



# **Sycamore Shoals State Historic Park Business & Management Plan**

# Table of Contents

- Mission Statement.....03
- Goals, Objectives & Action Plans.....04
- Park Overview..... 15
- Park & Operations Assessment.....18
  - Park Inventory and Facility Assessment.....19
  - Operational Assessment.....20
  - Financial Performance Assessment.....22
  - Competitors.....24
- Customer Service & Satisfaction Plan.....25
- Financial Pro Forma.....26
- Park Map.....27
- Organizational Chart.....29

## Mission Statement

The park's mission is to protect and preserve the unique examples of natural and cultural history and the scenic areas at Sycamore Shoals State Historic Area, the John and Landon Carter Mansion, and Sabine Hill while providing opportunities for recreation and education in a safe environment. We emphasize the presentation of the stories which tell the significant historic events that happened at these three sites through a variety of quality, well-planned and well-managed activities, programs, interpretive exhibits, and facilities through which the visitor will gain both educational values and quality experiences.

(SSSP MDS, January 2013-revised November 2014)



Objective 2: Plans for controlling Personnel expenses: list \$ or % of revenue; unless noted otherwise, all objectives are for completion by end of FY14-15.

Action plans:

Limit overtime for full time staff

Request assistance from volunteers and Friends group to accomplish necessary tasks, particularly during special events, which cannot be accomplished by full time staff within their allotted work hours.

Objective 3: Plans for controlling Other expenses. These action plans would include preventative maintenance, limited renovations, any savings from LEAN or energy audits; list \$ or % of revenue; unless noted otherwise, all objectives are for completion by end of FY14-15.

Action plans: :

- 1) Reduce utility operational costs by using grant funding to purchase and install high efficiency lighting, using Energy Star rated appliances when replaced old refrigerators, ranges and other electrical appliances in all buildings.
- 2) Perform semi-annually preventive maintenance for HVAC units to insure peak performance and to extend the life span of the units. Change filters in all HVAC units quarterly.
- 3) Perform quarterly cleaning of lighting and electrical fixtures to obtain peak performance and reduce heat loads.
- 4) Install new UV film on all windows in lobby of Visitors Center
- 5) Program Visitors Center HVAC units with nighttime setback temperatures. Higher in the summer and lower in the winter.
- 6) Only purchase goods & services that directly apply to safety considerations and the operational needs of our three sites.
- 7) Consistently get bids on every purchase to obtain the best possible price

## **Goal 2: Revenue Growth**

**See Financial Pro forma Section for revenue objectives.** Revenues can improve with increased marketing and planned events (see Goal 3) throughout the year. *Top priority is increasing revenue in the Gift Shop* by enhancing purchases through marketing, packaging and special events. However, the park offers many different avenues for revenue growth and those should be planned for/implemented as well.

Other plans to increase revenues should look at prices, new products, activities and services that can be offered and new customers to call on.

Objective 1: Plans to increase picnic shelter and Gathering Place (community room) revenue:

Action plans:

Request funding to advertise both of these services

Request funding to provide restrooms and a playground at the picnic shelters

Objective 2: Plans to increase new sources of revenue:

Action plans: What is to be done; frequency; by whom.

Increase booth fees for events involving vendors & food services

Implement a small charge for tours of the Carter Mansion and Sabine Hill

Implement a fee to host competitive events such as track meets and cyclocross

Advertise availability of Gathering Place – Community Room for rental.

Sabine Hill – offer an all-inclusive historic dining experience to include tours, a special dinner cooked in the historic kitchen & served in the Taylor house, entertainment and related historic activities.

**Goal 3: Expand Special Events**

Special events can include revenue generating concerts, golf tournaments, seasonal hikes, and incorporation of holidays and special days of the year to increase overnight occupancy and to show off culinary delights in the restaurant.

Objective 1: Inventory all Special Events locations currently being held at the Park.

