

Wormsloe State Historic Site Business & Management Plan

Prepared June 2011; Finalized December 2012

Direction 2015 – Sustainable Business Planning

Table of Contents

Executive Summary	3
Site and Operations Assessment	7
Site Inventory and Facility Assessment.....	7
Operational Assessment.....	9
Financial Performance Assessment	14
Business and Management Plan.....	17
Business Goals	17
Classification of Programs and Services.....	18
Partnership Development Plan.....	19
Marketing and Sales Plan.....	20
Revenue Generation Plan	22
Expense Management Plan	23
Financial Pro Forma	24
Action Plan.....	26

Executive Summary

The Parks, Recreation and Historic Sites Division (PRHSD) of the Georgia Department of Natural Resources (DNR) is transitioning the management of Wormsloe State Historic Site to operate more like a business, reflecting the Direction 2015 – Sustainable Business Planning initiative to improve the fiscal performance and management of the state parks and historic sites system. This business and management plan is designed to help the site recover more operating expenses through earned revenues, productive partnerships, and innovative programs.

Site Fact Sheet

Site Name	Wormsloe State Historic Site
Site Manager	Chris Floyd
Region Manager	Tommy Turk
Date of Business Plan completion	February 24, 2012
Site size	1,233 acres
Total number of visitors (FY 2010)	28,288
Total operating budget (FY 2010)	\$263,974
Total earned revenues (FY 2010)	\$165,378
Operational cost recovery (FY 2010)	63%
Average operating cost per visitor (FY 2010)	\$9.33
Average earned revenue per visitor (FY 2010)	\$5.84
Average cost recovery ¹ (FY 2008 – 2010)	49%
Target cost recovery (FY 2015)	97%
Total full-time employees ²	4
Total part-time employees ³	4
Primary service markets ⁴	Savannah, Jacksonville, Hilton Head, Charleston
Primary attractors/visitor appeal factors	Live Oak Allee, Tabby Ruins from 1737, Colonial Life Area, Museum/Film, Trails, View sheds of Allee, Jones' Narrows, Moon River, Ranger led programs and demonstrations.
Leading opportunities for improved site performance	Addition of historic reconstructions of original structures and expanding living history programs to give a more hands-on, interactive experience.

¹ This is the average of the last three years – FY 2008, FY 2009, and FY 2010

² Current employees, not including vacancies.

³ Current employees, not including vacancies.

⁴ Major population centers within a two-hour drive from the site

Site Summary and Key Attractions

Comprising 1,233 acres on Long Island, Pigeon Island, and the southern half of Isle of Hope, Wormsloe State Historic Site is located in an urban residential setting eight miles from Historic Downtown Savannah. It is located 17 miles from Interstate 95, and 15 miles from Interstate 16. The historic and cultural tourism industry of Savannah and the relative proximity to I-95 bring the site the bulk of its visitation. Over six million visitors come to Savannah every year, yet only a tiny fraction visit Wormsloe. Tapping into this market could provide a huge boost to the site's visitation and revenue. Improved marketing, programming, and package promotions are needed accordingly. For visitors seeking cultural/historical sites, "Colonial Wormsloe" occupies a unique niche as the only colonial-era historic site open to the public in Savannah and serves as a counter balance to the numerous antebellum and Civil War-era attractions in the area.

Key Attractions

The amenities or features listed below are those that seem to be most popular for visitors.

- Live Oak Allee
- Visitor Center (Theater, Museum, Gift Shop)
- Tabby Ruins from 1730s
- Colonial Life Area
- Trails

Financial Targets

The table below details the total operating expenses and earned revenues for Wormsloe over the last three years (2008 – 2010). This table also calculates total cost per visitor and revenues per visitor during these operating years, and details the target financial performance goals in the context of achieving at least 80% cost recovery. This table also calculates the necessary change from 2010 operating expenses and revenues.

Wormsloe State Historic Site	Target Visitation Growth from 2010	Target Change in Visitation		
Visitation Assumptions	20%	5,658		
	2008	2009	2010	2015 Target
Visitors	23,000	23,825	28,288	35,000
Total Expenses	\$ 287,067	\$ 207,332	\$ 263,974	\$ 290,000
Total Revenues	\$ 100,829	\$ 104,482	\$ 165,378	\$ 280,500
Cost per Visitor	\$ 12.48	\$ 8.70	\$ 9.33	\$ 8.29
Revenue per Visitor	\$ 4.38	\$ 4.39	\$ 5.85	\$ 8.01
State Financial Support per Visitor	\$ (8.10)	\$ (4.32)	\$ (3.49)	\$ (0.27)
Total Cost Recovery	35%	50%	63%	97%
Change from 2010 Expenses			\$ 26,026	
Percent Change from 2010 Expenses			9.86%	
Change from 2010 Revenues			\$ 115,122	
Percent Change from 2010 Revenues			69.61%	

Key Recommendations

Primary / Short Term Recommendations

1. Focus the regular operation of the site on providing interpretive programs to attract and retain visitors (in the absence of “park-style” revenue generating facilities). Enhance facilities and program offerings accordingly to provide high-quality interpretive services during all hours of operation.
2. Create a site-specific interpretive programming manual and other tools that will assist in training new employees and volunteers to provide high quality interpretive programs.
3. Offer a minimum of six special events annually to help draw more visitors to the site.
4. Collect a statistically valid sample of ZIP code data from visitors in a non-intrusive way to gauge their origins and demographics (e.g., age, ethnicity, income, etc.) and use the results to improve programming and marketing efforts.
5. Conduct in-park surveys regularly to assess customer service. Wormsloe’s goal will be to have 90% of visitors responding to ‘Comment Cards’ reporting that they were either ‘satisfied’ or ‘very satisfied’ (or some comparable metric to be developed in the new online comment system).
6. Partner with the Savannah CVB, the Savannah Chamber of Commerce, and other destination marketing organizations to promote the site.
7. Engage the Friends of Wormsloe in the business plan as a partner to help the site meet or exceed its sustainability goals. Continue to work with Friends to help raise funds and recruit volunteers for programming and improvement projects.
8. Add more programs, special events, and educational opportunities that appeal to elementary, middle, and high school students. Develop relationships and lines of communication with area school teachers and administrators. Actively promote the site to schools in the Savannah area, as well as Macon/Warner Robins, metropolitan Atlanta, and the I-95 corridor.
9. Manage Wormsloe according to well-defined maintenance, program, and operational standards supervised by region managers and senior management.
10. Work with the Wormsloe Foundation to find areas of collaboration in regard to resource management and research.
11. Renovate the museum with new exhibits and interactive displays.
12. Market Wormsloe as a wedding ceremony and photography location, but within the limits of the operation. Offer wedding packages in cooperation with Skidaway Island State Park.

