



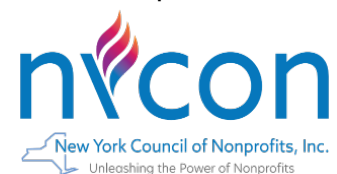
# Theodore Roosevelt Inaugural Site Foundation

## Strategic Planning 2025-2028

### Work Plan



Prepared with assistance of  
the New York Council of  
Nonprofits



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# Theodore Roosevelt Inaugural Site Foundation

## I. History and Operations

The Theodore Roosevelt Inaugural Site Foundation is a private 501(c)3 charitable organization founded in 1968 to operate, maintain, and interpret the historic home where Theodore Roosevelt took the Presidential Oath of Office following the assassination of President William McKinley in 1901. The home and site are units of the National Park Service, the only NPS location in Western New York, and are managed by the Foundation through a cooperative agreement. The home is a Greek Revival-style house that dates to the 1840s when it was originally constructed as the Officer's Quarters for the Poinsett Barracks. Named after Secretary of War, Joel Poinsett, the location was also known as the Buffalo Barracks. The home was converted into a private house in the 1850s by former Buffalo Mayor Joseph Masten and it eventually became the home of Ansley Wilcox and his second wife, Mary Grace (Rumsey) Wilcox.

While the Site is named for its most important event, President Theodore Roosevelt's unexpected inauguration, its collection and history are far more extensive. The collection includes objects and documents known to be associated with TR's 1901 inauguration and the Wilcox family residence at the time of TR's inauguration as well as his life, and specifically, his presidency. It also includes objects and documents related to President William McKinley's assassination and death, which resulted in TR's succeeding him. The collection also includes items from the Pan-American Exposition, a world's fair held in Buffalo from May 1 through November 2, 1901, which was visited by more than 8,000,000 people.

The house and site have at various times in their history been in danger of being razed and replaced with modern structures, until efforts of local politicians and volunteers rallied in the 1960s to save the home and secure it a place in the ranks of National Park Service sites. After which the foundation was created in to manage and preserve it. This is altogether fitting as it was President Theodore Roosevelt himself who laid the groundwork for later advances in federal policy that led to a robust National Park system in the United States. Theodore Roosevelt, well known for his commitment to conservation of land and wildlife for public enjoyment, signed into law the 1906 Antiquities Act, giving the president the power to protect cultural and natural resources on public land.

The TR Site was added to the National Registry of Historic Places on November 2, 1966 and was the first National Landmark in Buffalo and Erie County. Enabling legislation was signed into law in 1980 identifying the TRIS Foundation as an external partner of the NPS who maintains, operates, and interprets the TR Site through a cooperative agreement. That same enabling legislation also includes verbiage indicating that the Department of the Interior may provide up to 2/3rds of the Site's operating budget.

## **II. Overview of the Planning Process**

In January 2025, the TRIS Foundation Board of Trustees engaged in a day-long Board Retreat off-site to discuss future planning and goals for the organization. Prior to this retreat, Trustees reviewed institutional history, past strategic planning processes, and current trends and opportunities. It was agreed that the Foundation would engage in a new strategic planning process.

In the Spring of 2025, the TRIS Foundation embarked upon the new strategic planning process to lay the groundwork for the organization's future. The planning process included input from board members, staff and volunteers through an online survey that provided the opportunity for participants to reflect upon the organization's mission and values; develop a vision for the organization; undertake an assessment of the organization's internal strengths and weaknesses as well as external opportunities and threats; and identify action items to accomplish that vision.

The full survey report was shared with members of the board prior to a retreat session for them and key staff held on May 10, 2025, led by Barbara Paxton. This session provided participants the opportunity to identify priorities and set TRIS Foundation's course for the next three to five years.

### III. Key Strategic Issues, Goals & Strategies:

#### 1) Collections Care and Management

*Goal: We will establish and continuously improve upon the policies and practices needed to provide responsible collection stewardship.*

- 1.1 Create/strengthen collections policies
- 1.2 Make the collections more available for research and exhibit
- 1.3 Create a plan for the items in the Costume Resource Center
- 1.4 Put in place emergency preparedness procedures

#### 2) Programs and Services/Community Involvement

*Goal: We will develop mission driven programming to increase community engagement, memberships, and financial support, and also create community involvement.*

- 2.1 Serve as a platform and presence in the community
- 2.2 Ensure programming communicates that the organization is more than just the building and TR's inauguration
- 2.3 Increase diversity and accessibility of programming to engage the broader community
- 2.4 Commemorate America 250, Pan Am 125, anniversary of the Inauguration

