

# **Little White House Historic Site Business & Management Plan**

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**Prepared June 2011; Finalized December 2012**

**Direction 2015 – Sustainable Business Planning**

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## Executive Summary

The Parks, Recreation and Historic Sites Division (PRHSD) of the Georgia Department of Natural Resources (DNR) is transitioning the management of Roosevelt's Little White House State Historic Site (LWH) 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	Little White House State Historic Site
Site Manager	Robin Glass
Region Manager	Eric Bentley
Date of Business Plan completion	March 15, 2011
Site size	163 acres
Total number of visitors (FY 2010)	75,635
Total operating budget (FY 2010)	\$ 867,413
Total earned revenues (FY 2010)	\$ 618,705
Operational cost recovery (FY 2010)	71%
Average operating cost per visitor (FY 2010)	\$ 11.47
Average earned revenue per visitor (FY 2010)	\$ 8.18
Average cost recovery <sup>1</sup> (FY 2008 – 2010)	73%
Target cost recovery (FY 2015)	100%
Total full-time employees <sup>2</sup>	6
Total part-time employees <sup>3</sup>	12
Primary service markets <sup>4</sup>	Atlanta, Macon, Columbus
Primary attractors/visitor appeal factors	Presidential history of Franklin D. Roosevelt
Leading opportunities for improved site performance	Expanded usage of site to include weddings, family reunions, additional recreational opportunities, walking trails designed for special needs, bird programs, updated exhibits to include more hands-on type displays, new programs, partnership events with RWSIR and FDR State Park, and the addition of new facilities including a program building and group shelter.

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

<sup>1</sup> Current employees, not including vacancies.

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<sup>1</sup> Major population centers within a two-hour drive from the site

## Site Summary and Key Attractions

The 163-acre site of the Little White House (LWH) is located in a rural setting, roughly 70 miles from major population centers in Georgia like Atlanta and Macon and 40 miles from Columbus. It is roughly 50 miles from Interstate 75 and 30 miles from Interstate 85. The LWH is located in a relatively isolated part of Georgia with limited overnight accommodations, requiring marketing to position it as a destination attraction in order to achieve cost recovery goals. LWH is located near 5 metropolitan areas of Atlanta, Columbus, Newnan, Macon and LaGrange and marketing efforts should be concentrated in these areas targeting specific groups (military, seniors, civic organizations and home schools).

### Key Attractions

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

- Little White House
- Memorial Museum
- Servant's Quarters
- Guest House
- Flag and Stone Walk
- Historic Pool Complex
- Legacy Exhibit
- Gift shop
- Interpretive programs and special events

## Financial Targets for Little White House State Historic Site

The table below details the total operating expenses and earned revenues for Little White House State Historic Site 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 100% cost recovery. This table also calculates the necessary change from 2010 operating expenses and revenues.

Little White House State Historic Site	Target Visitation Growth from 2010	Target Change in Visitation		
Visitation Assumptions	15%	11,345	2010	2015 Target
	2008	2009	2010	
<b>Visitors</b>	87,197	83,695	75,635	86,980
<b>Total Expenses</b>	\$ 929,409	\$ 835,794	\$ 867,413	\$ 715,221
<b>Total Revenues</b>	\$ 667,489	\$ 628,809	\$ 618,705	\$ 717,248
<b>Cost per Visitor</b>	\$ 10.66	\$ 9.99	\$ 11.47	\$ 8.22
<b>Revenue per Visitor</b>	\$ 7.65	\$ 7.51	\$ 8.18	\$ 8.25
<b>State Financial Support per Visitor</b>	\$ (3.00)	\$ (2.47)	\$ (3.29)	\$ 0.02
<b>Total Cost Recovery</b>	72%	75%	71%	100%
<b>Change from 2010 Expenses</b>				\$ (152,192)
<b>Percent Change from 2010 Expenses</b>				-17.55%
<b>Change from 2010 Revenues</b>				\$ 98,543
<b>Percent Change from 2010 Revenues</b>				15.93%

## Key Recommendations

### **Primary / Short Term Recommendations**

1. Operate the site using cost-based accounting, including the net cost recovery achieved annually.
2. Conduct in-park surveys annually to assess how well customer satisfaction levels are being met. LWH should strive to have 90% of visitors responding to 'Comment Cards' report that they were either 'satisfied' or 'very satisfied' (or some comparable metric to be developed). Programs or services that fall below that standard should be critically reviewed, enhanced, and results monitored; those with a history of poor performance should be considered for elimination.
3. Evaluate and pursue opportunities to employ concessionaires or private or public service providers on-site if they can be more cost-effective. For example, explore the development of a concessionaire agreement to manage private events on-site such as weddings.
4. Collect a statistically-valid sample of ZIP code data from visitors using the new zip code Google document provided. Collect 3 samples a day at 9 and use the results to improve programming and marketing efforts to appeal to a broader audience.
5. Utilize a minimum of six special events annually and monthly temporary displays to help draw more visitors to the site.
6. Seek local partners such as RWSIR, Harris County Chamber, Meriwether Chamber, Presidential Pathways, West Georgia Tech, etc. to help support operations, programs, and service delivery and to develop more cross-marketing events.
7. Continue to develop more programs involving interns, inmate labor for maintenance, student trainees from RWSIR, volunteers and Friend members to assist in operation of this site. Keep staff operational cost (with benefits) at or below 65% of the total operational budget.
8. Enhance facilities such as a program/event center for conferences and special events and increase program offerings to include interactive displays, to provide a minimum of 10 unique experiences for each visitor while maintaining at least a 90% customer satisfaction rating. Include a system to monitor these programs to insure they are self-sustaining and profitable.
9. Manage Little White House according to well-defined maintenance, program and operational standards monitored and enforced by region managers and senior management. Partner with FDR to create a joint work-force for maintenance and special events.
10. Continue to enhance the working relationship with Friends of the Little White House by involving them as much as possible in fund raising, volunteering and financial support of the site and its programming and outreach.
11. Continue to work with civic organizations in providing both physical and financial assistance for the site. Some present ones are AT&T, Boy Scouts of America, Masons, VFW, etc.
12. Perform a thorough net cost-of-service analysis on major functions of site operations, including the detailed analysis of labor requirements (by task) that has already been produced by site staff. Thereafter, update costs to deliver services on a biennial schedule.
13. Review and update rates at the site on an annual basis to recover the total net cost of service for important and visitor-supported services.

