

GREAT SMOKY MOUNTAINS INSTITUTE AT TREMONT

GUIDING PRINCIPLES / STRATEGIC PLAN SUMMARY

REVISED 4/3/08

Executive Summary

The following is a summary of guiding principles and strategies and actions for the future as developed through planning efforts over the last ten years. Those planning efforts include a strategic plan that was developed in fall of 2003 and a facility master plan that was completed in spring of 2002.

Mission

Vision Statement: Great Smoky Mountains Institute enhances people's connection to nature.

Slogan:connecting people and nature.

Mission statement: Great Smoky Mountains Institute provides in-depth experiences through educational programs designed to nurture appreciation of Great Smoky Mountains National Park, celebrate diversity, and foster stewardship.

The Institute will accomplish its mission by doing the following:

- Operate a residential center for providing people with in-depth experiences within Great Smoky Mountains National Park (GSMNP) that educate users about its ecosystems and the issues that face them.
- Provide training opportunities for, and assist in networking for those who are interested in interpretive and environmental education methods.
- Programs will serve a diverse population of users including the following: (in order of priority)
 - School age children of the region
 - Educators and college students interested in environmental education methods and natural and cultural history of GSMNP.
 - Other adults with interest in developing skills to allow them to better appreciate the natural and cultural resources of GSMNP.
 - Groups interested in utilizing the facilities to conduct a program within GSMNP. Priority will be given to groups with at least a 30% of their program that relates to environmental education or GSMNP issues. Other groups may be considered on a space available basis.

Objectives

- The Institute staff will work closely with the Great Smoky Mountains National Park (GSMNP) Resource Education division to implement the best possible programs that are appropriate to the themes, and issues of GSMNP.
- The total program and operation at the Institute should not only meet but exceed the standards and common peer practices within the field of Residential Outdoor Environmental Education.

- Participants in GSMI programs will develop and demonstrate a greater understanding and appreciation of GSMNP through high quality in-depth learning experiences. Those lessons should be extended and applied to the participant's home communities.
- The Institute will operate as much as possible on a self-sustaining basis. Revenue from programs and visitor center sales should cover most of the operating expenses, routine maintenance and repair. Additional funding will be sought in coordination with the Friends of GSMNP and GSMA to supplement the operational budget, provide for scholarships through an endowment and for special projects and initiatives.
- Program costs should be kept affordable and yet produce the necessary revenue to maintain a high quality program, operation and facilities.
- Expansion of programs and facilities will allow for managed growth that will enhance the quality of the experience and efficiency of use for any user group. Planning for minimal impact upon the resource is of prime importance.
- Facilities should be maintained and operations conducted in ways appropriate for an environmental education center within a National Park. Energy efficiency, waste reduction and other examples of resource preservation and stewardship should be modeled.
- Safety for all participants, employees, and visitors should be a first priority.
- Staff should be well qualified and provided with the necessary training and resources to do their job well.

Values & Beliefs

Developed by staff, board and partners and approved 7/8/04

We believe....that concepts and lessons gained during the Tremont experience should foster an appreciation and respect toward the environment that is transferable to an individual's home place and self.

We value....teaching people to truly appreciate and love the Great Smoky Mountains and encouraging them to work to preserve it and places like it.

We believe.... in using challenging, hands-on activities in our lessons to accomplish what is not possible in the formal classroom.

We value.... teaching that the Smokies is a unique, diverse, and beautiful place.

We believe....that residential, experiential environmental education is not an end in itself, but an opportunity for individuals to develop a different and broadened perspective in their relationship to the world around them.

We value...being a professional, honest, safe, and accessible organization so what we provide to participants will reflect the best methods in the field of environmental education.

We value...being a part of Great Smoky Mountains National Park and sharing in its mission to preserve and provide for its enjoyment.

We believe...that providing opportunities for scientific exploration to our participants is an essential part of our program.

We believe...it is essential to maintain consistency in our values and program delivery and that our organization as a whole should strive to demonstrate what we teach and believe.

We believe....environmental education is an essential part of life-long learning

Keys to Success

The following factors are critical to our success in accomplishing our mission.

