrastructure projects)

STRATEGIC FOCUS: COMMUNITY PARTNERSHIPS

1. Work collaboratively with existing partners to ensure mutually beneficial objectives

- Boulder community
- City of Boulder
- Colorado Music Festival
- Scientific and Cultural Facilities District (SCFD)
- Cottage owners
- Preservation communities
- Educational and arts organizations
- Sustainability organizations

2. Actively foster new relationships in support of CCA mission/goals

- Strategic outreach to targeted organizations - e.g., Boulder Chamber. Active Boulder industry group, Partners for a Clean Environment (PACE)
- Use CCA venues to increase target market visibility
- Use CCA venues to meet outreach goals

BUDGET IMPLICATIONS

Many of the Strategic Plan elements will be covered in the annual operating budgets and the Five-year Capital Improvements Plan (CIP). Some of the Strategic Plan elements will require additional expenditure beyond current levels of investment.

- **Historic Preservation:** Capital and/or operating expenses for house museum structural support/restoration and operations
- **Education and Outreach:** Depends on actions
- **Buildings and Grounds:** Significant in some cases
 - Increased operational expenses depend on actions
 - Capital expenses per Five-year Capital Improvements Plan (CIP)
- **Environmental Leadership:** Depends on actions
- **Cultural Relevance:** Additional expenses may be incurred with optimization of programming.
- **Operational Excellence:**
 - Ongoing improvements are covered within current budget/anticipated 3% increase in revenues and expenditures each year.
 - Additional one-time or ongoing increased operational costs would include optimization of programming, office space, meeting space, increasing staff capacity
- **Financial Stewardship:** Critical throughout
- **Community Partnerships:** Collaborations may allow CCA to leverage dollars to achieve more/better than CCA on its own.