14. Develop on-line sales of gift shop and retail items associated with the site in order to increase site generated revenues. This is a must for any business in this economic environment.
15. Track total economic impact of the site on the local communities and region and share with decision-makers, elected officials, local business operators, and others to demonstrate the impact of LWH. Utilize the "Fact Cards" provided by Friends of Georgia State Parks to show the economic impact the LWH makes on this area.
16. 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.
17. Review and update rates annually to recover to attempt to recover the cost of all visitor supported services and important services.
18. Construct and upgrade facilities and amenities at the site that are likely to have a cost recovery level at or above 100%. This is a Presidential site and should look like one. Suggestions include upgrading the theater, enhancing signage throughout the site and at its entrance (nothing showing this is a state historic site or a national historic landmark), enhancing landscaping (the landscaping here is very old and over-grown and needs to be updated), updating interpretive displays and exhibits to remove the very dated look of our museum, and providing free Wi-Fi at the site. Wi-Fi is a request we get a lot. Everyone carries a device that uses it and expects it on this site. The photos they post on Facebook, etc. are free advertising. This would also allow us to use QR codes to really bring this site to life.
19. Add more youth-focused services, programs and amenities at the site that appeal to younger audiences, families and educational groups such as home schools, civic groups and college level visitors.
20. Add more services, programs and amenities that appeal to young people and older adults.

#### **Secondary / Long Term Recommendations**

1. Establish programs to expand usage of the site. With some capital improvements we could utilize the site at night and do some special event programs like wine and cheese, night photography.
2. Improve the recreational amenities of the site to address modern and diverse uses. Although the historic 'footprint' is a reasonably small portion of the total acreage of the site, installing walking trails or low-infrastructure recreational facilities could draw additional visitors without significantly affecting the historic flavor of the property. We have in the past done bird watching programs but have never had the availability to move into the wooded areas surrounding the historic area. A special needs accessible walking trail would allow us to do expanded and larger bird watching as well as nature type programs. This is a beautiful property and should be utilized for both educational and recreational programs. We could also use these types of trails to hook into the trail system at FDR and allow visitors to obtain access to both properties. I also believe this could also be tied into the RWSIR trails already in place. This would open up a huge opportunity for geo-caching which has members in the millions worldwide and a vast untapped market opportunity.
3. Engage the local community, user groups, and private organizations to improve connectivity between LWH and both FDR State Park and the Roosevelt-Warm Springs Institute for Rehabilitation.

4. Install an improved retail point-of-sale and inventory tracking system to better provide instant access to information we need daily in our retail environment.
5. Build a program/event center. This would allow the LWH to become the premier spot to hold conferences and expanded programs. We are very limited to room to expand our programming efforts. If it rains on any given day of a program we have nowhere to put a large group of participants. The RWSIR has an auditorium for some programming but it is not conducive to the type of programs we do. We also have no place in the general area (other than Callaway which is very cost prohibitive) to hold historic conferences. This is a market that is wide open in this area and not being tapped.

## Site and Operations Assessment

This site inventory and operations assessment is a culmination of analyses and findings from a review of the condition of facilities, infrastructure, and operations at Little White House State Historic Site (LWH). The findings and observations 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 LWH, and provides the assessed condition of each as reviewed in November 2010.

Site Asset / Amenity	Quantity	Condition
Total acreage	163	Good
Little White House	1	Fair
Memorial Museum	1	Good
Servant's Quarters	1	Fair
Guest House	1	Fair
Flag and Stone Walk	1	Fair
Historic Pool Complex	1	Fair
Legacy Building	1	Good
Gift Shop	1	Fair
Maintenance Complex	1	Good
Picnic Area	3	Fair
Office Area	1	Fair
Manager's Residence	1	Fair
Pump house building	1	Good
Willy's Pavilion	1	Fair
Marine Corps Sentry Posts	9	Fair
Secret Service Post	1	Good

### 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
Event area / program space addition	High
Improved signage at entrance and roadway	Moderate
Theater improvements including seat backs	High
Upgrade lighting in Museum	Completed
Updated / enhanced landscaping	High
Storage area of gift shop	High
Interactive / updated displays and exhibits	Moderate
Memorial Fountain improvements	High
Water irrigation system for landscaping	Moderate
Nature boardwalk	Moderate
Enlarge glass enclosed area of visitor center/museum	High

## 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, and
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) Value added or 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 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 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 services offered at the Little White House have been identified as **core services**:

- **Active management of the natural and cultural resources of the site (i.e., FDR structures and artifacts housed in structures) in order to protect their integrity**
- **Classification and preservation management of stored artifacts**
- **Open and public access to the site and its resources**
- **Site appropriate education, interpretation and recreational opportunities**
- **Public safety**
- **Maintenance of grounds, facilities and infrastructure**

### 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 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 services offered at the Little White House have been identified as **important services**:

- **Self-guided interpretation and education programs**
- **Support for historic researchers**

### 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 services to be classified as visitor supported are:

- The services expand, enhance or support Core Services, 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 services offered at the Little White House have been identified as **visitor supported services**:

- **Gift Shop**
- **Ranger guided interpretation and elective educational programs**
- **Special events / programs not related to the mission of the site or outside the normal programming standards (e.g., wedding receptions, etc.)**

### **Staffing Assessment**

Labor costs at the Little White House State Historic Site represent the largest area of budgetary expense at an average of 69% of the total operating budget each year for the last five years, which is higher than the target of labor costs (including benefits) not exceeding 65% of 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**

<b>Position / Title</b>	<b>Current Quantity (filled FTE positions)</b>	<b>Vacancies</b>	<b>Annual Hours</b>
Historic Site Manager	1	0	2,600
Secretary 2	0	1	2,080
Interpretive Ranger	2	0	4,160
Sales Manager 2	1	0	2340
Utility Worker 1	1	0	2080
Assistant Manager 2	0	1	2,340
General Trade Craftsman	1	0	2080
<b>TOTAL</b>	<b>6</b>	<b>2</b>	<b>17,680</b>
	<b>6</b>	<b>2</b>	<b>17,680</b>

#### **Part Time Employees**

<b>Position / Title</b>	<b>Current Quantity (filled FTE positions)</b>	<b>Vacancies</b>	<b>Hours</b>
Tour Guide	11	0	13312
Grounds Maintenance	1	0	1248
<b>TOTAL</b>	<b>12</b>	<b>0</b>	<b>14,560</b>