Action plans:

A. Listing of events currently being held at the park

Old Christmas at Fort Watauga - January

Colonial Skills and Trades Muster - February

Overmountain Weavers Fibers Show - March

Carter Mansion Celebration - April

Spring Bird Walks - May

Colonial Kids at Fort Watauga - May

Siege of Fort Watauga - May

Native American Festival – 1<sup>st</sup> weekend after Memorial Day

18th Century Independence Celebration and Muster - June

Liberty! The Saga of Sycamore Shoals – Tennessee’s Official Outdoor Drama - July

Annual NABA Butterfly Count - August

Sycamore Shoals Celtic Festival - September

Overmountain Victory Trail Celebration and River Crossing - September

Sons of the American Revolution Gathering - September

Sycamore Stitchers Quilt Show - October

Knap-In at Fort Watauga – October

Spinning and Fiber Meet - October

Scary Stories at Fort Watauga - October

A Walk in Their Boots – Military Timeline - November

Harvest Celebration and Muster- November

Christmas at the Carter Mansion - November

Traditional Arts Workshops – most weekends throughout the year

Special Hiking Events – Ranger led hikes hosted at all 56 parks during the calendar year

First Hike – January; Spring Hike – March; National Trails Day – June;

National Public Lands Day – September; After Thanksgiving Day Hike – Nov.

- B. Our park does not offer overnight accommodations nor a park restaurant to serve our guests. Based on our current staffing pattern we feel we successful in offering a high number of quality, educational special events and programs, but do not believe these events could be made larger in regards to what is offered at this time. We are *always* working to increasing event attendance at all times through email blasts, advertising funded by our Friends group, community support such as the Chamber of Commerce, posters and flyers, and social media outlets.
  
- C. The only area in which we are planning added events at this time will be at Sabine Hill once restoration is complete. Both the Carter Mansion nor Sabine Hill has a dedicated employee and the addition of a position that could float between both sites would enable us to keep these two sites open on a regular schedule.

With our current staff we will schedule tours and events at Sabine Hill that have not yet been determined.

D. Partnerships:

- a. Friends of Sycamore Shoals offers support to a great portion of our events –Support includes providing refreshments at events and meetings, buying advertising, funding the publication of our annual Special Events brochure, purchasing rack cards to advertise Liberty!, providing volunteers during events, helping with the implementation of the Native American Festival, providing volunteers to help with tours of our new exhibits, and helping us to make purchases to help with projects or park needs that our budget cannot absorb – just to name a few.

Their largest contribution to Sycamore Shoals is the organization and funding of Liberty! Tennessee's Official Outdoor Drama that takes place in July each year, in its 37<sup>th</sup> season in 2015. Their monetary contribution to this event involves purchasing expensive sound and lighting equipment, funding an individual to oversee inventory and care of costumes/period clothing that is loaned to the performers, buying clothing for cast members, providing for the director/sound technician/ and theatrical lighting technician, ticket sales, providing food concessions, printing of scripts, and taking care of the costs of all of the unexpected needs that present themselves. Our cast of approximately 100 individuals all volunteer their time.

- b. The Upper East Celtic Society organizes and presents the annual Celtic Festival in September at Sycamore Shoals. They enter into a License Agreement with the State of Tennessee and pay \$500.00 to assist in park costs for this event
- c. The Washington County Regiment North Carolina Militia is a solely volunteer organization that is a part of Friends of Sycamore Shoals. These individual share at least one weekend per month with Sycamore Shoals to present educational programs and demonstrations during several of the militia musters and events presented under “ Part A - Special Events.” Additionally, they travel to other historic events across the southeast to promote Sycamore Shoals and share the stories of our park.
- d. The Watauga Valley Fife and Drum Corps, now Tennessee's Official Fife and Drum Corps, is solely a volunteer organization and is also a part of Friends of Sycamore Shoals. They share their time at militia events performing military music of the late 18<sup>th</sup> century. Additionally, they travel to other historic events across the southeast to promote Sycamore Shoals and share the stories of our park.
- e. Elizabethton Carter County Chamber of Commerce and Tourism Council - Sycamore Shoals maintains a membership with the Chamber and they in turn support us through promotions, email blasts, and representing us at festivals and events in and outside of the Tri-Cities area. They also provide Pizza Night for members of Liberty! the last weekend of the outdoor drama.
- f. The Overmountain Victory Trail Association, the National Park Service, and the Sons of the American Revolution all partner with the park and the Washington County Regiment in presenting programs associated with the Overmountain Victory Trail Crossing and Celebration in September.

