



FY 2025 Contract Scope of Work Response Burwell School Historic Site - Visitor Services & Operations

Organization Information		
Organization Name: Historic Hillsborough Commission (HHC)		
Contact Person and Title: Emma Vadney, Site Director		
Contact Person Email: burwellsc@gmail.com	Contact Person Phone: 919-732-7451	
Organization Street Address: 319 N Churton St		
City: Hillsborough	State: NC	ZIP Code: 27278
Organization's Annual Operating Budget: \$ 158,863.00		
General Contract Information		
Contract Name: Burwell School Historic Site – Visitor Services & Operations		
Month(s) or Date(s) in which Proposal Project/Services will take place: JULY 1st, 2024- JUNE 30th, 2025		
Outline/Overview of Scope of Work		
<p>The Historic Hillsborough Commission is a non-profit board appointed by – but not funded by – the Governor of North Carolina. The HHC, which celebrated its 60th anniversary in 2023, is fully committed to carrying out the tenets of the Scope of Work in the 2024-2025 Tourism Board contract. This action will involve the continued coordinated efforts of HHC members, community volunteers and partners, as well as paid staff dedicated to preserving this historic site for another 60 years and beyond.</p>		
<p>Please explain generally how the organization is going to perform the duties requested in the FY2025 Contract Scope of Work Update during Q1(July-Sept):</p> <ul style="list-style-type: none"> • Visitor Services: Continue as detailed in the <u>Outline/Overview of Job Tasks and Schedules</u>. • Staffing: Continue as detailed in the <u>Outline/Overview of Job Tasks and Schedules</u>. • Volunteers: Continue as detailed in the <u>Outline/Overview of Job Tasks and Schedules</u>. • Marketing: Continue as detailed in the <u>Outline/Overview of Job Tasks and Schedules</u>. • Budgeting: Continue as detailed in the <u>Outline/Overview of Job Tasks and Schedules</u>. • Events/Exhibits: <ul style="list-style-type: none"> ○ July, August, September TBD: Lunch and Learns – Burwell intends to offer these free virtual presentations on local history as a means of reaching our audience during the lazy summer months. ○ July 26, August 30, September 27: Last Friday Extended Hours – The Burwell School Historic Site will be offering extended hours and special guided tours in partnership with the Hillsborough Art Council's Last Friday events. These will be free and open to all. ○ August TBD: Star Party – Weather-permitting, the BSHS will hold its popular Star Party event on the site's front lawn. We hope to continue our partnership with local groups such as CHAOS and Whit's Custard to offer astronomical education and sweet treats to our guests. The BSHS also hopes to operate a bake sale with all proceeds benefitting the site. This event will be free and open to all. 		

- **September TBD: Tea with Lee** – Local celebrity author Lee Smith will visit Burwell for a teatime book reading and Q&A session. This event will be ticketed, with all proceeds benefitting the Burwell School.

Please explain generally how the organization is going to perform the duties requested in the FY2025 Contract Scope of Work Update during Q2 (Oct-Dec):

- Visitor Services: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Staffing: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Volunteers: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Marketing: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Budgeting: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Events/Exhibits:
 - **October: Annual Fund Campaign** – This fundraising campaign will kick off during this month. Led by the Development committee, the campaign will include mailings to commissioners, donors, and visitors. Burwell also advertises the annual fund campaign on our website, social media, and email marketing platforms.
 - **October TBD: Fall Fest** – Although our 2023 Fall Fest was victim to a tropical storm, we plan to build on its relative success and see our vision fully recognized in 2024. We will partner with local vendors, farmers, etc. to offer delicious baked goods, local crafts, fall activities, and more. This event will be free and open to the public.
 - **November 30: Small Business Saturday** – Capitalizing on the success of past years' events, the BSHS gift shop will again partner with our local agencies and small businesses to promote small business and tourism in Hillsborough.
 - **December 3: #GivingTuesday** – This mini fundraising campaign will again be promoted via our website and social media.
 - **December TBD: Hillsborough Holiday Parade** – Burwell is fortunate enough to have the Hillsborough Holiday Parade go right past our front lawn. We successfully operated a cookies and cocoa stand in 2023 in an effort to connect with the community and we intend to repeat this in 2024.