#### **Labor Support**

<b>Labor Support</b>	<b>Annual Hours</b>
Volunteers	1,000
Community Service Workers	0
Engineering and Construction Crews	40
Resource Management Crews	0
<b>TOTAL</b>	<b>1,040</b>

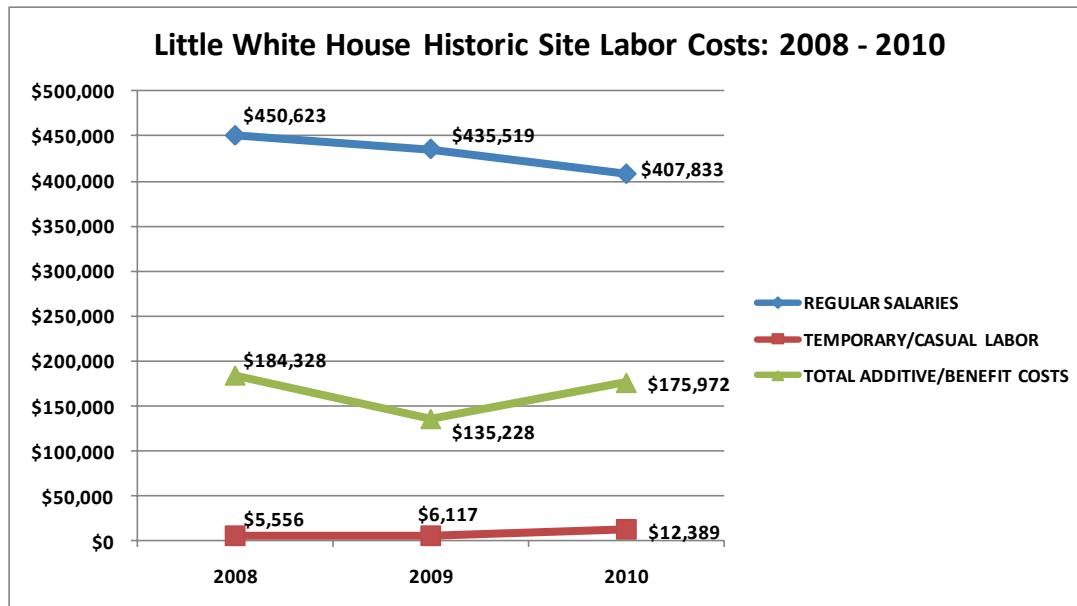
#### **Total Labor Hours**

<b>Labor Type</b>	<b>Annual Hours</b>
<b>Full Time Equivalent Employees</b>	<b>17,680</b>
<b>Part Time Employees</b>	<b>14,560</b>
<b>Labor Support</b>	<b>1,040</b>
<b>TOTAL Annual Labor Hours</b>	<b>33,280</b>

## Georgia State Parks and Historic Sites

### LABOR BUDGET SUMMARY

Little White House	2008 Year End Expenses	2009 Year End Expenses	2010 Year End Expenses	% Change from 2,008
Account Code and Sub-Class Expenditure Descriptions				
REGULAR SALARIES	450,623	435,519	407,833	-9%
ANNUAL LEAVE PAY	4,076	3,660	6,195	52%
OTHER SUPPLEMENTAL	271	300	738	173%
TEMPORARY/CASUAL LABOR	5,556	6,117	12,389	123%
FICA	29,745	28,470	27,291	-8%
RETIREMENT	42,425	40,637	51,865	22%
HEALTH INSURANCE	103,929	58,447	86,146	-17%
UNEMPLOYMENT INSURANCE	797	627	859	8%
ASSESSMENTS BY MERIT	3,087	3,087	2,877	-7%
<b>PERSONAL SERVICES</b>	<b>640,507</b>	<b>576,863</b>	<b>596,194</b>	<b>-7%</b>



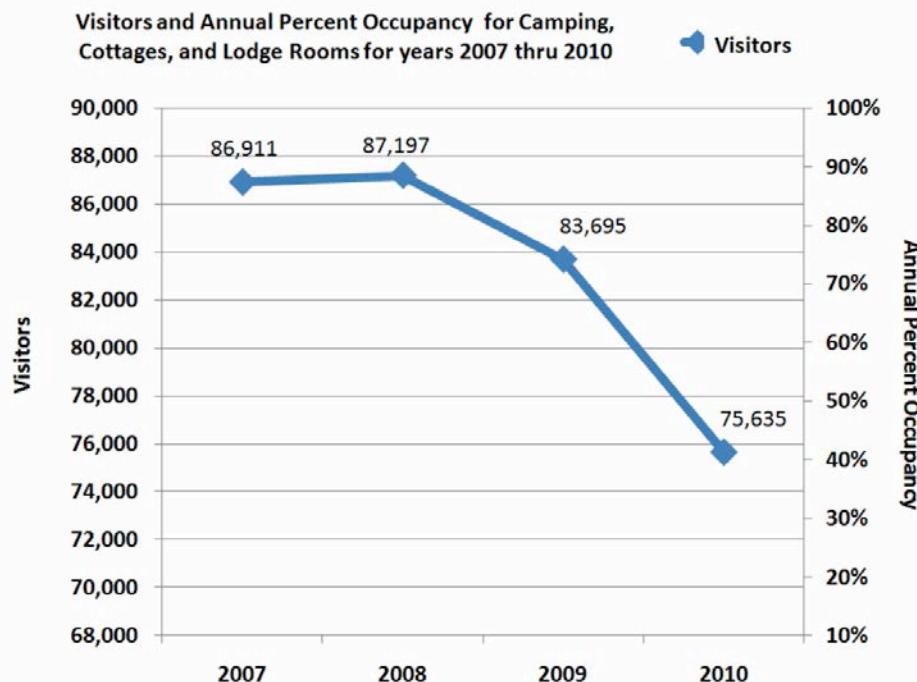
### Visitation and Occupancy

Overall annual visitation to the site has trended downward from 2007 to 2010, decreasing by 13% or over 11,000 visitors. This is largely attributed to economic conditions inhibiting school group visitation, as well as gasoline shortages and high prices statewide. The programming on the site has remained the same and contributes in a small way to lower visitation. We are adding new programs this year to try to draw visitors to the site. This is very difficult now with the staffing issues we are facing. I would like to see more site targeting when it comes to marketing and make it historic specific marketing. The past marketing efforts have been primarily focused on state parks and not historic sites. There is a large market out there that focuses on historic adventures and programs.