#### 3) Revenue Generation and Fundraising

*Goal: Strengthen organizational revenue model to renovate the building, support new programming and community involvement*

- 3.1 Strengthen fundraising individual and institutional donors
- 3.2 Increase earned revenue
- 3.3 Assess membership



## **IV. Mission and Vision**

### **MISSION**

#### **Old:**

The Theodore Roosevelt Inaugural National Historic Site preserves the home in Buffalo, New York, where Theodore Roosevelt became the 26th President of the United States in 1901; promotes opportunities for the public to understand the historic events surrounding the inauguration; and fosters discussion of Roosevelt, his presidency, and his legacy.

#### **Proposed:**

Our mission is to advance Theodore Roosevelt's legacy of leadership by inspiring civic engagement and preserving the site of his unexpected 1901 inauguration in Buffalo, New York, which sparked the birth of the modern presidency.

## V. Environmental Analysis (S.W.O.T.)

Strengths	Weaknesses
<p><b>Staff &amp; Board</b></p> <ul style="list-style-type: none"> <li>Strong, professional, dedicated staff &amp; leadership</li> <li>Longevity &amp; passion among staff members</li> </ul> <p><b>Collections – Strengths</b></p> <ul style="list-style-type: none"> <li>Political Cartoons</li> <li>Local newspapers</li> <li>Pan-American Exposition</li> <li>Wilcox Family</li> </ul> <p><b>Finances</b></p> <ul style="list-style-type: none"> <li>Private Foundation – not entirely reliant on NPS</li> </ul> <p><b>History</b></p> <ul style="list-style-type: none"> <li>Theodore Roosevelt is a well-known president, relevant to today</li> </ul> <p><b>National Park Service</b></p> <ul style="list-style-type: none"> <li>Private/Public Partnership</li> <li>Relationship &amp; funding from NPS</li> <li>Access to experts</li> <li>Only NPS site in WNY</li> </ul> <p><b>Origin Story</b></p> <ul style="list-style-type: none"> <li>A dedicated group saved the building</li> <li>Women led</li> </ul> <p><b>Technology</b></p> <ul style="list-style-type: none"> <li>Technology for visitors is recent</li> </ul>	<p><b>Programs</b></p> <ul style="list-style-type: none"> <li>Stagnant exhibits and visitor tour</li> <li>No self-guided tour</li> </ul> <p><b>Brand and Image</b></p> <ul style="list-style-type: none"> <li>Public's main association is Victorian Christmas</li> </ul> <p><b>Costumes</b></p> <ul style="list-style-type: none"> <li>Not used; no plan for future</li> </ul> <p><b>Finances</b></p> <ul style="list-style-type: none"> <li>Uncertainty of federal money</li> <li>Heavy reliance on admissions, grants and donations</li> </ul> <p><b>Staff, Volunteers and Board</b></p> <ul style="list-style-type: none"> <li>Board membership diversity is lacking</li> <li>Not enough volunteers/docents</li> </ul> <p><b>Technology</b></p> <ul style="list-style-type: none"> <li>Internal infrastructure old and prone to failure</li> <li>Some cyber protections have been put in place but there is a general need for better and more robust cyber emergency preparedness</li> </ul>

Opportunities	Threats
<p><b>Programming, Education &amp; Youth Engagement</b></p> <ul style="list-style-type: none"> <li>• More engagement with schools and educational institutions.</li> <li>• Develop docents who could visit schools to bring history to life</li> <li>• Increasing interest in civic education</li> <li>• Leverage TR's views on conservation, leadership, equity, and reform to offer avenues for exploring modern issues through historical context</li> </ul> <p><b>Celebration Year</b></p> <ul style="list-style-type: none"> <li>• Galvanize around Pan Am 125 and America 250 both in 2026; bicentennial of the Site/Buffalo Barracks and the City of Buffalo in 2030s</li> <li>• Lay foundation for future targeted campaign(s)</li> <li>• Bicentennial of the Erie Canal</li> </ul> <p><b>Digital &amp; Online Engagement</b></p> <ul style="list-style-type: none"> <li>• Increasing collections engagement via online platforms</li> <li>• Investment in more digital engagement and virtual programs</li> </ul>	<p><b>Funding</b></p> <ul style="list-style-type: none"> <li>• Potential uncertainty with federal funding</li> <li>• Potential risk of alienating specific groups with evolution of mission and priorities</li> </ul> <p><b>Infrastructure</b></p> <ul style="list-style-type: none"> <li>• Ongoing preservation maintenance of the Wilcox House</li> <li>• Collapse of aged computer equipment</li> </ul> <p><b>Staff &amp; Volunteers</b></p> <ul style="list-style-type: none"> <li>• Leadership succession planning</li> <li>• Changes in volunteership</li> <li>• Finding the docents</li> </ul>