Secondary / Long Term Recommendations

1. Rebrand the site to focus on the “colonial” aspect of interpretation and programs to make it distinct from other competing historic sites in the Savannah area.
2. Perform a thorough net cost of service analysis on major functions of site operations, including a detailed analysis of labor requirements by task. Thereafter, update costs to deliver services on

an annual schedule. Develop a more detailed analysis of labor requirements of all major site functions to match the right position with the right job at the right pay.

3. Market and sell site-specific retail merchandise online.
4. Review and update the rates at the site level on an annual basis. Offer premium interpretive programs with higher fees outside normal hours of operation.
5. Track total economic impact of the site in the local communities and region and share with decision-makers, elected officials, local business operators, and others to demonstrate the impact of Wormsloe.
6. Develop a detailed set of lesson plans and other educational materials to provide educators with tools to enhance the educational value of their experiences at Wormsloe.
7. Combine efforts with other parks and historic sites in the area and along the coast (public and private) to develop package deals and other promotions. For example, create and promote a Skidaway/Wormsloe offer to include both camping and historic site admission.
8. Encourage the development of innovative interpretive programs that bring new visitors to the site, particularly those from groups who are typically underrepresented among the site's visitors.
9. Invest in the interpretive infrastructure of the site, including a re-creation of Noble Jones' fortified house, a new museum, an outdoor shelter (for group programs and day use), and the purchase or construction of a scout boat similar to what Capt. Noble Jones' marines used at Wormsloe in the 1740s (Ft. King George SHS has one already). The goal is to secure Wormsloe's place as the premiere colonial historic site in the Savannah area and provide visitor experiences accordingly.

Site and Operations Assessment

This site and operations assessment is a culmination of analyses and findings from a review of the condition of facilities, infrastructure, and operations at Wormsloe. The findings and observations are not intended to be an exhaustive review of all issues present, but provide a basic understanding of the predominant issues that contribute to the site's current operating conditions. The assessment includes the following:

1. Site Inventory and Facility Assessment
2. Operational Assessment
3. Financial Assessment

Site Inventory and Facility Assessment

Methodology

Facility and asset conditions are rated using a differential scale of excellent, good, fair, or poor. Descriptions of conditions that are attributed to each of these findings are also provided.

Scale of Conditions	
Rating	General Description
Excellent	Facilities/amenities are in 'excellent' condition when they show little or no maintenance or repair problems. Facilities do not feature any major design or operational issues or flaws that contribute to diminished use or increased maintenance or upkeep. Facilities are easy to clean and maintain in order to place them back into public use and the users perceive them to be in excellent shape.
Good	Facilities/amenities are in 'good' condition when they show only minor maintenance or repair problems. Most maintenance issues with these facilities typically appear to be the result of age and/or heavy use. Facilities may only feature minor design or operational issues that contribute to diminished use or increased maintenance or upkeep. Facilities are moderately easy to clean and maintain in order to place them back into service and the users perceive them to be adequate for their use, but probably not in excellent shape.
Fair	Facilities/amenities are in 'fair' condition when they show significant maintenance or repair problems. Facilities generally exhibit ongoing maintenance issues that appear to be the result of age, heavy use, or design or operational flaws. Some maintenance and repair needs may compound their fair condition by being deferred because of budget and/or resource limitations. Facilities require more effort to clean and maintain before placing them back into service and the users may perceive them as being less than adequate for their use and in a state of deterioration. The facility or structure may need of major repair or replacement.
Poor	Facilities/amenities are in 'poor' condition when they show significant, on-going maintenance or repair problems that ultimately may result in suspended use for repair/replacement. Maintenance and repair issues are possibly the result of poor maintenance and clearly the result of age, heavy use, or design or operational flaws. Problems with the facilities are often compounded over time due to consistently-deferred maintenance and repair because of budget and/or resource limitations. Facilities may feature major design or operational issues that contribute to diminished use or increased maintenance or upkeep. Facilities require excessive effort to clean and maintain before placing them back into service and the users often perceive them as being inadequate for their use and in a state of serious deterioration. The facility or structure may need of major repair or replacement.

Inventory and Assessment

The table below is an inventory of facilities and amenities at Wormsloe, and provides the assessed condition of each as reviewed in June 2011.

Site Asset / Amenity	Quantity	Condition
Total acreage	1,233	Good
Visitor Center/Museum	1	Good/Fair
Maintenance Shop	1	Fair
Manager's Residence	1	Good
Gate Cottage	1	Fair
5 miles of Trails	1	Good
Oak Allee	1	Good
Parking Areas	2	Good
Picnic Area	1	Fair
Tabby Ruins	1	Fair

Prioritized Facility Needs

Based on the facility inventory and assessment, these prioritized needs have been identified. Each need has been aligned with a priority category of high, moderate, or low to support future decision making regarding project sequencing, investment of public resources, and meeting community expectations. **The priority assignment for each need is not a measure of importance.** Rather, these recommended priorities reflect a phased implementation approach over the next several years.

Facility Need	Priority Assignment
New exhibits in museum	High
Outdoor covered shelter and improved picnic area (drain field also)	High
Black powder storage building	High
Paint and replace some exterior boards/siding on all facilities	High
Surfacing for trails around tabby ruins and bluff	High
Oak Tree Maintenance on Allee	High
Replace some siding on front gate cottage	High
Install campground host site with water, power, septic	High
Replace culverts and clear drainage ditches	Moderate
Improve parking areas, especially at front gate	Low
Line the entire oak allee with a border to protect trees from car traffic	Moderate
Additional crush and run for oak allee	Moderate
Additional fill dirt or mulch for back trails	Moderate
New roof and re-wiring at maintenance shop	Low
Tabby Ruins long-term preservation plan	Low
Dirt for picnic area; sits on top of drain field and is eroding	Low
New Visitor Center and Museum Complex	Low
Docks for Jones' Narrows for premium programs (scout boat)	Low

Operational Assessment

The Operational Assessment includes:

1. An inventory and classification of programs and services being provided at the site
2. A review of staffing at the site
3. A review of concessionaires and partners operating at the site
4. Visitation and customer satisfaction

Inventory and Classification of Programs and Services

Programs and services are classified into one of three major categories:

- 1) Core or Essential Services**
- 2) Important Services**
- 3) Visitor Supported Services**

Programs and services at the site are classified into these categories based in part on the mission and public mandates for both the site and the agency. For the programs and services in each of these categories, there are financial performance expectations that will define how services are funded and evaluated.