- g. The Liberty Spinners spend one Tuesday morning per month to demonstrate spinning and related skills. Additionally, they plan and present the October Spinning and Fiber Meet.
- h. East Tennessee Nursery Association and the UT Extension Service plan and present the annual Plant Auction each spring.
- i. The Lee and Lois R. Herndon Bird Club leads each of our Bird Walks both spring and fall
- j. The Sycamore Stitchers plan and present the annual Sycamore Stitchers Quilt Show the first weekend in October
- k. The Watauga Valley Art League plans and present two shows, the month of July and December, in addition to hosting the Tennessee Watercolor Society Traveling Exhibit, and uniquely themed shows in August.
- l. Food City in Elizabethton donates snacks to the park for special events, particularly to the Liberty cast during practices and performances
- m. The Doubletree Inn in Johnson City gives us complimentary rooms for Native American Festival presenters. Comfort Inn in Johnson City offers discounted rooms to Native American Festival presenters.
- n. Local Media Outlets – offer support to Sycamore Shoals by publicizing our special events and programs.

Objective 2: Prepare a list of new events that can be added to the list of current events. Consider events linked to the park's history, ecology, wildlife, and area patrons. List details:

Action plans:

We currently offer a very aggressive list of special events that is made possible by the wonderful team effort that exists between our small staff and all of our volunteers. For the most part, we are not planning to add additional events to our listing, with the exception of Sabine Hill.

Sabine Hill – after restoration we will be planning tours and special events at this site.

In addition to programming listed above under Special Events:

Our interpretive staff and militia volunteers engage in school programming both on and off the park throughout the year, in addition to programming and mentoring to college students via internships and other college requirements.

Our interpretive staff and volunteers present guided tours of our exhibits, Fort Watauga, and the Carter Mansion

During the summer months we employ one Seasonal Interpretive Ranger who is charged with presenting daily programs at all of our sites from late May through mid August

Volunteers present tours of our Arboretum

## Goal 4: Expand Recreational and Interpretive Programs

While SSSP already offers a wide variety of interpretive programs and recreational activities, the park staff should consider broadening the horizons with more group team building opportunities. With this in mind, the inclusion of a canopy tour operation should open up more opportunities to host groups with more and different interpretive programs. This should enhance people to visit the park more frequently and stay longer partaking of park facilities.

### Objective 1: Evaluate and prepare programs that can be offered to in-house groups.

#### Action plans:

We offer tours to organized groups such as bus tours, civic clubs, college classes, family reunions, entire school populations, church groups, and the like.

An example of a tour would include:

Welcoming remarks and overview of park story

Guided tour of Exhibits/Museum ending with orientation film

Short break for restroom stop and shopping in the gift/book shop

Walking tour of Fort Watauga and trail walk to the crossing site of the Overmountain Men by the Watauga River; may include walking the entire trail depending on the groups interest. This may incorporate additional history, native plant talks, a visit to the NABA certified Monarch Waystation and butterfly garden.

Lunch Break – Meal arranged and provided by the group we are serving. They may eat in either the Gathering Place (Community Room) or one of the Picnic Shelters for lunch.

Afternoon Session – May involve a hands on activity; demonstrations of life skills in the 18<sup>th</sup> century; a tour of the Arboretum; a special guest presenter; or specific topics that have been requested by the group.