Year	Total Visitation
2007	86,911
2008	87,197
2009	83,695
2010	75,635

The graph below illustrates visitation over the last four years.

### Little White House State Historic Site



#### Customer Service and Satisfaction

Currently the site monitors customer service through paper, hard copy customer comment cards. These cards are not collected in a statistically valid method, are often only reviewed to identify areas of customer service concerns or issues, and are not consistently used for managing customer service performance issues overall at the site. However, having said all this, the site is well known for its high level of customer satisfaction and in both 2009 and 2010, 100% of customers responded that they were either 'satisfied' or 'very satisfied' with their expectations at LWH.

#### Customer Service and Satisfaction Chart

Site	Year	Customer Satisfaction Level
Roosevelt's Little White House	2009	100%
	2010	100%

## Financial Performance Assessment

### Operational Expenses

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

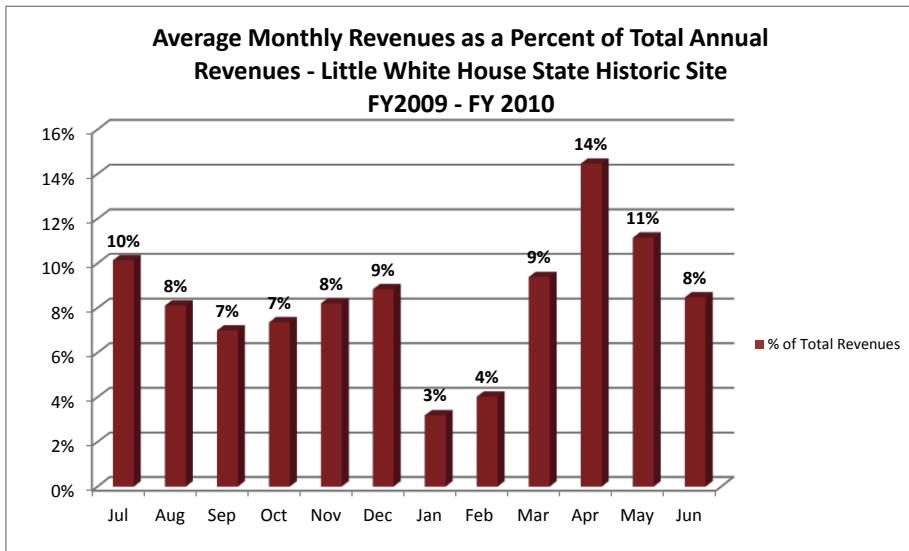
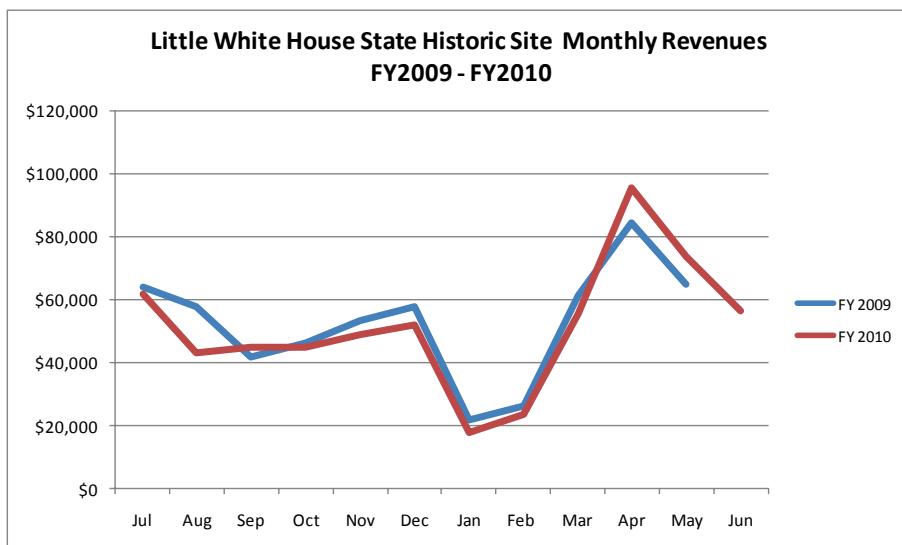
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<b>PERSONAL SERVICES</b>	<b>640,507</b>	<b>576,863</b>	<b>596,194</b>	<b>-7%</b>
POSTAGE	707	912	836	18%
MOTOR VEHICLE EXPENSES	7,434	5,750	6,711	-10%
PRINTING & PUBLICATION	40	395		-100%
SUPPLIES & MATERIALS	33,170	17,633	17,361	-48%
REPAIRS & MAINTENANCE	10,932	9,482	9,429	-14%
WATER & SEWAGE	133	215	302	126%
ENERGY	59,190	61,629	64,057	8%
RENTS	2,050	2,297	3,490	70%
INSURANCE & BONDING	9,934	12,310	11,225	13%
OTHER OPERATING EXPENSES	1,351	1,098	1,083	-20%
CLAIMS & BONDS & INTEREST		111		
TRAVEL	6,711	0	846	-87%
<b>REGULAR EXPENSES</b>	<b>131,652</b>	<b>111,831</b>	<b>115,340</b>	<b>-12%</b>
MOTOR VEHICLE EQUIPMENT	9,504			-100%
VOICE/DATA COMMUNICATIONS	5,670	5,090	4,937	-13%
CONTRACTS	3,617	2,711	2,794	-23%
RESALE	138,459	139,298	148,149	7%
<b>TOTAL OTHER EXPENDITURES</b>	<b>157,249</b>	<b>147,100</b>	<b>155,880</b>	<b>-1%</b>
<b>GRAND TOTAL</b>	<b>\$ 929,409</b>	<b>\$ 835,794</b>	<b>\$ 867,413</b>	<b>-7%</b>

### Earned Revenues

Earned revenues at Little White House State Historic Site have decreased since 2008, which is largely attributed to the corresponding decrease in overall visitation. Monthly earned revenues for the last two years (see table below) indicate that the total annual revenue decreased 2% from 2009 to 2010, with the largest **decreases** in monthly revenues during August (25%), December (10%), and January (18%), and the largest **increases** in revenues during the months of September (7%), April (13%), May (14%), and June (16%).