## VI. Strategic Work Plan

### 1) Collections Care and Management

*Goal: We will establish and continuously improve upon the policies and practices needed to provide responsible collection stewardship.*

Strategy	Objective
1.1 Create/ strengthen collections policies	1.1.1 Expand digitization of and access to the collection
	1.1.2 Reassess collection items for consistency with TRIS's mission
	1.1.3 Create a system for evaluating and prioritizing TRIS's holdings
	1.1.4 Create a conservation "wish list"
	1.1.5 Create a collections development plan – with active collecting goals going forward
1.2 Make the collections more available for research and exhibit	1.2.1 Promote the collection as a research tool for a side range of audiences
	1.2.2 Use collection pieces in exhibits
	1.2.3 Leveraging and exploring partnerships with other similar collecting agencies
1.3 Create a plan for the items in the Costume Resource Center	1.3.1 Develop a plan for the proper rehousing and reinterpretation of the Costume Resource Center
	1.3.2 Create an outreach plan for the constituents/volunteers who have devoted themselves to the care of these items
1.4 Put in place emergency preparedness procedures	1.4.1 Develop an Emergency Preparedness and Response Plan.
	1.4.2 Ensure emergency supplies, including plastic sheeting to cover collections in the event of a leak, are stocked and kept in an accessible area on site.
	1.4.3 Train all staff annually (or more often as needed) on emergency procedures.

## 2) Programs and Services/Community Involvement

*Goal: We will develop mission driven programming to increase community engagement, memberships, and financial support, and also create community involvement.*

Strategy	Objective
2.1 Serve as a platform and presence in the community	2.1.1 Create a plan to be proactive in developing relations with other local organizations to reach a wider audience
	2.1.2 Foster civics-based programming opportunities and joint collaboratives that have an impact in the local community
	2.1.3 Ensure future programs and endeavors are mission-oriented and consistently branded as such
2.2 Ensure programming communicates that the organization is more than just the building and TR's inauguration	2.2.1 Evaluate current exhibits for accuracy, sensitivity
	2.2.2 Expand upon programming that reflects TR's various interests and relate them to today's challenges
	2.2.3 Evaluate presenting programs on other topics – the story of saving the house, the Wilcox's, etc.
2.3 Increase diversity and accessibility of programming to engage the broader community	2.3.1 Develop new, online and year-round programming
	2.3.2 Create a self-guided tour
	2.3.3 Create a volunteer engagement/ recruitment plan
	2.3.4 Create programming to engage families, e.g. summer camp
	2.3.5 Create opportunities and collaborations enabling traveling and rotating exhibits
	2.3.6 Continue to work towards more inclusive and accessible programming, tours, and all-around user-friendly site visits
2.4 Commemorate America 250, Pan Am 125, anniversary of the Inauguration	2.4.1 Create Board/Staff Committee to plan activities
	2.4.2 Work with other Buffalo and TR organizations to coordinate
	2.4.3 Create plan to reach out to past board/staff/volunteers and civic leaders to involve them

### 3) Revenue Generation and Fundraising

*Goal: Strengthen organizational revenue model to renovate the building, support new programming and community involvement.*

Strategy	Objective
3.1 Strengthen fundraising individual and institutional donors	3.1.1 Research new foundations; create grant plan
	3.1.2 Create annual fundraising plan and complete a comprehensive fundraising capacity study (2027-2028)
	3.1.3 Create an annual fund appeal for individual donors
	3.1.4 Define and develop an individual giving program and intentional engagement of donors as stakeholders
	3.1.5 Continue developing and increasing planned giving opportunities
	3.1.6 Continue cultivating a mutually beneficial relationship with the National Park Service
3.2 Increase earned revenue	3.2.1 Increase attendance rates and admission numbers
	3.2.2 Create and execute a plan to increase rentals of the Gallery Space and Conference Room
	3.2.3 Create corporate sponsorship opportunities
	3.2.4 Increase gift shop sales by leveraging new and existing merchandise and sale opportunities/events
3.3 Assess membership	3.3.3 Evaluate current membership program
	3.3.4 Assess benefits for current members