## **Goal 5: Improve the Effectiveness of Marketing and Sales**

Objective 1: Obtain 3,000 Facebook 'likes' on our existing page.

Action plans:

Posts are made a minimum of two times a week

Posts are made to promote upcoming programs

Use photographs to engage interest

Interpretive staff will post a short video two times per month

Encourage Facebook friends to help us get additional 'likes' on our page

Objective 2: Email blasts are sent to members of approximately 12 email groups which include all local media outlets and Friends of Sycamore Shoals membership.

Action plans:

Email groups annual Special Events calendar

Email groups month events listing

Email groups listings of Traditional Arts Workshops

Email groups invitations to Friends meetings and programs

Email groups information on new programs and announcements not included above

Objective 3: Maintain and update [www.sycamoreshoalstn.org](http://www.sycamoreshoalstn.org)

Action plans:

Keep information on the home page updated with current information on activities

Keep General Park and park history information up to date

Use photographs to engage interest

Post link to Facebook when webpage has been updated

Objective 4: Communicate park information to staff for updates to the Tennessee State Park webpage for Sycamore Shoals and for the Tennessee State Park Facebook page.

Action plans:

A. Include TN State Park marketing staff on email blast lists

B. Keep up to date photographs for marketing staff use on the "O" drive

Objective 5: Develop passive surveys and intrusive surveys.

Action plans:

- A. Short survey is available in the lobby of the Visitors Center which gathers guest information in regards to the activities they may take part in, gift shop experience, cleanliness of the park, and courtesy of staff. A place for comments is also provided
- B. Prepare survey via Survey Monkey 1 times per year
- C. Visitors sign in book remains in lobby on information table – requests email address
- D. Greeters in the Visitors Center and programming at our historic house museums greet guests and ask where they are from. This information will be recorded at our office location.

Objective 6: Create posters and flyers to promote park events

Action plans:

- A. Keep copies of all upcoming park events on the information table in the lobby
- B. Keep copies of general park information, walking tours, and interpretive organizations on the information table in the lobby
- C. Post park information on the bulletin board at the outside entrance of the Visitors Center
- D. Keep brochure rack at the outside entrance of the Visitors Center stocked.
- E. Keep copies of upcoming events and park information in the Visitors Center of the Carter Mansion
- F. Distribute brochures, posters and flyers throughout the community, to the local Chambers, and to Welcome Centers on I-26 and I-81
- G. Email PDF's of posters and flyers to our email notification lists

Objective 7: Maintain video announcements in the lobby of the Visitors Center via flat screen television

Action plans:

- A. Video images will be updated 4 times per year to reflect past and upcoming events at the park

Objective 8: Maintain good working relationships with fellow historic & community organizations

Action plans:

- A. Participate and assist in programming efforts during events at other local and southeastern sites.
- B. Promote events of other historic places both locally and throughout the southeast

## **Goal 6: Monitor and Manage Customer Service and Satisfaction**

Objective 1: Develop a way to monitor activities and services throughout the park on a regular basis.

Action plans: What is to be done; frequency; by whom.

- A. Short survey is available in the lobby of the Visitors Center which gathers guest information in regards to the activities they may take part in, gift shop experience, cleanliness of the park, and courtesy of staff. A place for comments is also provided
- B. Prepare survey via Survey Monkey 1 times per year
- C. Immediately respond to customer complaints
- D. Monitor Facebook and webpage comments
- E. Review and copy comments from Trip Advisor on a monthly basis

Objective 2: Set a numeric or descriptive goal that all park personnel will strive for by which customer service and activities offered are evaluated as good.

Action plans: What is to be done; frequency; by whom.