FY 2009 - FY 2010 Monthly Revenue													
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
FY 2009	\$64,232	\$57,603	\$41,985	\$46,448	\$53,294	\$57,735	\$21,859	\$26,233	\$61,212	\$84,572	\$64,771	\$48,863	\$627,035
FY 2010	\$61,730	\$43,177	\$44,970	\$45,043	\$48,770	\$52,100	\$17,826	\$23,752	\$55,509	\$95,375	\$73,836	\$56,617	\$616,563
Avg	\$62,981	\$50,390	\$43,478	\$45,746	\$51,032	\$54,918	\$19,842	\$24,993	\$58,361	\$89,973	\$69,303	\$52,740	\$621,799
% of Total Revenues	10%	8%	7%	7%	8%	9%	3%	4%	9%	14%	11%	8%	100%
% change	-4%	-25%	7%	-3%	-8%	-10%	-18%	-9%	-9%	13%	14%	16%	-2%

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



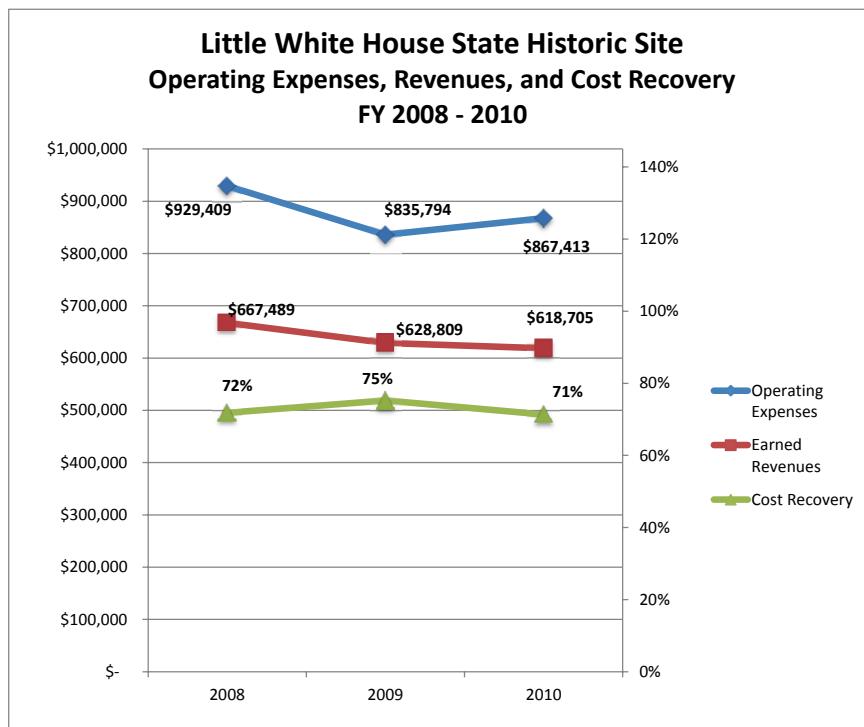
## Georgia State Parks and Historic Sites

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### Cost Recovery Trends

Little White House State Historic Site consistently achieves 71-75% cost recovery of annual operational expenses through earned revenues. This is detailed and illustrated in the table and graph below.

Year	Operational Expenses	Earned Revenues	Percent Cost Recovery
2008	\$926,321	\$667,489	72%
2009	\$835,794	\$628,809	75%
2010	\$867,413	\$618,705	71%



### Review of Pricing

Data on rate information for site admission fees is available as far back as 2002. There has been notable flexibility and growth in fees charged at Little White House State Historic Site since 2005, with the largest increase being in the admission fees for youth groups (100%), youth (67%), and seniors (40%). A table detailing the admission fees for Little White House State Historic Site is provided below.

	2002	2003	2004	2005	2006	2007	2008	2009	2010	\$ Growth 2005 - 2010	% Growth 2005 - 2010
Adults	\$5	\$5	\$6	\$6	\$6	\$6	\$7	\$7	\$8	\$2	33%
Seniors	\$4	\$4	\$5	\$5	\$5	\$5	\$6	\$6	\$7	\$2	40%
Adult Groups	\$3	\$3	\$5	\$5	\$5	\$5	\$5	\$6	\$6	\$1	20%
Youth (6 - 17)	\$2	\$2	\$3	\$3	\$3	\$3	\$4	\$4	\$5	\$2	67%
Youth Groups (6 - 17)	\$1	\$1	\$2	\$2	\$2	\$2	\$2	\$3	\$4	\$2	100%
Child/Groups (5 Under)	Free	Free	\$1.00	\$1	\$1	\$1	\$1	\$1	\$1	\$0	0%

# Business and Management Plan

## Business Goals

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

### **Enhance Cost Recovery of Site Operations**

The Little White House State Historic Site is operating at a 71-75% cost recovery of operational expenses through earned revenues. While historic sites generally have a more difficult time generating revenues to offset expenses, Little White House can likely improve revenues through additional special events and other measures to draw more visitors to the site and generate higher revenues. It is critical that the site seek to increase its cost recovery to no less than 85% through enhanced revenue generation and strategic expense reductions.

### **Enhance Revenue Generation Strategies**

Increasing earned revenues will most likely result from the impacts of both increased visitation at the site and specific revenue enhancement strategies. Little White House will improve revenue generation through more flexible and dynamic admission fees, expanding retail sales to include on-line sales, increasing the number and type of special events held at the site and the fees charged for the events, and by overall fee increases for programs and facility usage.

### **Expand Special Events at the Site**

Most, if not all, of the major programs and events at the site are directly linked to the unique history of the site. This is commendable and important, but should not be the sole criteria for delivering great programming at the Little White House State Historic Site. The expansion of facilities and amenities to include an events or program area near the museum is important in order to support the development of successful, large-scale events that can be held at the site to dramatically increase overall visitation and revenue generation. These events can include, but not be limited to, art and music festivals, wine festivals, local culinary festivals, weddings and receptions.

### **Improve the Diversity and Innovation of Recreational and Interpretive Programs**

As with many historic sites, the Little White House features quality exhibits and displays that are predominantly appealing to adults. It will be crucial for the site to improve the appeal of all interpretative resources (e.g., displays, exhibits, and programs) to a wider range of age groups. For example, consideration should be given to developing exhibits that are tactile and experiential in order to best connect with younger audiences. Additionally, consideration should be given to providing more innovative exhibits including traveling displays on loan from other museums in order to encourage repeat visitation.

