



Old Salem Presidential Update

FIRST QTR 2018 HOT TOPICS

➔ **KENNETH BUCHANAN**, Old Salem's new CFO, began working on April 2, 2018. Since that time, he has been meeting with each team leader and gaining a sense of the structure and process of the staff.

➔ Vice-President of Development, **FRANCES BEASLEY** will be leaving Old Salem after over 11 years of service. She is excited to take on the role as Chief Development Officer of Victory Junction, a year-round camp for children ages 6-16 who have serious, or chronic, medical conditions. This organization is one that Frances has a personal relationship with and holds great passion for.

➔ **High Volume Days** have returned with approximately 800+ school children & chaperones per day. Most of these days are our signature **"SCIENCE ALIVE"** and **"ARTS ALIVE"** programs. The demands on the interpretive staff are extreme on these days. The Activate Main Street program has successfully costumed most full-time employees (no matter of position) and now asks the staff to cover Main Street, assisting our interpreters in the historic sites as well as out on the street.



FINANCIAL AT A GLANCE

- \$50K added to The Dorothy Enscoe Endowed Fund for Support of the Doctor's House:
- \$20K proposal submitted to City of WS for support during district infrastructure work
- \$16.8K secured for Archaeology department
- 4 planned gift prospects identified
- \$14K behind unrestricted giving (due to timing issue)

OLD SALEM INC.

Financial Analysis- Dollars in Thousands 2007-2018
Includes Town of Salem, MESDA & Retail Operations

Description	2007-2008*	2008-2009*	2009-2010*	2010-2011*	2011-2012*	2012**	2013	2014	2015	2016	2017	BUDGET 2018
Yearly Operational Surplus/(Deficit)	(1,560.4)	(1,009.9)	(594.2)	(282.7)	(92.7)	(77.7)	(289.9)	(490.2)	(360.1)	233.4	327.8	79.5
Endowment Draw	2,470.8	2,694.2	2,235.9	2,255.0	2,300.0	1,916.7	2,900.0	2,900.0	2,300.0	2,190.7	1,883.4	1,254.9
Endowment Draw to Pay Down Loan			1,000.0	2,484.8	444.6	861.0	372.9					
Retail Operations (net)	38.8	(3.6)	64.7	25.4	64.8	193.1	97.8	115.9	228.3	396.0	408.8	389.7
Unrestricted Donations	625.7	640.5	659.4	617.2	928.2	832.3	934.6	1,060.0	1,075.0	1,280.0	1,325.6	1,234.5
Attendance	86,016	75,944	70,648	61,885	65,002	66,809	66,878	63,564	68,406	61,542	63,304	65,897
Ticket Price (Adult)	N/A	N/A	N/A	N/A	N/A	21.00	21.00	23.00	23.00	27.00	27.00	27.00
Employees (FTE's)	N/A	N/A	N/A	N/A	124	126	130	132	127	117	112	N/A

*Note 1 Prior to 2012 fiscal year ended February (March-February)
**Note 2 2012 Ten Months (converted to Calendar year (March-December))

The last 2 years show noticeable improvement. The "Yearly Operations" for 2016 & 2017 produced a surplus while also decreasing the endowment draw. The budget for 2018 has a surplus of \$79,500 while continuing to lower the endowment draw. The drawdown percentage for 2018 will be 5%. Retail operations have continued to improve over the last 4 years, and are budgeted at \$389,700 for this year. Unrestricted donations continue to remain strong.

EDUCATION & INTERPRETATION

"The tour was better than we expected. The interactive and hands-on activities truly enhanced the experience. We were surprised and delighted to be able to learn by doing"

The re-organization of the Education & Interpretation Division is complete. Each historic structure now has a Lead Interpreter and a Deputy Lead Interpreter. The management, scheduling, interpretive direction, and day-to-day operations are facilitated by this two-person team. This new structure will allow a nimble attitude to modifying the visitor experience as well as reduce the need for middle management oversight. On high volume days we schedule additional interpreters to be on site, as well as involving newly costumed administrative staff. The overall division is managed by **Nat Norwood and Darlee Snyder**. This new organizational model has already proven to provide an excellent, intimate, and more nuanced visitor experience, as well as provide a cost savings to our budget of approximately \$80k. The new craftsman spaces now feature spacious and comfortable rooms in which our interpreters can teach. We are also introducing more tables and chairs which can be used for interactive, immersive experiences.