- A. Our passive survey rates customer service and other activities of a scale of –
  - a. Poor, Needs Improvement, Successful, to Excellent

All park personnel strive for a higher percentage of Excellent ratings compared to Successful

- B. On Trip Advisor, ratings range from 1 to 5 with 5 being the highest

All park personnel strive for 4 or 5 on this system

- C. Written or verbal comments in any format (survey, letter, in person, or other)

All park personnel strive for positive written and verbal comments from our guests, but also accept and welcome constructive ideas for ways we can improve our customer service.

## **Goal 7: Expand Partnership Opportunities**

All park locations have multiple types of partnership opportunities. The most obvious is the Friend's Group who raises money for Park projects and provides personnel to work on Park projects and events. Other types of partnerships include Campground Hosts, golf course volunteers, local companies that provide free services and institutional organizations that lend trustee prisoners for day-use work.

*By expanding partnerships, the Park can reduce the costs of materials and supplies and related services needed by the Park, and offset event and program costs.*

Objective 1: Find ways to expand and measure the contribution by partnership and report this outcome annually, both in monetary contributions and volunteers hours worked. (Types of Partnerships would be Friends, Park Volunteers, Court Mandated Community Service and local businesses.)

Action plans: What is to be done; frequency; by whom.

- A. Our primary partner is our Friends group, Friends of Sycamore Shoals, which offers support to a great portion of our events –Support includes providing refreshments at events and meetings, buying advertising, funding the publication of our annual Special Events brochure, purchasing rack cards to advertise Liberty!, providing volunteers during events, helping with the implementation of the Native American Festival, providing volunteers to help with tours of our new exhibits, and helping us to make purchases to help with projects or park needs that our budget cannot absorb – just to name a few.

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Volunteer hours would be requested from Friends of Sycamore Shoals at the end of each calendar year.

- B. Continue relationships with Doubletree Inn and Comfort Inn in Johnson City to provide lodging to guest speakers and presenters at events. Request additional support from other local hotels/motels/inns. Park staff will record and monitor these hours
- C. Request contributions from local food service providers for events  
Park staff will record and monitor these hours
- D. Request contributions from Pepsi for events requiring drinks and water  
Park staff will record and monitor these hours
- E. Request assistance from Northeast Tennessee Correctional facility when labor is required. They currently help us annually to spread mulch in the spring and to assist in clearing the grounds of limbs and debris.  
Park staff will record and monitor these hours
- F. Continue to work with individuals who wish to volunteer at the park who are not members of any particular organization  
Park staff will record and monitor these hours
- G. Continue to work with students from ETSU who are volunteering to fulfill course requirements. Park staff will record and monitor these hours

## Park Overview

### Park Fact Sheet

Park Name	Sycamore Shoals State Historic Park
Region Manager	Robin Peeler
Park Manager	Jennifer Bauer
Park acreage	83.78
Total Number of Visitors (FY13-14)	285,593
Total Expenses before CO (FY13-14)	445,241
Total Revenues (FY 13-14)	8,511
Retail Self-sufficiency % <sup>1</sup>	0
Park Self-sufficiency %	2%
Avg Expense per Visitor (FY13-14)	1.56
Avg Revenue per Visitor (FY13-14)	.03
Gross Profit or Loss	436,730
Total full-time positions available / filled	6 / 6
Total part-time positions available / filled	0 / 0
Primary feeder markets	Bristol TN and VA, Southwest Virginia, Johnson City, Knoxville, Kingsport, Elizabethton, Mountain City, Roan Mountain, Western North Carolina
Primary reasons people come	Historical Programming, Site of Muster of Overmountain Men & Transylvania Purchase, Carter Mansion, Sabine Hill, Hiking and Community Events, Watauga River, New Interpretive Exhibit opened June 2013
Opportunities for improvement	Increase size of community room & add kitchen & room divider, to provide rental space to generate revenue. Provide restrooms & playground equipment at rental picnic shelters to increase rentals. Additional personnel

<sup>1</sup>Based on T.C.A. 11-3-305, Self-sufficiency of revenue-generating facilities

## Site Summary

The area was the first permanent American settlement outside the original 13 colonies, in 1772. This was the site of the Watauga Association in 1772, the Transylvania & Watauga Purchases in 1775, the attack of Fort Watauga in 1776 and the historic muster of the Overmountain Men in 1780, before their march to fight the battle of King's Mountain. Sycamore Shoals also manages two satellite historic house museums, the Carter Mansion and Sabine Hill.