### **Improve the Effectiveness of Marketing and Sales**

The effectiveness of marketing and promotional activities of the Little White House State Historic Site could be improved to produce greater visitation and revenues during peak, shoulder, and off seasons. This could be achieved in part through a shift in the existing marketing approach to one that is more targeted and focused on experiential and inspirational messaging geared to historic sites. Additionally, partnerships with nearby attractions and amenities in the region should improve the ability of the site to maintain an increased and steady flow of visitors and revenue throughout the year.

**Establish Greater Consistency of Managing and Monitoring Customer Service & Satisfaction**

Little White House plans to improve the consistency of managing and monitoring customer service and satisfaction by conducting on-site surveys annually to assess how well customer satisfaction levels are being met. LWH will strive to have 90% of visitors responding to ‘Comment Cards’ report that they were either ‘satisfied’ or ‘very satisfied’ (or some comparable metric to be developed). Programs or services that fall below that standard should be critically reviewed, enhanced, and results monitored; those with a history of poor performance will be evaluated and potentially considered for elimination.

**Expand Partnership Opportunities**

Given the breadth of partnership opportunities available to LWH, multiple priorities will drive partnership opportunities for the site. This will include expanding service partnerships in which alternative and related providers in the community support the provision of programs and services to visitors at Little White House State Historic Site; expanding vendor partners to reduce the costs of materials and supplies, and related services needed by the site; and seeking co-branding partners to offset event and program costs, and to expand awareness of site programs and facilities in the site’s market area.

**Friends of Roosevelt’s Little White House**

Engage our Friends members in our business plan as a partner, to help the site meet or exceed its sustainability goals within this plan.

## **Classification of Programs and Services**

The tables below summarize the classification of programs and services at the Little White House State Historic Site 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.

<b>Core Services</b>	
<b>Program / Service</b>	<b>Target Cost Recovery</b>
Active management of the natural and cultural resources of the site in order to protect their integrity	0%
Classification and preservation management of stored artifacts	0%
Open and public access to the site and its resources	0%
Site appropriate education, interpretation and recreational opportunities	20% to 110%
Public safety	0%
Maintenance of site, grounds, facility and infrastructure	0%

<b>Important Services</b>	
<b>Program / Service</b>	<b>Target Cost Recovery</b>
Self-guided interpretation and education programs	20 to 80%
Support for historic researchers	0%

<b>Visitor Supported</b>	
<b>Program / Service</b>	<b>Target Cost Recovery</b>
Gift Shop	150% to 200+%
Ranger guided interpretation and elective education programs	100% to 120+%
Special events / programs not related to the mission of the site or outside the normal programming standards (e.g., wedding receptions, etc.)	150% to 180+%

## 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.

	<b>Public Partners</b>	<b>Not-for-profit Partners</b>	<b>Private / Enterprise Partners</b>
<b>Operational Partners</b>	<ul style="list-style-type: none"> <li>Roosevelt Institute For Rehabilitation</li> </ul>	<ul style="list-style-type: none"> <li>The Wilderness Camp</li> <li>Good Shepherd Therapeutic Camp</li> </ul>	<ul style="list-style-type: none"> <li>AT&amp;T Pioneers</li> <li>Southside Council of Atlanta</li> </ul>
<b>Vendor Partners</b>			<ul style="list-style-type: none"> <li>Coca Cola</li> <li>Georgia Power</li> <li>Georgia EMC's</li> <li>Georgia Poultry Federation</li> </ul>
<b>Service Partners</b>	<ul style="list-style-type: none"> <li>City of Warm Springs</li> </ul>	<ul style="list-style-type: none"> <li>Chamber of Commerce</li> <li>March of Dimes</li> </ul>	
<b>Co-branding Partners</b>	<ul style="list-style-type: none"> <li>FDR State Park</li> <li>Roosevelt Institute for Rehabilitation</li> </ul>		<ul style="list-style-type: none"> <li>The Bulloch House</li> <li>Callaway Gardens</li> <li>Best Western</li> <li>Hills and Dales</li> <li>Wild Animal Safari</li> </ul>
<b>Funding Resource Development Partner</b>		<ul style="list-style-type: none"> <li>Friends of Georgia State Parks and Historic Sites</li> <li>Friends of Roosevelt's Little White House</li> <li>Warm Springs Memorial Commission</li> </ul>	

## Marketing and Sales Plan

### Marketing and Sales Goals

Marketing and sales goals for the Little White House State Historic Site are based on the following criteria and desired outcomes:

1. To produce more interpretive programs that draw visitors to the site
2. To produce more large, signature events with large participation
3. To produce increased overall visitation and revenues

In order to meet these goals, examples of specific target outcomes were identified in the areas of special events participation and overall visitation and are detailed in the table below.

Area of Focus	Current Performance	Goal by 2011	Goal by 2012	Goal by 2015
Special Events	3,000 vis./yr	3,500 vis./yr	4,000 vis./yr	5,500 vis./yr
Overall Visitation	75,635	78,660	81,806	86,980

### Marketing and Promotion Strategies

#### PUBLICITY AND SOCIAL MEDIA

LWH 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, local and regional 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. The LWH in cooperation with the Warm Springs Visitor Center will host several seasonal media familiarization tours (with 10 to 15 writers or editors) to familiarize them with the LWH 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**

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

<b>Event Publicity</b>	<b>Program Publicity</b>	<b>Site Publicity</b>
Arts and Music Festival	Swim the Warm Springs	FDR Remembered
Swim the Warm Springs	Roosevelt Games	WWII Commemorations

### **PACKAGING**

Example and suggested packages for Little White House are provided in the table below.

<b>Package</b>	<b>Package Details</b>
Golf Package	Entrance into Little White House and golf at Roosevelt Institute
Guided Tours	Guided tours for private pre-arranged groups at LWH and RWSIR
Roosevelt Rewards	Free admission and discounts associated with multiple visits
FDR State Park	Discounts on weekend packages including camping or cabins

### **GROUP SALES**

Categories of groups within which specific target customers can be identified for Little White House State Historic Site are listed below:

- Families
- Youth service organizations
- Churches
- Activity or special interest clubs
- Businesses and professional groups
- Schools (public and private)
- Colleges and universities
- Associations
- Other public agencies
- Women's groups
- Community organizations

### **INCENTIVIZING NEW AND REPEAT VISITATION**

LWH will utilize the following practices to incentivize new and repeat visitation starting in FY 2012:

- Early registration discounts
- Group / bulk pricing options
- Differential pricing based upon days of week, peak or off-peak seasons, etc.
- Post peak season follow-up with visitors
- Co-branding partner benefits (e.g., members of affinity museums get discounts for certain services during specified times or redeem six Coca-Cola cans for a free souvenir from the gift shop).