Please explain generally how the organization is going to perform the duties requested in the FY2025 Contract Scope of Work Update during Q3 (Jan-March):

- Visitor Services: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Staffing: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Volunteers: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Marketing: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Budgeting: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Events/Exhibits:
 - **TBD: Revolutionary War Living History Day** – The BSHS will again participate in the annual town-wide Rev War Day, hosting interpreters such as Camp Flintlock and offering special tours free of charge to all visitors.
 - **February TBD: Black History Month Programming** – In honor of Black History Month, the BSHS will present a minimum of one educational program. This event will be free and open to the public. We hope to build on our past collaborations with Mount Bright Baptist Church in presenting this program.

- **March TBD: Women’s History Month Programming** – In honor of Women’s History Month, the BSHS will present a minimum of one educational program. This event will be free and open to the public.

Please explain generally how the organization is going to perform the duties requested in the FY2025 Contract Scope of Work Update during Q4 (April-June):

- Visitor Services: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Staffing: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Volunteers: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Marketing: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Budgeting: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Events/Exhibits:
 - **TBD: Annual Auction Gala** – Our largest fundraiser of the year features delicious food and drink, a live and silent auction, and marvelous theming. This event will be ticketed and limited to attendees 21 and older.
 - **TBD: May Volunteer Appreciation Event** – A free event to honor the many community volunteers and partners of the Burwell School.

Outline/Overview of Job Tasks and Schedules

Please explain generally how the organization plans to accomplish all goals associated with the scope of work, including but not limited to, marketing, hiring, volunteer recruitment, exhibit development, event tasks, etc.

1. Visitor Services
 - a. Admission to the Burwell School Historic Site (BSHS) will continue to be free for walk-in visitors. Donations are always encouraged.
 - b. The site is staffed by our Visitor Services Coordinator (VSC) and/or Site Director (SD) during the week, with paid docent staffing during weekends.
 - c. Staff and volunteers will continue to refer all visitors to our site to our local partner agencies (i.e. The Alliance for Historic Hillsborough, Orange County Historical Museum, Hillsborough Arts Council, etc.) Relevant local visitor services materials (i.e. brochures, maps, event listings, etc.) will be displayed on-site as a resource for visitors and distributed through monthly email marketing.
 - d. Group tours, Girl Scout Merit Badge groups, and tours scheduled outside of normal business hours will incur a small fee based on the specifics of each group. These tours are directed by the VSC, with assistance from the SD and trained community volunteers. As of FY2023, the Burwell School no longer charges for school trips, to keep with our mission of education.
 - e. Normal Hours of Operation will continue to be Wednesday – Saturday from 11:00am to 4:00pm and Sunday from 1:00pm to 4:00pm. The BSHS will be closed during designated holidays, as well as a longer closure from mid-December through the New Year in observance of several holidays. At the recommendation of the HTB, the BSHS remained open for normal business hours during the winter months again during FY24, incurring

an estimated additional cost of \$5,000. We will continue to operate with normal business hours in the winter months in FY25, anticipating similar costs.

- f. All weekday tours will remain self-guided, unless by advance appointment with the VSC. Guided docent tours remain available upon request every Saturday and Sunday during normal operating hours.
- g. The BSHS will extend hours of operation in conjunction with the HAC's Last Friday events and the AHH's Rev War Day.

2. Staffing

- a. Site Director (FULL-TIME for FY25) – The Site Director handles daily site operations, including but not limited to marketing, scheduling of staff, administrative tasks for the Commission, report preparation, grant writing, and community partnerships. The SD also meets regularly with staff, commissioners, and partners. Prior to 2019, this position was full-time. With the generosity of the HTB, the Burwell School hired a full-time Site Director in FY24. It is in the best interest of the BSHS that this position remains at full-time.
- b. Financial Coordinator (PART-TIME for FY25) – The Finance Coordinator is responsible for the proper financial management of the BSHS, to include payroll, tax filings and payments, bill payments, reports, Sales & Use Tax payments, etc. The FC will continue to work closely with our CPA, chair, treasurer, finance committee, and Site Director to ensure all financial tasks are handled appropriately and transparently, maintain sound financial management practices, assure a system of checks and balances, and prepare for both monthly CPA reconciliations and official financial audits every 3 years. The FC will meet monthly with the treasurer and finance committee and prepare monthly Profit & Loss statements and balance statements. They will report directly to the HHC chair.
- c. Visitor Services and Historic Coordinator (PART-TIME for FY25) – The BSHS is fortunate enough to have found a staff member capable of taking on the responsibilities of the VSC and HC. In their capacity as VSC, this position oversees volunteers and docents, ensuring all Burwell events and special tours are covered. The VSC also supervises the gift shop. As Historic Coordinator, this position is responsible for presenting an accurate and respectful interpretation of the history of the site. The HC meets regularly with the Research Committee and oversees exhibits, programming, tour scripts, and docent training.
- d. Docents (PART-TIME for FY25) – Our staff of docents operates the site on the weekends, greeting visitors, offering guided tours upon request, facilitating sales at the gift shop, and referring guests to our partners around town. Upon request, they also assist with special events and tours.