## Key Attractions

- The Interpretative/Visitors Center is open Tuesday through Saturday from 9 am – 4 pm, Sunday from 1 – 4:30 pm and Closed on Monday.
- New Interpretive Exhibits/Museum which opened June of 2013. Also includes a new orientation film in the theater of the exhibit area.
- A historical reconstruction of Fort Watauga, which was excavated about a mile away, is open daily.
- The museum and the fort interpret the role this area played in 18<sup>th</sup> century history.
- Tours of the 18<sup>th</sup> century Carter Mansion are also available by appointment.
- Sabine Hill should be open to the public by Fall or Winter of 2015.
- The Watauga River trail attracts thousands of visitors each month
- Tennessee Urban Forestry Council certified Arboretum
- North American Butterfly Association certified butterfly garden and monarch waystation
- Interpretive programming which includes, but is not limited to, 18<sup>th</sup> century Militia Musters, Siege of Fort Watauga, Native American Festival, Celtic Festival, Liberty! Tennessee's Official Outdoor Drama, Traditional Arts Workshops, and Art Shows.

## Financial Targets

The following table details the total operating expenses and earned revenues for Sycamore Shoals State Park over the last four years (FY 09-13).

Actual	FY10-11	FY11-12	FY12-13	FY13-14
<b>Visitors</b>	261,074	325,849	307,070	285,593
<b>Total Revenues</b>	11,302	3,410	2,536	8,511
<b>Total Expenses</b>	412,459	417,033	419,976	445,241
<b>Revenue per Visitor</b>	0.04	0.01	0.01	.03
<b>Expense per Visitor</b>	1.58	1.28	1.37	1.56
<b>Retail Self-sufficiency %</b>	0	0	0	0
<b>Gross Profit</b>	(401,157)	(413,623)	(417,440)	(436,730)
<b>Park Self-sufficiency %</b>	3%	1%	1%	2%

Use year 2 for Objectives Pro forma	Base Year FY12-13	%+	Year 1 FY13-14	%+	Year 2 FY14-15
<b>Gift Shop</b>		20%	-	10%	-
<b>Programs</b>		2%	-	4%	-
<b>Other</b>	2,536	3%	2,612	4%	2,717
<b>Total Revenue</b>	2,536	3.5%	2,612	3.9%	2,717
<b>Total Expense</b>	419,976	0%	419,976	0%	419,976
<b>Gross Profit</b>	(417,440)		(417,364)		(417,259)
<b>Park Self-sufficiency</b>	1%		1%		1%

## Key Recommendations

1. Enlarge the size of the community room in the Visitors Center; add a kitchen area, and a room divider to provide much needed rental space for the community and generate revenue for the park. In addition, park offices can be enlarged at this time
2. Renovate the Fort Watauga Amphitheater, the site of the presentation of Tennessee's Official Outdoor Drama, "Liberty!" The seats and steps need replacing, the sound & light booth enlarged, and a roof needs to be created to protect the audience. Liberty! attracts guests from all over the United States. The condition of the present amphitheater is a necessity to ensure that guests will be able to enjoy this show without concerns over the threat of rain, visit our park and community, and invest in our park financially during their visit.

This facility, renovated, could be rented for a multitude of events.

3. Addition of Personnel to enable us to have staff to implement these suggestions. Sycamore Shoals and its 2 satellites need an additional Ranger 2, Conservation Worker 1, and Clerk 1. If we engage in rentals into the evenings, a night watchman, in a Laborer position, would also be an important addition.