➡ The **2018 DRAFT Horticulture Plan** has been produced and presented throughout the community (Garden Clubs, Old Salem residents). We continue to hold meetings and are compiling suggestions and comments to modify the plan. Although there has been some anxiety from the Old Salem Garden Club regarding the DRAFT plan, overall the responses have been positive.

➡ The **Boys School restoration** is almost complete and is scheduled for the public opening on *May 12th, at 9:00AM.*



➡ The **Winston Salem street construction work** is scheduled to begin in **May 2018**. Presently the contractor is conducting preliminary assessment of the affected areas. Councilmember Larson held a public session in Old Salem's Gray Auditorium so that community members could be informed on this project. Visit:

<http://www.cityofws.org/Departments/Transportation/Old-Salem-Infrastructure-Improvements>

➡ The **901 Building** has design proposals outlining 3 firm's scope and costs associated with the design of the interior. Review of these proposals will result in an awarded contract. As you may recall, the interior will contain educational spaces as well as visible collections storage. Phase I has been completed with the re-roofing and stabilization of the interior spaces.

MESDA

MESDA's Spring Design Seminar, "Stitching Southern Identity: Defining Female Culture in the Early South" was a success with sold-out participation. As part of the new school group orientation, an interpreter has been hired to work in the Moravian gallery, as well as present to the school groups on every high-volume day. In addition, after establishing the "Horton Maintenance Fund" in the last Board meeting, we have begun to detail the scope of the highest priority projects (re-roofing Horton, electrical work, and replacing the computer-regulating HVAC system). With funding from the MARPAT Foundation, MESDA's field research team has traveled to upcountry South Carolina and southeastern Virginia, adding nearly 200 objects to the MESDA Object Database. The incoming class for the 2018 MESDA Summer Institute is very strong with 11 students representing the University of Chicago, UNC, William & Mary, UVA, and Middle Tennessee State. This year's class will focus on the Low Country with an emphasis on African-American material culture and landscape.



ARCHAEOLOGY

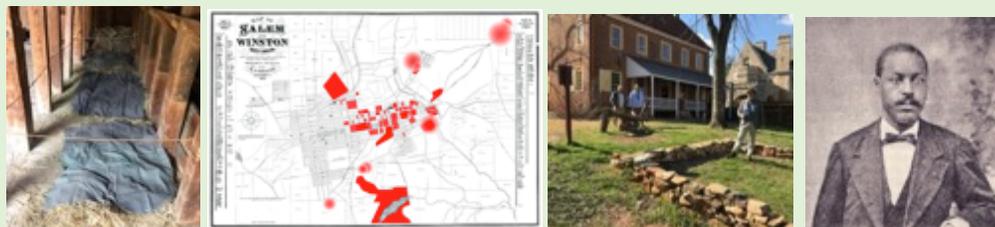
The strategic vision for the Old Salem Archaeology program is to grow on its previous successes while formulating a fully "public-facing" program. Traditional archaeology remains somewhat academic, while public archaeology utilizes the increasing public interest in the work through volunteering programs, social, media, and public events. Old Salem staff and BOT member **Dr. Ed Hill** spent a day with Montpelier's Director of Archaeology, Matt Reeves, discussing our next steps to growing the OS public archaeology program with consideration of sustained funding and FT staffing positions. We have solidified our contractual relationship with **Geoffrey Hughes**, PhD candidate, who has been working on Lot 38 pottery kiln site. Funding for this project has been provided through an OS BOT member. As part of a partnership with the North Carolina Digital Heritage Center, the NCDHC has agreed to accept Old Salem's archaeology reports into their digitization program. The reports will be made available on the Old Salem website.

We are producing a 5-year plan to achieve our public archaeology program with emphasis on the HIDDEN TOWN Project. The Archaeology program is now under the RESEARCH Division and managed by **Robert Leath**, VP of Research, Collections, and Archaeology.