CATEGORY 1 – CORE SERVICES *[Largely supported by tax funds]*

Core programs, services and facilities are those the agency must provide and/or are essential in order to capably govern and meet statutory requirements. The failure of the agency to provide Category 1 services at adequate levels could result in significant negative consequences for the public and the resources under protection. The criteria for programs or services to be classified as core or essential are:

- The services are mandated by the agency's law or charter or are contractually obligated by agreement to provide the services.
- The services are essential to protecting and supporting the public's health and safety.
- The services protect and maintain valuable assets and infrastructure.
- The services would generally and reasonably be expected and supported by residents, businesses, customers and partners.
- The services are those that cannot or should not be provided by the private sector.
- The services provide a sound investment of public funds.

The following programs and services offered at Wormsloe have been identified as **core services**:

- **Management of cultural and natural resources (mandated by Heritage Trust)**
- **Open public access to the site and its resources (mandated by Heritage Trust)**
- **Maintenance of grounds facilities and infrastructure**
- **Basic educational and interpretive services**

CATEGORY 2 – IMPORTANT SERVICES *[Supported by a balance of tax funds and earned revenues]*

Important programs, services and facilities are those the agency should provide, and are important to governing and effectively serving residents, businesses, customers and partners. Providing Category 2 services expands or enhances the agency's ability to provide and sustain its core services. The criteria for programs or services to be classified as important are:

- The services expand, enhance or support identified core services.
- The services are broadly supported and utilized by the community, and are considered an appropriate, important, and valuable public good. Public support may be conditional upon the manner by which the services are paid for or funded.
- The services generate income or revenue that offsets some or all of the operating cost and/or are deemed to provide economic, social or environmental outcomes or results.

The following programs and services offered at Wormsloe have been identified as **important services**:

- **Trails**
- **Colonial Life Area**
- **School and public tour group programs**

CATEGORY 3 – VISITOR SUPPORTED SERVICES *[Almost exclusively supported by earned revenue]*

Visitor supported programs, services and facilities are those discretionary services that the agency may provide when additional funding or revenue exists to offset the cost of providing those services. Category 3 services provide added value above and beyond what is required or expected. The criteria for programs or services to be classified as visitor supported are:

- The services expand, enhance or support core services or important services and the quality of life of the visitors, community or stakeholders.
- The services are supported, valued and well utilized and provide an appropriate and valuable public benefit.
- The services generate income or funding from sponsorships, grants, user fees or other sources that offset some or all of their cost and/or provides a meaningful return on investment.
- The services can possibly be provided through outsourcing or use of concessionaires, providing opportunities for community enterprises that may not otherwise be provided by the agency.

The following programs and services offered at Wormsloe have been identified as **visitor supported services**:

- **Resale operation**
- **Special events**
- **Daily interpretive programs**

Staffing Assessment

Labor costs at Wormsloe represent the largest area of budgetary expense at an average of 75% of the total operating budget each year for the last three complete years, which is higher than the target of total labor costs (including benefits) not exceeding 65% of the site's total operating expenditures. The tables below and on the following page provide a basic review of the current staffing at the site.

Full Time Equivalent Employees

Position / Title	Quantity (FTE)	Vacancies	Annual Hours
Historic Site Manager	1	0	2400
Interpretive Ranger	1	0	2200
General Trades Craftsman	0	1	0
TOTAL	2	1	4600

Part Time Employees

Position / Title	Quantity (FTE)	Vacancies	Hours
Skilled Trades Worker	1	0	1248
Seasonal Naturalist	1	0	1248
Seasonal Naturalist	1	0	1248
Seasonal Naturalist	1	0	1248
Clerk	1	0	1248
Gate Attendant	1	0	1248
Gate Attendant	1	0	1248
TOTAL	4	0	8736

Labor Support

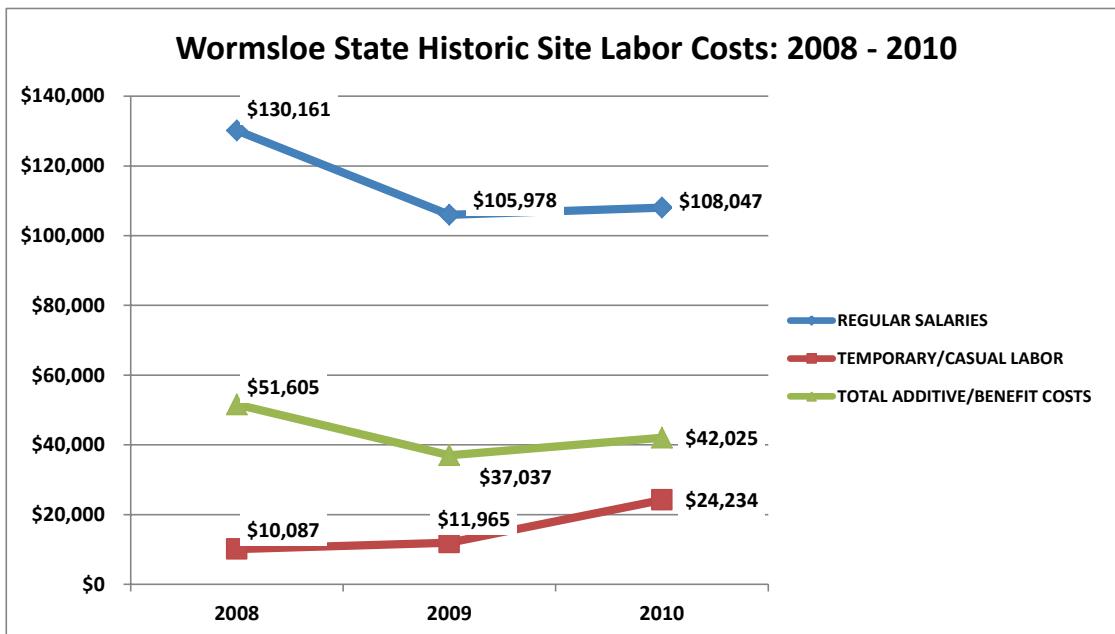
Labor Support	Annual Hours
Volunteers	2500
Community Service Workers	0
Engineering and Construction Crews	0
Resource Management Crews	100
TOTAL	2600