3. Financial Management

- a. Thanks to the generosity of the HTB, the Financial Coordinator has assumed the daily financial transactions of the BSHS, with oversight from the chair, the treasurer, the finance committee, and our CPA. We will continue to work with a third-party firm to balance our books monthly to ensure all revenues match expenses.

4. Events/Exhibits

- a. The site will coordinate at least five (5) special events per year during or outside of normal business hours. This will include extended hours of operation during the

Hillsborough Arts Council's Last Friday events, as well as the town's Revolutionary War Day event.

- b. We will continue to offer a minimum of 1 exhibit complementing the events offered throughout the year.
- c. The Site Director, HHC chair, or other representative will present information to the Hillsborough Tourism Board at their quarterly meetings to include upcoming events, exhibits, and any planned improvements or changes to the BSHS.
- d. Each event will have a specialized marketing plan created for and targeted towards the specific event and its likely audience.

5. Marketing

- a. Rack Cards: The HHC will continue to produce rack cards highlighting important aspects of the BSHS, including the logo of the Hillsborough Tourism Board. Additional brochures or flyers will be provided for special events as needed. Copies of these rack cards and/or flyers will be shared with the Town of Hillsborough, the Hillsborough Visitors Center, the Orange County Historical Museum, and other relevant local entities.
- b. Email Marketing: The HHC will continue to update and communicate with its extensive email distribution list as a cost-effective means of raising awareness of upcoming events and exhibits, as well as other BSHS happenings. Where practical and logical, the Hillsborough Tourism Board logo will be included on these communications, particularly those where sponsors are listed.
- c. Website: The HHC will continue to offer a robust website that is updated often, highlighting upcoming events, site history, and volunteer opportunities. The site also includes the "People of the Past" research database, which is currently under construction, receiving a much-needed update. This free database provides research regarding the Burwell family, students, free and enslaved people of color, and historic patrons of the School. We will continue to offer interactive virtual exhibits, such as our popular "Historical Comic Book" series free of charge, as well as our online gift shop and event registration.
- d. Social Media: The HHC will continue to utilize Facebook and Instagram to promote the site and its events. Our Site Director has linked the accounts via Meta Business Suite so that they function in tandem. In FY24, our SD and VSC created a TikTok account for the BSHS to share historical content with a variety of audiences. We hope to resume content creation on this account in FY25.
- e. Print/Electronic/Radio Marketing: The HHC will continue to submit press releases to local area news sources to distribute to readers. The HHC also hopes to collaborate with local radio stations.
- f. Marketing information will be presented quarterly by the Site Director, chair, or other representative to the HTB.

6. Volunteers

- a. Recruitment: Under the supervision of the HHC Chair, the Site Director, and the Visitor Services Coordinator, the HHC recruits volunteers from the community to serve in a variety of capacities, including event assistance, special projects, etc. All volunteers receive a complete background check before working with the Commission.
- b. Fill-in Weekday Greeters: If staff is unavailable or needs additional assistance during group tours, trained volunteer greeters will be called upon to assist. Greeters are trained

by the Visitor Services Coordinator and will welcome guests, answer general questions, maintain visitor logs during their shifts, and refer visitors to our partner agencies.

- c. Additional Volunteers: Drawing from the community and former commissioners, the HHC utilizes volunteers on standing committees including, but not limited to, research, events, etc.