### **Marketing and Sales Metric Goals**

The following marketing and sales metric goals will be monitored and progress reported at LWH:

1. Loyalty and repeat customers = 65% of customers repeat their visit in a 12-month period.
2. Brand confidence & customers-recruiting-customers = Customer referrals equal a minimum of 50% of "Where did you hear about us?" responses from visitors polled.

## Revenue Generation

### Revenue / Cost Recovery Goals

Little White House State Historic Site has set a financial goal of increasing annual revenues 3% annually between 2012 and 2015. The largest revenue growth opportunity is most likely in the shoulder season months of March, May, August, September, and October. In these months revenues are not at their lowest or highest point of the year, and have the potential to grow. 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	\$61,730	\$43,177	\$44,970	\$45,043	\$48,770	\$52,100	\$17,826	\$23,752	\$55,509	\$95,375	\$73,836	\$56,617	\$618,705
2011	3%	\$63,582	\$44,472	\$46,319	\$46,395	\$50,233	\$53,663	\$18,361	\$24,465	\$57,174	\$98,236	\$76,051	\$58,315	\$637,266
2012	3%	\$65,489	\$45,806	\$47,709	\$47,787	\$51,740	\$55,273	\$18,912	\$25,198	\$58,889	\$101,183	\$78,333	\$60,065	\$656,384
2013	3%	\$67,454	\$47,181	\$49,140	\$49,220	\$53,292	\$56,931	\$19,479	\$25,954	\$60,656	\$104,219	\$80,683	\$61,867	\$676,076
2014	3%	\$69,477	\$48,596	\$50,614	\$50,697	\$54,891	\$58,639	\$20,063	\$26,733	\$62,476	\$107,345	\$83,103	\$63,723	\$696,358
2015	3%	\$71,562	\$50,054	\$52,133	\$52,218	\$56,538	\$60,398	\$20,665	\$27,535	\$64,350	\$110,566	\$85,596	\$65,635	\$717,249

These projections would result in a total of 16% cumulative growth in total annual revenues between FY2010 and FY2015. If operational expenses can be managed with a cumulative reduction of 3% between FY 2010 and FY 2015, then the overall cost recovery of the site will be approximately 85% 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 71% cost recovery in that year.

### Revenue Generation Strategies

#### PRICING PLAN

Region	PARK RESERVABLES	Current Pricing (CY 2011)	Proposed Pricing (CY 2012)	Positive Yield Management Margin (%)
3	Little White House State Historic Site			
	Adults	\$7.00	\$10.00	+/- 15%
	Seniors	\$6.00	\$8.00	+/- 15%
	Adult Groups 20 or more	\$5.00	\$7.00	+/- 25%
	Youth (6-17)	\$4.00	\$6.00	+/- 15%
	Youth Groups (6-17) 20 or more	\$3.00	\$4.50	+/- 25%
	Child Groups (6 and under)	\$1.00	\$1.00	+/- 15%

**INNOVATIVE PROGRAMMING AND SPECIAL EVENTS PLAN**

<b>Program / Event</b>	<b>Theme / Purpose</b>	<b>Scheduled Date/Season</b>	<b>Frequency</b>	<b>Target Participation</b>	<b>Target User Fee</b>	<b>Target Cost Recovery</b>
Wine Tasting	Support of local business and site promotion	As product becomes available	Annual	100	\$20 per visitor	125%
Weddings	Wedding	Throughout the year	5 times per year	5 events varies as to size of grouping	\$500-750	125%
Family Reunions	Pool and tent usage	Throughout the year	3 times per year	100-200	\$2000-2500 based on selected options	150%
Online gift shop	On line ordering ability	Throughout the year	Daily	5% of our visitation	Regular retail prices plus handling and shipping	125%

**PARTNERSHIPS AND CONCESSIONS**

<b>Service / Partnership</b>	<b>Term of Service</b>	<b>Financial Objective</b>	<b>Contract Manager</b>
Food catering	1 year	\$1.00 per meal to park	Park Manager
Waste collection	1 year	No cost increase from previous year	Park Manager
Packaging and promotions with local businesses	1 year	Shared revenue	Park 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 current Exhibit Guide, General Clerk and Utility Worker vacancies	July 2012	Annual labor cost reduction of \$73,964
Eliminate full time Exhibit Guide Positions and Maintenance Engineer position transferred to FDR State Park	March 2012	Annual labor cost reduction of \$322,318

### Management Techniques

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

Action	Timeline	Outcome
Concession coffee service	July 2012	Annual revenue increase of \$5,000
Contracted event promotion and coordination	July 2012	Annual revenue increase of \$10,000
Increased use of volunteers for site and grounds maintenance	July 2012	Annual cost reduction of \$7,500

### Adjusted Levels of Service

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

Action	Timeline	Outcome
Adjusted mowing and landscaping schedules for portions of the site	July 2012	Annual cost reduction of \$1,000

## Financial Pro Forma

The following five-year financial pro forma projects operating expenses, earned revenues and total/cost recovery through FY 2015. These pro forma are based on the strategies and desired outcomes of the Little White House business plan, especially the revenue generation and expense management plans, and are linked to corresponding performance goals. These financial pro forma has been developed with the assumptions that **operating expenses are reduced by 0.7% annually**, and that **earned revenue and visitation are managed to grow approximately 3% annually**.