Total Labor Hours

Labor Type	Annual Hours
Full Time Equivalent Employees	4600
Part Time Employees	8736
Labor Support	2600
TOTAL Annual Labor Hours	15936

LABOR BUDGET SUMMARY

Wormsloe State Historic Site Account Code and Sub-Class Expenditure Descriptions	2008 Year End Expenses	2009 Year End Expenses	2010 Year End Expenses	% Change from 2008
REGULAR SALARIES	130,161	105,978	108,047	-17%
ANNUAL LEAVE PAY	1	1	1	0%
OTHER SUPPLEMENTAL	1	3,317	1	0%
TEMPORARY/CASUAL LABOR	10,087	11,965	24,234	140%
FICA	7,500	7,775	7,750	3%
RETIREMENT	14,544	11,033	11,651	-20%
HEALTH INSURANCE	28,851	14,203	22,458	-22%
UNEMPLOYMENT INSURANCE	120	120	164	36%
ASSESSMENTS BY MERIT	588	588	0	-100%
PERSONAL SERVICES	191,853	154,979	174,306	-9%



Visitation

Overall annual visitation to Wormsloe has trended upward from 2008 to 2010, increasing by 23% or over 5,000 visitors. This is largely attributed to growth in Savannah tourism, increased operating hours, and better marketing and programming at the site.

Year	Total Visitation
2008	23,000 (est)
2009	23,825
2010	28,288

Customer Service and Satisfaction

The table below indicates the percentage of comment cards returned that indicate that the visitor was “satisfied” or “very satisfied” with their experience. Note: This data is based on a sample of only 13 returned comment cards.

Site	Year	Customer Satisfaction Level
Wormsloe	2009	100%
	2010	70%

Wormsloe also has a rating of 4.5 out of 5 on the travel website www.tripadvisor.com and similarly high rankings on Google and Yelp.

Financial Performance Assessment

Operational Expenses

A summary of total operating expenses at Wormsloe from 2008 to 2010, as well as their percent change from 2008 are provided in the table below.

Wormsloe State Historic Site	2008	2009	2010	% Change from 2008
Operational Expenses				
REGULAR SALARIES	105,978	105,978	108,047	2%
ANNUAL LEAVE PAY	1	1	1	0%
OTHER SUPPLEMENTAL	1	3,317	1	0%
OVERTIME				
TEMPORARY/CASUAL LABOR	11,965	11,965	24,234	103%
FICA	7,775	7,775	7,750	0%
RETIREMENT	11,033	11,033	11,651	6%
HEALTH INSURANCE	14,203	14,203	22,458	58%
UNEMPLOYMENT INSURANCE	120	120	164	37%
ASSESSMENTS BY MERIT	588	588	1	-100%
DRUG TESTING	0	0	0	
PERSONAL SERVICES	151,663	154,979	174,307	15%
POSTAGE	1	1	53	5170%
MOTOR VEHICLE EXPENSES	2,755	2,755	2,642	-4%
PRINTING & PUBLICATION	1	1	462	46050%
SUPPLIES & MATERIALS	311	311	6,280	1918%
REPAIRS & MAINTENANCE	1,000	1,000	3,582	258%
EQUIPMENT >\$1000< \$5,000				
WATER & SEWAGE	676	676	961	42%
ENERGY	8,816	8,816	7,586	-14%
RENTS	1,621	1,621	1,798	11%
INSURANCE & BONDING	2,057	2,057	1,397	-32%
FREIGHT				
PURCHASING CARD	10,947	10,947	32,609	
OTHER OPERATING EXPENSES	1,877	1,877	2,525	35%
CLAIMS & BONDS & INTEREST	0	0	0	
TRAVEL	1	1	1	0%
REGULAR EXPENSES	30,062	30,062	59,895	99%
MOTOR VEHICLE EQUIPMENT	1	1	1	0%
EQUIPMENT PURCHASES >5000				
CAPITAL\ LEASE Prin & Int				
REAL ESTATE RENTALS				
VOICE/DATA COMMUNICATIONS	1,298	1,298	831	-36%
PER DIEM & FEES				
PER DIEM & FESS EXPENSE				
CONTRACTS	2,825	2,825	4,825	71%
ADVERTISING - PROCUREMENT CARD				
RESALE	18,172	18,172	23,983	32%
TOTAL OTHER EXPENDITURES	22,296	22,296	29,640	33%
GRAND TOTAL	\$ 287,000	\$ 207,337	\$ 263,843	-8%
Earned Revenues	\$ 100,829	\$ 104,482	\$ 165,378	-36%
% Cost Recovery	35%	50%	63%	79%