Please explain how the organization is going to fundraise and build sustainability in FY25:

1. Fundraising

- a. Burwell has seen success hosting a fall fundraising event in past years, so we plan to continue this in FY25. Our 2023 Fall Fest promised to be a great fundraiser, but a tropical storm put a slight damper on things. Despite the weather, we were able to host a successful event, and intend to hold a Fall Festival again in FY25 (with a rain date this time).
- b. The Burwell Annual Fund campaign will continue to serve as our major year-round fundraising campaign in FY25. We hope to build on our relationships with existing donors while reaching out to new potential donors through innovative marketing ideas. In FY25, we aim to explore new donor demographics, particularly connecting with young families through fun educational programming for children.
- c. In FY24, our Site Director created and launched the Burwell Sustainer Program, an easy-to-use program that allows donors to give monthly to the BSHS through a one-time sign-up. Sustainers receive a Sustainer bumper sticker as well as priority access to all ticketed Burwell events. We plan to continue marketing this program in FY25.
- d. The Burwell School Auction Gala will continue to serve as our primary fundraising event in FY25. We hope to build on existing relationships with community partners, donors, and sponsors and reach out to new potential donors in order to expand on past successes.

2. Sustainability

- a. With the hiring of a full-time Site Director and part-time Visitor Services Coordinator, the Burwell School has made strides towards financial self-sufficiency in FY24. We plan to continue building on the success of our paid group tours, Girl Scout programs, and gift shop in FY25.
- b. Our Site Director intends to continue pursuing capacity-building grants in FY25. We also intend to continue exploring corporate sponsorships for the Burwell School.
- c. Under the leadership of HHC Chair Matt Hughes, the Commission has established a Financial Strategic Planning Committee, whose purpose will be to craft a long-term financial plan to move the Burwell School closer towards financial self-sufficiency.

Please explain how the organization plan to grow tourism in Hillsborough in FY25:

1. Programs

- a. The Burwell School will continue offering programs that create experiences intended to draw in visitors from surrounding areas. One such example was our Black History Month

program in FY24. We brought in a scholar from California to present a program on Elizabeth Keckly. This type of event is unique and brought visitors from around the Triangle. We hope to build on this success and offer

Marketing Plan

Please explain generally how the organization is going to provide the minimum requested marketing materials as well as any additional marketing and materials that will ensure the events/programs/projects/service/historic sites' success for Q1(July-Sept):

- The Site Director produces a marketing plan for each quarterly event, generally those that are part of our designated annual or semi-annual programming focus. Each marketing plan includes the production of flyers, social media posts, email marketing, press releases, and event listings on our website and other relevant online and print calendars.
- Where logical and appropriate, the logo for the HTB is included on these items.
- Smaller events are promoted via flyers, social media posts, and relevant event listings on our website.
- For specific event information for this quarter, please see the corresponding quarter section above in the Outline/Overview Scope of Work.

Please explain generally how the organization is going to provide the minimum requested marketing materials as well as any additional marketing and materials that will ensure the events/programs/projects/service/historic sites' success for Q2 (Oct-Dec):

- The Site Director produces a marketing plan for each quarterly event, generally those that are part of our designated annual or semi-annual programming focus. Each marketing plan includes the production of flyers, social media posts, email marketing, press releases, and event listings on our website and other relevant online and print calendars.
- Where logical and appropriate, the logo for the HTB is included on these items.
- Smaller events are promoted via flyers, social media posts, and relevant event listings on our website.
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Please explain generally how the organization is going to provide the minimum requested marketing materials as well as any additional marketing and materials that will ensure the events/programs/projects/service/historic sites' success for Q3 (Jan-March):

- The Site Director produces a marketing plan for each quarterly event, generally those that are part of our designated annual or semi-annual programming focus. Each marketing plan includes the production of flyers, social media posts, email marketing, press releases, and event listings on our website and other relevant online and print calendars.
- Where logical and appropriate, the logo for the HTB is included on these items.
- Smaller events are promoted via flyers, social media posts, and relevant event listings on our website.
- For specific event information for this quarter, please see the corresponding quarter section above in the Outline/Overview Scope of Work.

Please explain generally how the organization is going to provide the minimum requested marketing materials as well as any additional marketing and materials that will ensure the events/programs/projects/service/historic sites' success for Q4 (April-June):

- The Site Director produces a marketing plan for each quarterly event, generally those that are part of our designated annual or semi-annual programming focus. Each marketing plan includes

the production of flyers, social media posts, email marketing, press releases, and event listings on our website and other relevant online and print calendars.

- Where logical and appropriate, the logo for the HTB is included on these items.
- Smaller events are promoted via flyers, social media posts, and relevant event listings on our website.
- For specific event information for this quarter, please see the corresponding quarter section above in the Outline/Overview Scope of Work.

Signatures

I hereby certify that the information contained in this proposal is true and accurate to the best of my knowledge and that I have reviewed the Town of Hillsborough's Non-profit Guidelines and our organization is in compliance.