### Expense Pro Forma

Little White House State Historic Site	2010 (Actual)	2012	2013	2014	2015
<b>Operational Expenses</b>					
REGULAR SALARIES	\$407,833	\$404,978	\$186,012	\$186,012	\$186,012
ANNUAL LEAVE PAY	\$6,195	\$6,152	\$6,109	\$6,066	\$6,024
OTHER SUPPLEMENTAL	\$738	\$733	\$728	\$723	\$718
OVERTIME		\$0	\$0	\$0	\$0
TEMPORARY/CASUAL LABOR	\$12,389	\$12,303	\$115,653	\$115,653	\$115,653
FICA	\$27,291	\$27,100	\$16,900	\$16,900	\$16,900
RETIREMENT	\$51,865	\$51,502	\$51,141	\$50,783	\$50,428
HEALTH INSURANCE	\$86,146	\$85,543	\$59,810	\$59,810	\$59,810
UNEMPLOYMENT INSURANCE	\$859	\$853	\$847	\$842	\$836
ASSESSMENTS BY MERIT	\$2,877	\$2,857	\$2,837	\$2,817	\$2,797
DRUG TESTING					
<b>PERSONAL SERVICES</b>	<b>\$596,194</b>	<b>\$592,021</b>	<b>\$440,038</b>	<b>\$439,606</b>	<b>\$439,177</b>
POSTAGE	\$836	\$830	\$824	\$818	\$812
MOTOR VEHICLE EXPENSES	\$6,711	\$6,664	\$7,000	\$7,000	\$7,000
PRINTING & PUBLICATION	\$500	\$497	\$493	\$490	\$486
SUPPLIES & MATERIALS	\$17,361	\$22,642	\$22,642	\$22,642	\$22,642
REPAIRS & MAINTENANCE	\$9,429	\$9,363	\$10,000	\$10,000	\$10,000
EQUIPMENT >\$1000< \$5,000		\$0	\$0	\$0	\$0
WATER & SEWAGE	\$302	\$300	\$298	\$296	\$294
ENERGY	\$64,057	\$63,609	\$63,164	\$62,721	\$62,282
RENTS	\$3,490	\$3,466	\$3,442	\$3,417	\$3,394
INSURANCE & BONDING	\$11,225	\$11,146	\$11,068	\$10,991	\$10,914
FREIGHT		\$0	\$0	\$0	\$0
PURCHASING CARD		\$0	\$0	\$0	\$0
OTHER OPERATING EXPENSES	\$1,083	\$1,075	\$1,067	\$1,060	\$1,053
CLAIMS & BONDS & INTEREST		\$0	\$0	\$0	\$0
TRAVEL	\$846	\$840	\$500	\$500	\$500
<b>REGULAR EXPENSES</b>	<b>\$115,840</b>	<b>\$120,431</b>	<b>\$120,498</b>	<b>\$119,935</b>	<b>\$119,377</b>
MOTOR VEHICLE EQUIPMENT		\$0	\$0	\$0	\$0
EQUIPMENT PURCHASES >5000		\$0	\$0	\$0	\$0
CAPITAL/ LEASE Prin & Int		\$0	\$0	\$0	\$0
REAL ESTATE RENTALS		\$0	\$0	\$0	\$0
VOICE/DATA COMMUNICATIONS	\$4,937	\$4,903	\$4,868	\$4,834	\$4,800
PER DIEM & FEES		\$0	\$0	\$0	\$0
PER DIEM & FESS EXPENSE		\$0	\$0	\$0	\$0
CONTRACTS	\$2,794	\$2,774	\$2,755	\$2,735	\$2,716
ADVERTISING - PROCUREMENT CARD		\$0	\$0	\$0	\$0
RESALE	\$148,149	\$147,112	\$150,000	\$150,000	\$148,950
<b>TOTAL OTHER EXPENDITURES</b>	<b>\$155,880</b>	<b>\$154,789</b>	<b>\$157,623</b>	<b>\$157,570</b>	<b>\$156,467</b>
<b>GRAND TOTAL</b>	<b>\$ 867,913</b>	<b>\$ 867,241</b>	<b>\$ 718,158</b>	<b>\$ 717,111</b>	<b>\$ 715,021</b>

## Little White House State Historic Site Business Plan

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### Revenue Pro Forma

Revenue Pro Forma						
Little White House State Historic Site						
Revenue (Fund) Sources	Revenue Sources Description	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015
60001	CONCESSION AND TP NON-FOOD	\$ (187,593)	\$ (193,221)	\$ (199,017)	\$ (204,988)	\$ (211,138)
60008	SWIMMING	\$ 88	\$ 91	\$ 93	\$ 96	\$ 99
60020	SHORT/OVER	\$ 66	\$ 68	\$ 70	\$ 72	\$ 74
60022	HIST. SITE ADMISSIONS	\$ (460,769)	\$ (474,592)	\$ (488,830)	\$ (503,495)	\$ (518,600)
60025	REFUNDS	\$ 5,432	\$ 5,595	\$ 5,763	\$ 5,936	\$ 6,114
60036	PROGRAM FEES	\$ (7,138)	\$ (7,352)	\$ (7,573)	\$ (7,800)	\$ (8,034)
60041	SOFT DRINK SALES	\$ (6,828)	\$ (7,033)	\$ (7,244)	\$ (7,461)	\$ (7,685)
60049	MISC DONATIONS	\$ (200)	\$ (206)	\$ (212)	\$ (219)	\$ (225)
60073	DISABLED VET DISCOUNT	\$ 42	\$ 43	\$ 45	\$ 46	\$ 47
60080	CR CARD CHGBACKS-PARKS	\$ 43	\$ 44	\$ 46	\$ 47	\$ 48
60090	FOOD/BEV ITEMS TO GO	\$ (13,058)	\$ (13,450)	\$ (13,853)	\$ (14,269)	\$ (14,697)
60092	"Friends" Discount at Parks	\$ 141	\$ 145	\$ 150	\$ 154	\$ 159
60099	SALES TAX	\$ 33,024	\$ 34,015	\$ 35,035	\$ 36,086	\$ 37,169
62004	PROGRAM FEES	\$ (516)	\$ (531)	\$ (547)	\$ (564)	\$ (581)
<b>TOTAL</b>		<b>\$ (637,266)</b>	<b>\$ (656,384)</b>	<b>\$ (676,075)</b>	<b>\$ (696,358)</b>	<b>\$ (717,248)</b>

### Total / Cost Recovery Pro Forma

Little White House State Historic Site		2010 (Actual)	2012	2013	2014	2015
TOTAL PRO FORMA						
Visitation		77,904	79,462	81,846	84,301	86,980
Operational Expenses		\$ 867,913	\$ 867,241	\$ 718,158	\$ 717,111	\$ 715,021
Earned Revenues		\$ 637,266	\$ 656,384	\$ 676,075	\$ 696,358	\$ 717,248
% Cost Recovery		73%	76%	94%	97%	100%