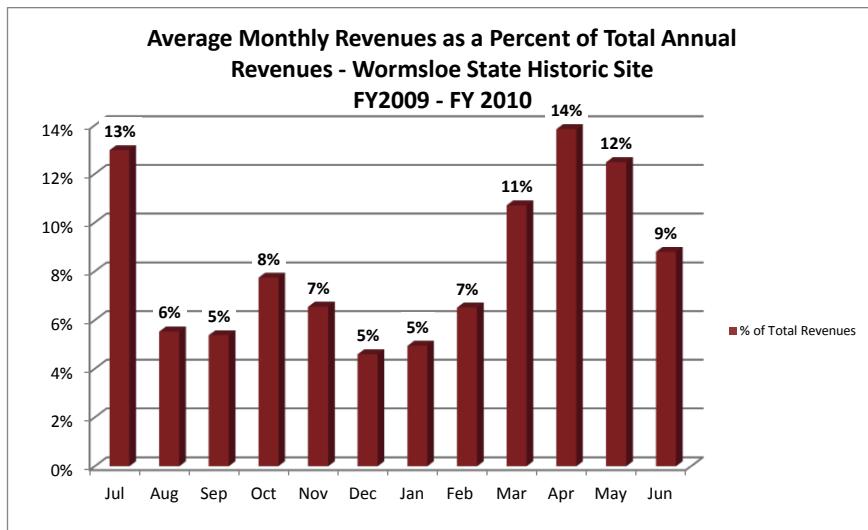
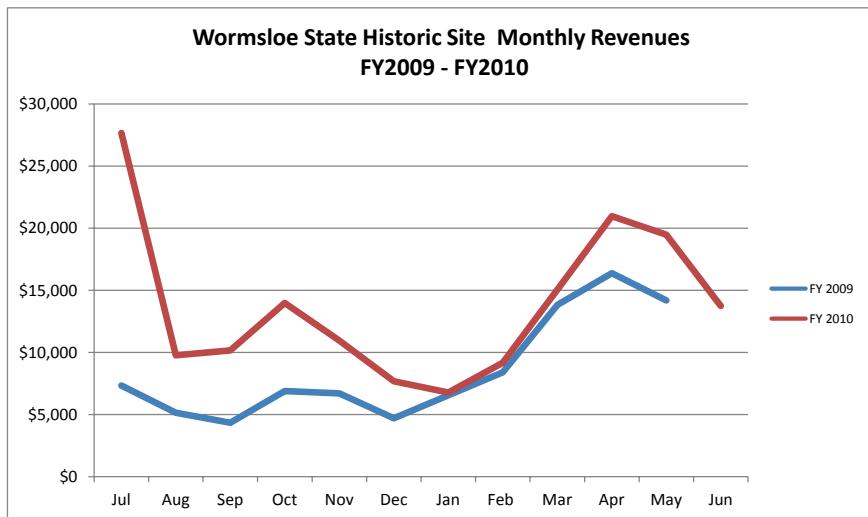
Earned Revenues

Earned revenues at Wormsloe have increased since 2008, which is largely attributed to the corresponding increase in overall visitation.

Monthly earned revenues for the last two years (see table on the following page) indicate that the total annual revenue increased 58% from 2009 to 2010, with significant percentage **increases** in monthly revenues in all months except January, February and March. NOTE: July did see an increase in revenue collections through resale and admissions, but the extremely high number is a result of a one-time payment for a major motion picture filmed on site.

Wormsloe													
FY 2009 - FY 2010 Monthly Revenue													
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
FY 2009	\$7,335	\$5,150	\$4,345	\$6,888	\$6,708	\$4,704	\$6,552	\$8,402	\$13,821	\$16,383	\$14,186	\$10,008	\$104,482
FY 2010	\$27,664	\$9,772	\$10,161	\$13,981	\$10,949	\$7,678	\$6,766	\$9,160	\$15,068	\$20,966	\$19,475	\$13,739	\$165,379
Avg	\$17,500	\$7,461	\$7,253	\$10,435	\$8,829	\$6,191	\$6,659	\$8,781	\$14,445	\$18,675	\$16,831	\$11,874	\$134,931
% of Total Revenues	13%	6%	5%	8%	7%	5%	5%	7%	11%	14%	12%	9%	100%
% change	277%	90%	134%	103%	63%	63%	3%	9%	9%	28%	37%	37%	58%

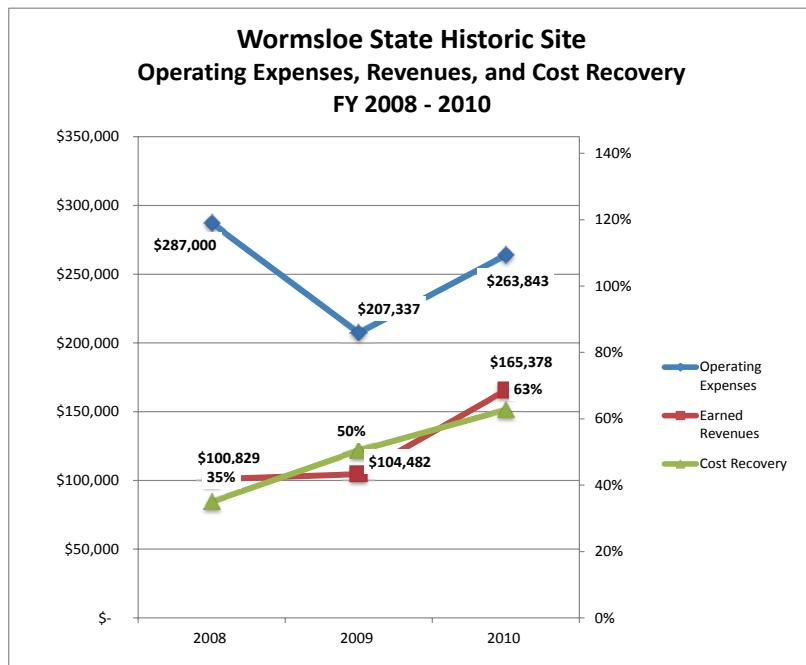
The graphs below illustrate the monthly revenue trends each year and the average percent of total annual revenue earned each month.



Cost Recovery Trends

Wormsloe has achieved an average cost recovery of 49% of annual operational expenses through earned revenues from FY 2008 to FY 2010. This is detailed and illustrated in the table and graph below.

Year	Operational Expenses	Earned Revenues	Percent Cost Recovery
2008	\$287,067	\$100,829	35%
2009	\$207,332	\$104,482	50%
2010	\$263,947	\$165,378	63%



Review of Pricing

Data on rate information is available as far back as 2002, but only the last five years are evaluated. There has been notable growth in fees charged at Wormsloe since 2005, with the largest increase being during the years 2008-2009 and 2010-2011. A table detailing the rates for Wormsloe is provided below.

	2006	2007	2008	2009	2010	2011
HISTORIC SITES						
Wormsloe						
Adults	\$4.00	\$4.00	\$4.00	\$5.00	\$5.00	\$6.00
Seniors	\$3.50	\$3.50	\$3.50	\$4.50	\$4.50	\$5.50
Adult Groups	\$3.00	\$3.00	\$3.00	\$4.00	\$4.00	\$4.00
Youth (6 - 17)	\$2.50	\$2.50	\$2.50	\$3.50	\$3.50	\$3.50
Youth Groups (6 - 17)	\$2.00	\$2.00	\$2.00	\$3.00	\$3.00	\$3.00
Child/Groups (Under 6)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1.00

Business and Management Plan

Business Goals

The following goals serve as the foundation for the key recommendations and strategies in this business plan for Wormsloe.