- **Product quality:** Our programs and operation are innovative and reflect excellence and follow the best methods and practices.
- **A professional and dedicated staff:** Personnel who are committed to our mission, well trained, enthusiastic, creative and remain well informed about current trends are essential.
- **GSMNP partnership:** Cooperation and integration with GSMNP and its staff is a high priority. Great Smoky Mountains National Park is the focus of our work.
- **Responsible management:** GSMI is managed in an efficient and fiscally responsible manner.

Strategic direction

The following are the top five vision statements developed at our 2003 strategic planning retreat in answer to the question of where we wanted GSMIT to be in the next 5-7 years. (**by 2008-10**) These vision statements and strategies are highlighted in appropriate sections of this plan.

- **Implement a sustainable financial strategy**
- **Complete the planning process and build a site and facility that is a model of sustainable design, practice, and instruction**
- **Continue to develop and implement relevant, cutting- edge, excellent programming.**
- **Implement short-term and long-term strategies to recruit and maintain the highest quality staff.**
- **Develop and maintain a system to determine the impact of its programs on its participants.**

Financial

Strategic plan vision statement: Implement a sustainable financial strategy

Strategy: Develop a balance of income from revenues and fundraising at a ratio of approximately 70-75% revenues and 20-25% fundraising

actions

- *Work toward board, park, partner agreement and commitment to this mix*
- *Continue to seek to improve revenue streams to meet the 70-75% goal*
- *Develop a plan to raise the needed 20-25% yearly.*
- *Develop and implement Friends membership group*
- *Build capacity to accept online donations*
- *Actively seek and write grants for program and scholarship funding*
- *Continue to seek ways to cut costs and build efficiencies within the operation.*

Strategy: Increase emergency reserve funds, establish a capital reserve fund and increase endowment to support both scholarships and operations.

GSMIT adopted the following policy for operating reserves –

POLICY: To establish an operating reserve goal equal to three months operating expenses of the Institute. As funds become available, the Institute will transfer funds to this reserve account until the goal is achieved.

GSMIT adopted the following policy for endowment payouts –

POLICY: The lowest market value in the last 12 quarters multiplied by the following percentages determines the annual payout distribution for the endowment:

ENDOWMENT VALUE UP TO \$2.5 MILLION

Designated for scholarship – 3.5%

Undesignated funds – 0%

actions

- *If operational revenues exceed the 70% goal for the year, allow the balance to be distributed to build emergency reserves to \$250,000 and the capital reserves to \$100,000 – PER BOARD APPROVAL*
- *Develop plan and strategy to increase endowment to \$5 million.*
 - In 2006 – Endowment increased from \$768,263 to \$870,488*
 - In 2007 – Endowment goal from \$870,488 to \$1,320,000*

Facilities

Strategic plan vision statement: Complete the planning process and build a site and facility that is a model of sustainable design, practice, and instruction

Undeveloping Tremont – site and facility master planning

In May of 2002, GSMIT completed a two year process of creating a new master plan for the site and facilities at Tremont. Barge Wagoner Sumner and Cannon Inc. created the plan through a process that involved GSMIT board and staff, NPS staff, partners and focus groups with stakeholders. Initial cost estimates for the project were \$16 million. The goal of this project is to re-design our site and facilities to meet the following objectives:

- Create the appropriate design and features for a world-class residential learning center within our most visited National Park.
- Match excellent programs with an excellent facility.
- Enhance park learning opportunities rather than distract from them.
- Foster sense of place with visitors.
- Create greater flexibility for serving varied user groups.
- Provide a premier site for meetings regarding parks and environmental education.
- Maximize the opportunity of living in facilities inside a National Park for several days to teach about the Great Smokies and sustainability.
- Enhance abilities to serve the local community and foster partnerships.
- Minimize our impact by creating both a site and facility that are models of sustainable design practices.