HIDDEN TOWN PROJECT

The research for the Hidden Town Project continues at a consistent pace. We have two research interns working with **Martha Hartley**, Director of Moravian Research, investigating each building lot throughout the district to locate slave dwellings and biographical information about the enslaved. Old Salem will host its first SLAVE DWELLING PROJECT sleep-over in partnership with Walkertown High School. Numerous public presentations have taken place, and preparations for multiple events and research collaborations are in process. We continue to infuse our existing historic sites and interpretations with HT material. Text boxes, staging, and maps are all being displayed within the district. (IE: new research is showing that many travelers to the Tavern brought as many as 60 slaves traveling with them; therefore, the Tavern Barn now has sleeping spots interpreted as beds for the enslaved). Our research has found that the first African-American doctor in North Carolina was a man born into slavery in Salem (James Francis Shober b. 1853).



→ **HRC approved signage** construction has been complete and is now in use throughout the district. There are a few spots where the signs have to be modified to accommodate the streetscape. They are working well as wayfinding guides.



→ Following our Christmas **IT server** failure, **Gary Roher**, Manager of Information Technology, has investigated and re-configured various aspects of our server system, introducing new servers and “cloud” technology to be used as the backup option for Old Salem’s information.

→ **The Annex Bakery** move is currently underway. **V. Chair Mike Ernst** has been involved in the transition along with Retail/Bakery/Distribution team.

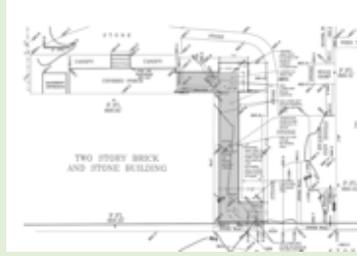


→ **Fencing** around St. Phillips Church has been completely replaced. Funding for this has been through the generosity of Doug & Jayne Williams. **Robbie King** managed the project.



UNIVERSAL ACCESS PROJECT

This new organizational-wide project has had significant accomplishments. **Jenny Garwood**, Chair of the UA Committee, and her team have been working hard at bringing this effort to our visitors. For example, **Robbie King**, Director of Interpreted Environments & Restoration, has been managing work on the Dr.’s House ADA ramp. It is progressing, with hopes that this ramp will be our first construction effort toward making our buildings accessible to all. In addition, every historic site now has a tactile box/bag for visitors who are mobility or cognitively impaired. Finally, we are working on a universal access visitor wayfinding map that will be printed on the opposite side of our present new visitor map.



HORTICULTURE & LANDSCAPE

The Horticulture Division has been without a lead since 2012. The 2018 effort is to spend a year understanding the needs and direction of the division so that we can make more informed choices going forward. Utilizing the DRAFT 2018 Horticulture plan (established Fall 2017), **Eric Jackson**, Head Gardner, is working with his staff and volunteers to prepare the gardens for the growing season. This plan was presented at the November Old Salem BOT meeting and a hard copy was given to each of you for review. The document contains the 8 goals for our 2018 season.

The greenhouse, which was not fully functioning, has been repaired and the Horticulture team is preparing our heirloom plants and pots for Main Street placement (just as we did in the 2017 season). The team continues to place seasonal arrangements at all visitor desks throughout the district using materials grown in the historic district. We will also be piloting something that Flora Ann Bynum herself recognized as inherently authentic – that is the naturalization of parts of the historic district.

Mr. Jackson is working with **Tabatha Renegar**, Manager of Volunteers, to organize a robust landscape volunteer crew who can help maintain the gardens and landscape. Currently, the horticulture crew consists of one FT and one PT staff member.

An analysis of hours needed to maintain the district is under review so that we can better understand the labor needs. As part of the divisional program analysis we are conducting, we have been looking at the financials of the annual garden workshops and of the Landscape Conference. All of the workshops were costing Old Salem money (no revenue), and the Landscape Conference regularly comp’d almost 50% of the attendees, resulting in the conference not covering its costs. Both of these events are being reviewed so that we can continuing them as signature, mission-centric programs that can pay for themselves.



➔ **Signature Days** are being piloted as a new type of signature event. We are selecting things that we normally do in our interpreted experiences, brand them, and market them as unique events.