Enhance Cost Recovery of Site Operations

Wormsloe is currently operating at about 63% cost recovery with 97% being the goal by 2015. The site will achieve this goal through a combination of cost reductions and increased revenues from increased rates and visitation.

Enhance Revenue Generation Strategies

Wormsloe will increase revenue generation by continuing to attract more visitors with its daily programming and special event offerings. More site-specific retail items and those with higher possible markups will be made available for purchase. Schools and public tour groups will be actively targeted.

Expand Special Events at the Site

Wormsloe will endeavor to continue its current special events and seek out new ones to host as well. The goal will be to host at least six special events spaced evenly throughout the year. All new events will be evaluated for cost effectiveness.

Improve the Diversity and Innovation of Recreational and Interpretive Programs

Visitors will have something to see and do at Wormsloe every day as a result of active interpretation and plenty of “ranger contact.” Interpretive staff will implement programs that target non-traditional visitors, such as younger, more racially diverse populations, to the site.

Improve the Effectiveness of Marketing and Sales

Only a small percentage of visitors to Historic Downtown Savannah make it to Wormsloe. Every effort will be made to team up with the Savannah Convention and Visitors Bureau to integrate the site into the marketing plan for the city/region. New advertising opportunities in and around Savannah will be explored.

Establish Greater Consistency of Managing and Monitoring Customer Service & Satisfaction

Routine customer service surveys will be implemented and evaluated to gauge the popularity and effectiveness of programs and facilities.

Expand Partnership Opportunities

Site management will work with the Wormsloe Foundation to protect and enhance the natural and cultural resources at Wormsloe. The staff will also reach out to local schools and offer interpretive services accordingly. We will engage Friends members in the business plan as a partner to help the site meet or exceed its sustainability goals.

Classification of Programs and Services

The tables below summarize the classifications of programs and services at Wormsloe as either core, important, or visitor supported and projects a range of cost recovery percentages that might be achieved for each. These classifications establish financial performance goals for each category of services that are linked to the recommendations and strategies of this business plan.

Core Services	
Program / Service	Target Cost Recovery
Management of cultural and natural resources	0%
Open public access to the site and its resources	75%
Maintenance of grounds, facilities, and infrastructure	0%
Basic educational and interpretive services	100%

Important Services	
Program / Service	Target Cost Recovery
Trails	100%
Colonial Life Area	100%
School and public tour group programs	200%

Visitor Supported	
Program / Service	Target Cost Recovery
Resale Operation	140%
Special Events	100%
Daily Interpretive Programs	125%

Partnership Development Plan

The table below summarizes existing partners and targeted partnerships by classification (operational, vendor, service, co-branding, funding partners) and by organizational type.

	Public Partners	Not-for-profit Partners	Private / Enterprise Partners
Operational Partners	<ul style="list-style-type: none"> • Skidaway SP • Fort Morris SHS • Fort McAllister SHP • Fort King George SHS 	<ul style="list-style-type: none"> • Friends of Wormsloe SHS • Wormsloe Foundation • Georgia Historical Society 	<ul style="list-style-type: none"> • Area Private Tour Companies
Vendor Partners			<ul style="list-style-type: none"> • Sandfly BBQ • Colonial Sutlers • Coca-Cola
Service Partners	<ul style="list-style-type: none"> • Fort Frederica NM 	<ul style="list-style-type: none"> • Savannah CVB • Savannah CoC • Nature Conservancy • Wormsloe Institute for Environmental History • Georgia Historical Society 	
Co-branding Partners	<ul style="list-style-type: none"> • Georgia State Parks and Historic Sites 	<ul style="list-style-type: none"> • Georgia Historical Society 	
Funding Resource Development Partner		<ul style="list-style-type: none"> • Friends of Wormsloe SHS • Friends of Georgia State Parks and Historic Sites • Wormsloe Foundation 	

Marketing and Sales Plan

Marketing and Sales Goals

Marketing and sales goals for Wormsloe are based on the following desired outcomes:

1. Increase visitation
2. Increase admissions revenue
3. Increase resale revenue

In order to meet these goals, examples of specific target outcomes were identified in the areas detailed in the table below.

Area of Focus	Current 2011	Goal by 2012	Goal by 2013	Goal by 2014	Goal By 2015
Visitation	29,500	30,302	31,514	33,000	35,000
Admissions Revenue	130,000	145,600	152,880	158,995	163,765
Resale Revenue	30,000	33,000	34,650	36,036	37,117

Marketing and Promotion Strategies

PUBLICITY AND SOCIAL MEDIA

Wormsloe will approach marketing and publicity planning using the following guidelines and themes:

1. Event Publicity

Major events benefit by having short stories in local, regional, and statewide newspapers and online social media hooks planted that run three to four weeks in advance of the event up to the date of the event itself. Stories and media need to be cultivated with contacts and online sales channels several weeks in advance of the time the stories need to run. Special interest interviews on morning, noon, and evening television news programs, radio interviews on popular rush-hour programs, and blogs on known affinity online sites should also be included.

2. Program Publicity

Special and unique programs should have feature stories in magazines, weekly newspapers, and statewide daily newspapers that are aimed at placements as front-page or sectional front-page stories. These stories are most effective if they run shortly before the season that the featured program begins. This will likely require several weeks of advanced planning with media contacts. Similar coverage on television and radio should also be considered. If pre-publicity cannot be generated, post-publicity can help promote future programs.

3. Site Publicity

Site publicity focusing on a single site or sub-set of sites requires more intense planning efforts to attract multiple writers and editors from target publications. Wormsloe could host several seasonal media familiarization tours (with 10 to 15 writers or editors) to familiarize them with the site and its benefits and amenities. Stories and features resulting from such tours typically take between two and six months to materialize so the tours should focus on experiences, benefits, and programs that would be available when the stories are expected to run.

Georgia State Parks and Historic Sites

Examples and suggested opportunities for events, programs and related publicity efforts based on the themes described above at Wormsloe are provided in the table below.

Event Publicity	Program Publicity	Site Publicity
Colonial Faire and Muster	War of Jenkins' Ear	Georgia's Colonial Coast
	Colonial Tools and Skills	Georgia Plantations
	Georgia's First Fourth	Hosts of the Coast
	Colonial Christmas	Savannah Sites to See
	Colonial Cricket	Invasion of Skidaway Island
	A World Lit By Fire	

PACKAGING

Examples and suggested packages for Wormsloe are provided in the table below.