Strategy: Develop a fund raising Plan

actions

- *Determine what constitutes matching funds and develop a strategy to allocate and or secure funds to make the federal funds available and move the planning process forward.*
- *Determine what level of priority the park has for this project.*
- *Determine how timing of fundraising for construction relates to the planning process.*
- *Put together structure and people to conduct private fundraising.*
- *Work to negotiate the renewal of our agreement with the park for longer than the previous 5 years. This will be critical should if we need to seek private funds for this project.*
- *Continue relationships with corporate environmental managers (CEM)*
- *Write/distribute funding proposal to CEM*

Strategy: Complete all processes that result in NPS approval

actions

- *Encourage NPS to complete the EA as quickly as possible*
- *Continue to build support in congress and the local community for this project*
- *Identify potential negative forces and conduct key meetings*

Strategy: Attain/Retain NPS Superintendent leadership.

actions

- *We need a solid understanding of the Park's level of commitment to this project and the vision we have worked to develop*
- *We need a realistic idea of the feasibility of securing federal and or private funds for this project*

Strategy: Develop a plan to improve current facilities and support services at a "best possible" level until new facilities are built.

actions

- *Develop a realistic idea concerning the feasibility of a new facility and a related time horizon for completing it*
- *Develop a plan for maintaining current facilities and meeting growing needs.*

Critical immediate facility needs:

- Increased office space
- Expanded and enhanced space for science lab and classroom (Alcoa proposal)
- Consider feasibility of added bathroom space in dorm to increase flexibility
- Replace soffit and gutters on staff apartment
- Replace bathroom and kitchen fixtures in staff house
- Remodel bathrooms in activity center and make handicap accessible
- Improve shower facilities for Archaeology field school and tent platforms
- Create maps that can be used for displays and with younger kids

Programming

Strategic plan vision statement: Continue to develop and implement relevant, cutting-edge, excellent programming.

Strategy: Develop a new and/or revise existing curriculum that uses effective educational techniques targeted at our key audiences.

actions

- *Write, integrate and implement science initiatives for elementary, high school, college and adult participants.*
- *Review lessons one at a time, adding relevant activities for older students (7th, 8th, HS) and revising as needed for younger students and update elementary curriculum to reflect current teaching practices*
- *Integrate arts further into current curriculum*

Strategy: Develop and implement a program management plan.

actions

- *Complete initial writing process.*
- *Review and approval by GSMIT staff.*
- *Review and approval by NPS staff.*

Strategy: Assess relationship and programming with other organizations.

actions

- *Compile list of organizations with which we are currently partnering to produce programs.*
- *Compile list of organizations we don't currently partner with.*
- *Research possible partners that we want to target.*

- Propose and develop programming partnerships with other agencies.

Strategy: Evaluate effectiveness of various programs and target groups and determine appropriate program mix and related marketing strategy.

actions

- *Develop marketing methods for regional and national markets.*
- *Develop marketing/PR plan per program to include:*
 - *Calendar listings in media (magazines, newspapers, websites)*
 - *Register new press release*
 - *Final registration press release*
 - *Placing feature stories*
- *Utilize e-mail marketing to remind past attendees to consider GSMIT again this year*
- *Build relationships with magazines to seek advertising trades*
- *Identify additional creative program topics.*
- *Build on Arts initiative Citizen Science efforts*
- *Develop long-term plan for planning and funding of teacher training week (Smoky Mountain Science Teacher Institute).*
- *Continue to develop relationships with additional colleges and universities in order to grow this aspect of our program. (Concern: That we have enough qualified staff to teach this group.)*
- *Consider the feasibility of creating a graduate level professional residency program or other cooperative program with University partners.*
- *Continue to identify year round schools and target recruitment effort toward them*
- *Continue to identify and develop partnerships with groups that recruit participants for a program at Tremont*

Staffing

Strategic plan vision statement: Implement short-term and long-term strategies to recruit and maintain the highest quality staff.

actions:

- *Review salary survey (compare local rates)*
- *Review and rewrite job descriptions*
- *Review staff structures by division*
- *Create a yearly professional development plan*
- *Develop partnerships with organizations that can deliver high quality staff*
- *Research feasibility of some kind of graduate program*
- *Update Employee Manual*

Program Impact

Strategic plan vision statement: Develop and maintain a system to determine the impact of its programs on its participants

Strategy: Develop and maintain a system to determine the impact of its programs on its participants.

actions

- *Further implementation of surveys of teachers and students pre, post, 3 months post and teacher interviews*
- *Staff to become familiar with software, input of data and creation of reports*
- *Write journal articles once data is available to share with the greater EE community*