18TH CENTURY BAKING AT THE TAVERN MUSEUM

WEEKLY WEDNESDAY BAKING IN WOOD-FIRED BRICK BEEHIVE OVEN

Sit right down and join the Sisters every Wednesday in the Tavern Museum kitchen to see the Tavern ovens, both restored and free, historically baked gingerbread, cakes and other treats for Tavern guests. The more questions you ask, the more fun you have! The restored 18th-century brick beehive oven is stacked with wood and heated down to hot coals. After the coals are removed, the oven is allowed to cool to the proper temperature before inserting loaves and trays. It is the heat from the hot bricks that bakes the delicious bread!

The Tavern was usually filled to the brim with transients (or "strangers" as the Moravians called them) and the tavern kitchen had to keep up with the food production to feed them all. The Moravian Church didn't want the tavern food production to interfere with other bakery sales within the town of Salem, so they made sure that the commercial sales never overlapped!

April 6, 1787 (Acht. Cook) "When Mr. Shum comes to the tavern it must be understood from the beginning that the gingerbread baked there is for the benefit of the tavern only". Vol. 1, p. 218b

May 14, 1787 "When Mr. Meyer leaves the



QUILTING BEE DAY AT THE JOHN VOGLER HOUSE

WEEKLY SATURDAY QUILTING

Take a seat, grab a needle and thread and follow in the legacy of Lucretia Maria Vogler Price (daughter of Christina and John Vogler) and her sister-in-law, who was married at the Vogler House) and join us for a weekly Quilting Bee at The John Vogler House every Saturday. Quilting Bees were times of social gathering and family discussion.

In many cases, quilts and needlework duties were shared activities between all house members (free and enslaved). Click this link for more information about our [Hidden Treasures Project] and the enslaved in Salem. Come and join this gathering as we discuss the quilting process, the history of the town of Salem as well as the complex narratives that joined to make it function and prosper.

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RESTORATION & INTERPRETED ENVIRONMENTS

Robbie King is managing several large projects throughout the district. He is facilitating the completion of the Boys' School renovation, guiding the design of the new Dr's House ADA ramp, overseeing selection of the design team for the 901 Building, as well as handling multiple district issues such as HRC responses, and fencing. In addition, Mr. King is compiling a master project list of interpreted streetscapes needs (staging, seating, tables etc.) that will expand our Activate Main Street program. On the horizon is the restoration of the Shultz Shoe Shop, continued painting of exterior surfaces, and interior work needed by the new interpretive model introduced in January 2018.



FACILITIES

Travis Jackson, Director of Facilities, is juggling quite a list of crises, short-term and long-term projects. In addition, daily maintenance of the structures within the historic district require Mr. Jackson's team to be constantly moving and addressing unusual occurrences. Such as the nesting of bats inside of the roof structure of the Visitors Center, infestation of carpenter bees eating away at our exterior restored woodwork, and failing HVAC systems. We are presently organizing and prioritizing a complete list of the HVAC systems in the district with the plan to begin replacing those in dire need. This division is responsible for the upkeep of the security, fire, and smoke alarm systems as well as the new digital and traditional key components. All of these systems have regular and consistent maintenance issues.

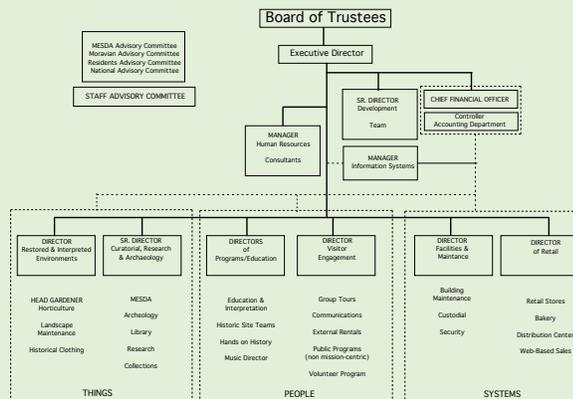


➔ **The Old Salem Music Program** is working on a 5-year plan to bring the Music Director's position, as well as the public events, into a sustainable financial model. The goal is to establish an endowment that covers the cost of the Music Director's salary and produce events whose income covers the cost of facilitation.