Package	Package Details
Skidaway/Wormsloe Package Deal	Discounted admission to Wormsloe with camping at Skidaway
Skidaway/Wormsloe/Fort McAllister/Fort Morris Package deal	Discounted admission to historic sites with camping at Skidaway or Fort McAllister
Coastal Parks and Historic Sites	Discounted admission to historic sites with camping at a park
Wormsloe/Skidaway Wedding Package	Ceremony and photographs at Wormsloe; reception at Skidaway.

GROUP SALES

Types of groups within which specific target customers can be identified for Wormsloe are listed below:

- School groups (2nd, 4th, 8th, 10th grades)
- Families
- Retired couples
- Girl/Boy Scouts
- Special interest groups
- International visitors
- Church groups
- Senior groups

INCENTIVIZING NEW AND REPEAT VISITATION

Wormsloe will utilize the following strategies and/or incentives to encourage new and repeat visitation starting in FY 2012:

- School group programs are particularly cost effective. Extend invitations to school teachers to bring their students to the site for tailor-made educational programs. Encourage the teachers to use Wormsloe and its interpreters as a tool in teaching the curriculum. Conduct outreach programs at schools to attract teachers, students, and parents to the site.
- Regular repeat visitors patronize the gift shop and help spread the word about the site; therefore, we will encourage sales of Friends memberships, which allow visitors to make more regular use of the site and thereby spend more money! Highlight available trails and regular interpretive programs to keep these “regulars” coming back to the site.
- Advertise daily programs on the state parks website and through social media. List these programs in advance and provide visitors with a clear expectation of what it entails.

Marketing and Sales Metric Goals

The following marketing and sales metric goals and/or others will be monitored and progress reported at Wormsloe:

1. Loyalty and repeat customers = 20%.
2. Brand confidence & customers-recruiting-customers = 40%

Revenue Generation Plan

Revenue / Cost Recovery Goals

Wormsloe has set a financial goal of increasing annual revenues 6% to 15% annually between 2012 and 2015. The largest revenue growth opportunity is most likely FY2011 and FY2014 due to an admission rate increase. The table below details projected revenue growth leading up to 2015, based upon a nominal growth of revenues each year.

Year	% Growth from Previous Year	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
2010	Base Year	\$27,664	\$9,772	\$10,161	\$13,981	\$10,949	\$7,678	\$6,766	\$9,160	\$15,068	\$20,966	\$19,475	\$13,739	\$165,379
2011	6%	\$29,324	\$10,358	\$10,771	\$14,820	\$11,606	\$8,139	\$7,172	\$9,710	\$15,972	\$22,224	\$20,644	\$14,563	\$175,302
2012	19%	\$34,895	\$12,326	\$12,817	\$17,636	\$13,811	\$9,685	\$8,535	\$11,554	\$19,007	\$26,447	\$24,566	\$17,330	\$208,609
2013	19%	\$41,525	\$14,668	\$15,252	\$20,986	\$16,435	\$11,525	\$10,156	\$13,750	\$22,618	\$31,471	\$29,233	\$20,623	\$248,245
2014	7%	\$44,225	\$15,622	\$16,244	\$22,351	\$17,503	\$12,274	\$10,816	\$14,643	\$24,088	\$33,517	\$31,133	\$21,964	\$264,381
2015	6%	\$46,878	\$16,559	\$17,218	\$23,692	\$18,554	\$13,011	\$11,465	\$15,522	\$25,534	\$35,528	\$33,001	\$23,281	\$280,244

These projections would result in a total of 69% cumulative growth in total annual revenues between FY2010 and FY2015. If operational expenses can remain unchanged between FY 2011 and FY 2015 (with reductions in some areas to offset increases in others), then the overall cost recovery of the site will be approximately 96.5% in FY 2015 at these projected revenue levels. This is higher than the annual financial performance of the site in FY 2010, which was operated at 63% cost recovery in that year.

Revenue Generation Strategies

PRICING PLAN

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
HISTORIC SITES										
Wormsloe										
Adults	\$4.00	\$4.00	\$4.00	\$5.00	\$5.00	\$6.00	\$8.00	\$10.00	\$10.00	\$10.00
Seniors	\$3.50	\$3.50	\$3.50	\$4.50	\$4.50	\$5.50	\$7.50	\$9.50	\$9.50	\$9.50
Adult Groups	\$3.00	\$3.00	\$3.00	\$4.00	\$4.00	\$4.00	\$6.00	\$6.00	\$6.00	\$6.00
Youth (6 - 17)	\$2.50	\$2.50	\$2.50	\$3.50	\$3.50	\$3.50	\$4.50	\$4.50	\$4.50	\$4.50
Youth Groups (6 - 17)	\$2.00	\$2.00	\$2.00	\$3.00	\$3.00	\$3.00	\$4.00	\$4.00	\$4.00	\$4.00
Child/Groups (Under 6)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1.00	\$1.00	\$1.00	\$1.00	\$1.00

INNOVATIVE PROGRAMMING AND SPECIAL EVENTS PLAN

Program / Event	Theme / Purpose	Scheduled Date/Season	Frequency	Target Participation	Target User Fee	Target Cost Recovery
Fire in the Night	Educational, Fun, Sensory	October	Annually	100	Regular Admission	150%
Colonial Sports and Games	Educational, Fitness, Fun	July 4 Weekend	Annually	100	Regular Admission	150%

PARTNERSHIPS AND CONCESSIONS PLAN

Service / Partnership	Term of Service	Financial Objective	Contract Manager
Georgia Historical Society	1 weekend	Recover cost of the Colonial Faire and Muster	Site Manager
Sandfly BBQ	1 weekend	Provide food/beverages at Colonial Faire and Muster	Site Manager

Expense Management Plan

Personnel Assignments

The following actions will be taken to proactively manage labor costs via personnel assignments and classifications.

Action	Timeline	Outcome
Eliminate full-time General Clerk position and replace with two hourly positions	July 2011	Annual labor cost reduced to 67% from 74%
Re-allocated Trades Craftsman position to Interpretive Ranger. Convert one or two hourly interpreters to hourly maintenance.	2014	Increased programming capability and reduced maintenance costs. Much of the skilled maintenance is already outsourced. Would also allow for a seven day operation.