EXECUTIVE DIRECTOR

Signature: 
Emma Vadney (Mar 25, 2024 19:56 EDT)

Date: **03/25/2024**

Printed Name: **Emma Vadney**

BOARD CHAIRPERSON

Signature: 
Matt Hughes (Mar 26, 2024 11:54 EDT)

Date: **03/26/2024**

Printed Name: **Matt Hughes**

GRANT CONTACT PERSON (if different than Executive Director)

Signature:

Date:

Printed Name:

Detailed Proposed Budget

a. Item	b. Amount Needed via Contract Funding in FY25 (for each item)	c. Amount Contributed by Organization (for each item)	d. Other Funding Sources		e. Total Contract Budget (add columns b-d)
			Amount	Source	
i.e. Personnel Costs- .5 FTE- Part Time Coordinator (10 hours p/w)	Ex: \$6,500	Ex: \$1,000	Ex: \$500	Non-profit Grant	\$8,000
1.Personnel Expense-7000 a) 7001-Site Coordinator (FULL-TIME in FY25) @ 30 hours p/w @ \$21= \$32,760.00 b) 7010-Finance Director @ 11 hours p/w @ \$21= \$12,012.00 c) 7002-Visitor & Historical Services Coordinator @ 25 hours p/w @ \$18= \$23,400.00 d) 7004-Docent Wages @ 8 hours for 50 weeks @ \$16.60= \$6,640.00 e) 7006-Benefits (Site Coordinator Only) 15% x wages medical stipend= \$4,914.00 f) 7007-Payroll Tax -Company Paid= \$9,600.00 g) 7008-Payroll Service Fee = \$1,100.00	\$70,000.00	\$20,453.00	\$0.00	N/A	\$90,453.00

<p>2.General Admin-8100</p> <p>8101-Advertising= \$3,000.00 8102-Computer/Software Maintenance= \$1,000.00 8111-Printing/Copying= \$1,000.00 8112-Office Equipment= \$500.00 8113-Office Supplies= \$1,000.00 8114-Newspaper= \$24.00 8116-Staff Expenses=\$200.00 8118-Charitable Solicitation License Renewal Fee= \$53.00 8120-Professional Fees= \$3,900.00 (CPA-\$200 p/m + \$1500 990 prep/filing)</p>	\$0.00	\$10,677.00	\$0.00	N/A	\$10,677.00
<p>3.Fundraising Costs-8200</p> <p>8201-Auction= \$15,000.00 8202-Fall Fest= \$2,000.00 8203-Other Events= \$1,000.00</p>	\$0.00	\$18,000.00	\$0.00	N/A	\$18,000.00
<p>4.Programs-8300</p> <p>8301-Exhibits= \$500.00 8302-Research/Collections= \$900.00 8303-Catelogit= \$450.00 8305-Ancestry= \$300.00 8307-Newspapers.com= \$150.00 8308-Events(non-fundraising)=\$500.00</p>	\$0.00	\$2,800.00	\$0.00	N/A	\$2,800.00

5.Gift Shop-8400 8401-Cost of Goods Sold= \$500.00 8402-Sales Tax Due (pass thru only)= \$75.00	\$0.00	\$575.00	\$0.00	N/A	\$575.00
6.Facility (Utilities & Maintenance)-8500 8501-Electricity/Gas= \$6,500.00 8502-Water/Sewer= \$1,000.00 8503-Telephone/Internet= \$2,300.00 8504-Groundskeeping= \$9,600.00 8505-Pest Control= \$500.00 8506-Site Maintenance= \$3,000.00 8508-Safety/Security (Alarm System)= \$500.00 8509-Property Tax= \$450.00 8510-Insurance= \$10,000.00	\$0.00	\$21,850.00	\$12,000.00	Orange County Outside Agency Grant applied for	\$33,850.00
7.Other Expenses-8600 8603-Bank charges/PO Box= \$50.00 8605-Merchant Processing Fees= \$1,000.00 8606-Storage Unit Rental= \$1,320.00 8607-Misc.= \$150.00	\$0.0	\$2,520.00	\$0.0	N/A	\$2,520.00
TOTALS (sum of each column)	\$70,000.00	\$76,875.00	\$12,000.00		\$158,875.00
** PLEASE ADD ROWS AND/OR PROVIDE ADDITIONAL SHEETS IF THERE IS NOT ENOUGH ROOM TO ACCOMMODATE YOUR FULL BUDGET **					