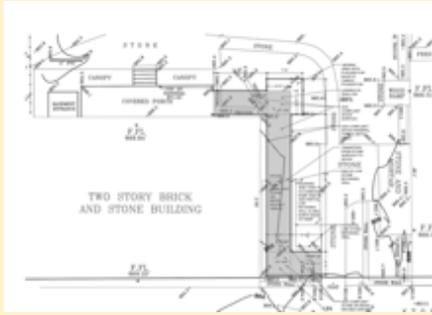
ORGANIZATIONAL & HUMAN RESOURCES

Since January **Cheryl Harry**, Manager of Human Resources and the payroll team have been re-writing job descriptions and placing our employees onto the Paycom system. They are establishing new time tracking and payroll systems. A monthly HR electronic newsletter is now being produced and emailed to all staff. Hiring process and staffing issues are now centralized under Mrs. Harry's direction. The leadership team continues to review the DRAFT organizational chart (below) to make sure that it reflects the staffing structure accurately. Presently the leadership team has been expanded to include all divisions and tasks at Old Salem. This regular staffing meeting has provided a collaborative environment for dealing with any procedural or staffing issues. Presently we have 86 full-time, 96 part-time employees with estimated 150 volunteers.



DRAFT #9 OLD SALEM ORGANIZATIONAL CHART 2018

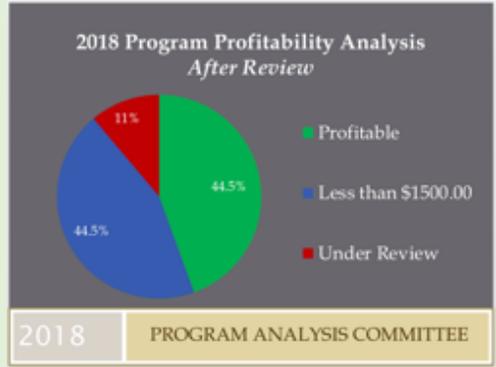
➡ **The Dr.'s House ADA ramp** is under design. Old Salem is working with a private funder, the architect, and the HRC in formulating the plans.



Reviews (1,104)

Traveler rating

<input type="checkbox"/> Excellent		695
<input type="checkbox"/> Very good		316
<input type="checkbox"/> Average		75
<input type="checkbox"/> Poor		15
<input type="checkbox"/> Terrible		3



2018 PROGRAM ANALYSIS COMMITTEE

2018 PROGRAM ANALYSIS COMMITTEE

Franklin Vagnone Meetings and Gatherings of Note

Winston-Salem City Council Public Hearing (John Larson) 1.2.18; New Winston Museum (Kathy Northington) 1.5.18; Old Salem Residents Advisory Meetings, Fourth House (monthly); Americana Week with MESDA (NYC) 1.16 – 19.18; Wake Forest Provost Welcoming Party for FDV 1.19.18; Mary Symington Club 1.24.18; New Benefactors Executive Committee mtgs, Fourth House, 1.24.18; South Ward Community Meeting (John Larson) 1.25.18; NC Folklife Institute, Sarah Bryan, 1.26.18; Home Moravian Church, Hidden Town presentation, 1.28.18; NC Museum of History presentation, 1.30.18; Moravian Advisory Committee, 2.1.18; John Larson, 2.2.18; Dr. Lorraine Sterritt (Salem College) 2.2.18; Nicholas Bragg, 2.5.18; Todd Savitt lecture introduction (Wake Forest/Hidden Town), 2.6.18; Cantey Alexander, BB&T, 2.7.18; Sorosis Club, Aurelia Gray Eller, 3.7.18; 2018 Insight opening greeting, 3.13.18; Riverrun Opening, 3.20.18; Matt Reeves, Montpelier Archaeology Director, 3.23.18; Robin and John Sullivan, Frances Beasley, 3.27.18; Dr. Eric Groce, Appalachian State University, 3.30.18; Old Salem Bond Community Meeting (John Larson), 4.3.18; Bruce Whipple in NYC, 4.4.18; Haywood Davis in NYC, 4.5.18; Cheyney McKnight in NYC, 1.5.18; Susan Haltom/Southern Garden History Society, 4.9.18; Lee Schwall/ Kathleen Keyser, 4.9.18; Centenary UM, Hidden Town, 4.11.18; Mr. & Mrs. Chalk (901 funding).