Management Techniques

The following actions will be taken to proactively manage labor costs via management techniques.

Action	Timeline	Outcome
Train hourly employees to handle resale operations and front desk customer service	July 2011	Reduced labor costs, increased productivity
Continue to use volunteers to assist with site maintenance and operations	July 2011	Site maintenance plan complete; increased efficiency with routine tasks

Adjusted Levels of Service

The following actions will be taken to proactively manage labor costs via reduced levels of service.

Action	Timeline	Outcome
No reductions in service required according to this plan		

Financial Pro Forma

The following five-year financial pro forma projects operating expenses, earned revenues and cost recovery through FY 2015. These pro forma are based on the strategies and desired outcomes identified in this business plan, especially the revenue generation and expense management plans, and are linked to corresponding performance goals.

Expense Pro Forma

Wormsloe		2011 (Actual)	2012	2013	2014	2015
State Historic Site						
Operational Expenses						
REGULAR SALARIES	\$111,921	\$67,528	\$85,750	\$85,750	\$85,750	
ANNUAL LEAVE PAY						
OTHER SUPPLEMENTAL						
OVERTIME						
TEMPORARY/CASUAL LABOR	\$25,406	\$78,000	\$75,000	\$75,000	\$75,000	
FICA	\$7,750	\$5,000	\$6,000	\$6,000	\$6,000	
RETIREMENT	\$11,651	\$7,000	\$9,000	\$9,000	\$9,000	
HEALTH INSURANCE	\$22,458	\$13,000	\$17,000	\$17,000	\$17,000	
UNEMPLOYMENT INSURANCE						
ASSESSMENTS BY MERIT						
DRUG TESTING						
PERSONAL SERVICES	\$179,186	\$170,528	\$192,750	\$192,750	\$192,750	
POSTAGE	\$650	\$500	\$500	\$550	\$600	
MOTOR VEHICLE EXPENSES	\$8,200	\$8,000	\$8,000	\$8,000	\$8,000	
PRINTING & PUBLICATION	\$150	\$150	\$150	\$200	\$200	
SUPPLIES & MATERIALS	\$25,000	\$25,000	\$25,000	\$25,000	\$25,000	
REPAIRS & MAINTENANCE	\$13,000	\$5,000	\$5,000	\$5,000	\$5,000	
EQUIPMENT >\$1000< \$5,000						
WATER & SEWAGE	\$1,200	\$1,300	\$1,300	\$1,350	\$1,400	
ENERGY	\$8,500	\$9,000	\$10,000	\$11,000	\$12,000	
RENTS	\$1,798	\$2,200	\$2,300	\$2,400	\$2,500	
INSURANCE & BONDING	\$1,397	\$2,057	\$2,057	\$2,100	\$2,150	
FREIGHT						
PURCHASING CARD						
OTHER OPERATING EXPENSES	\$3,700	\$7,500	\$7,500	\$7,500	\$7,500	
CLAIMS & BONDS & INTEREST						
TRAVEL						
REGULAR EXPENSES	\$63,594	\$60,707	\$61,807	\$63,100	\$64,350	
MOTOR VEHICLE EQUIPMENT						
EQUIPMENT PURCHASES >5000						
CAPITAL LEASE Prin & Int						
REAL ESTATE RENTALS						
VOICE/DATA COMMUNICATIONS	\$2,500	\$2,700	\$2,700	\$2,800	\$2,900	
PER DIEM & FEES						
PER DIEM & FESS EXPENSE						
CONTRACTS						
ADVERTISING - PROCUREMENT CARD						
RESALE	\$34,000	\$33,000	\$30,000	\$30,000	\$30,000	
TOTAL OTHER EXPENDITURES	\$36,500	\$35,700	\$32,700	\$32,800	\$32,900	
GRAND TOTAL	\$ 279,280	\$ 266,935	\$ 287,257	\$ 288,650	\$ 290,000	

Georgia State Parks and Historic Sites

Revenue Pro Forma

Wormsloe State Historic Site						
Revenue (Fund) Sources	Revenue Sources Description	FY 2011 (Actual)	FY 2012	FY 2013	FY 2014	FY 2015
60001	CONCESSION AND TP NON-FOOD	\$ (30,000)	\$ (35,700)	\$ (37,842)	\$ (38,977)	\$ (40,536)
60008	SWIMMING		\$ -	\$ -	\$ -	\$ -
60020	SHORT/OVER	\$ 10	\$ 11	\$ 12	\$ 12	\$ 12
60022	HIST. SITE ADMISSIONS	\$ (130,000)	\$ (162,500)	\$ (199,875)	\$ (213,866)	\$ (228,409)
60025	REFUNDS		\$ -	\$ -	\$ -	\$ -
60036	PROGRAM FEES		\$ -	\$ -	\$ -	\$ -
60041	SOFT DRINK SALES		\$ -	\$ -	\$ -	\$ -
60049	MISC DONATIONS	\$ (10,000)	\$ (5,000)	\$ (5,250)	\$ (5,460)	\$ (5,624)
60073	DISABLED VET DISCOUNT		\$ -	\$ -	\$ -	\$ -
60080	CR CARD CHGBACKS-PARKS		\$ -	\$ -	\$ -	\$ -
60090	FOOD/BEV ITEMS TO GO		\$ -	\$ -	\$ -	\$ -
60092	"Friends" Discount at Parks		\$ -	\$ -	\$ -	\$ -
60099	SALES TAX	\$ (5,000)	\$ (5,600)	\$ (5,880)	\$ (6,115)	\$ (6,360)
62004	PROGRAM FEES		\$ -	\$ -	\$ -	\$ -
TOTAL		\$ (174,990)	\$ (208,789)	\$ (248,835)	\$ (264,407)	\$ (280,917)

Total / Cost Recovery Pro Forma

Wormsloe State Historic Site					
TOTAL PRO FORMA	2011 (Actual)	2012	2013	2014	2015
Visitation	29,137	30,302	31,514	32,775	33,816
Operational Expenses	\$ 279,280	\$ 266,935	\$ 287,257	\$ 288,650	\$ 290,000
Earned Revenues	\$174,990	\$208,789	\$248,835	\$264,407	\$280,917
% Cost Recovery	63%	78%	87%	92%	97%