## Short Term Recommendations (Less than 1 year)

1. Add restroom facilities to the picnic shelter area. The lack of restrooms makes it difficult to rent these shelters.
2. Add a playground to the picnic shelter area. The presence of a playground would make rental of the shelters more attractive.
3. Wifi accessibility

## Long Term Recommendations

1. Build an enclosed, rustic, recreational facility in the vicinity of the picnic shelters.
2. Acquire land on the north side of the Watauga River. (Sycamore Shoals is on the south side). This land was also a part of the historic muster grounds during the American Revolution. It nearly became a 4 lane highway, until archaeological work conducted by TDOT indicated that there was a strong historic presence there.
3. Acquire land bordering the Carter Mansion and/or Sabine Hill if it becomes available.
4. Key Recommendations, above, also fall under this category

## Park and Operations Assessment

This section is an assessment in detail of facilities, operations, and financial forecasts. The findings are not intended to be exhaustive review of all issues but a basic overview of the predominant issues. The assessment includes the following:

- Park Facilities Assessment
- Operational Assessment
- Financial Assessment

## Park Facilities Assessment

Facilities and park assets are rated using a nominal scale of excellent, good, fair or poor. Descriptions of those rankings are provided below.

<b>Scale of Conditions</b>	
<b>Rating</b>	<b>General Description</b>
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. 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. 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. Users 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

## Park Inventory & Facility Assessment

The table below is an inventory of facilities and amenities.

### Needed capital improvements - Assets & Amenities

Park Asset/Amenity	Quantity	Condition
Picnic area	1	Good
Visitor Center	1	Good
Picnic shelters	3	Good
Fort Watauga	1	Good
Fort Watauga Amphitheater	1	Fair
Stage associated with 3 picnic shelters	1	Good
Carter Mansion Visitors Center	1	Good/Fair
Historic Carter Mansion	1	Good
Historic Sabine Hill	1	Currently being renovated
Sabine Hill Visitors Center	In Planning	N/A
Ranger residence	1	Good
Maintenance Building	1	Excellent

List new assets and amenities that would fall under capital expenditures that are needed to improve customer service and drive revenue.

New Assets & Amenities	Description
Enlarge Visitors Center	To provide one large room, with the option of two smaller rooms of rental space; with added kitchen. Room could also be used for additional public programming. Incorporate enlargement of offices & addition of small library for public research.
Renovate Ft. Watauga Outdoor Amphitheater	Replace seating, enlarge sound/light booth, cover seats with roof to provide audience comfort during presentation of Tennessee's Official Outdoor Drama, Liberty!. Area could also be rented
Build rustic recreation building	As a rental facility, near the picnic shelters
Addition of Personnel	For us to provide additional revenue producing services, we would need personnel to implement our plans.

## Prioritized Facility Needs

Based on the inventory and assessment conducted above, these prioritized needs have been identified.

Facility Need	Priority Assignment
Enlargement of Visitors Center	High
Renovate Ft. Watauga Outdoor Amphitheater	High
Build Rustic Recreation Building	Moderate
Addition of Personnel	High
Addition of Playground near Picnic Shelters	High
Addition of Restrooms near Picnic Shelters	High

## Operational Assessment

The Operational Assessment includes:

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

### Inventory and Classification of Programs and Services

- 1) Programs and services are classified as Core or Essential Services
- 2) Important Services
- 3) Visitor Supported Services

Programs and services at the park are classified into these categories based in part on the mission and public mandates for both the site and the agency.

### Category 1 – Core Services (largely supported by tax funds)

Core programs, services and facilities are those the agency must provide and/or 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 following programs and services at Sycamore Shoals State Park have been identified as **core services**:

- Support the mission of Tennessee State Parks which is “to preserve and protect, in perpetuity, unique examples of natural, cultural, and scenic areas and provide a variety of safe, quality, outdoor experiences through a well-planned and professionally managed system of state parks.
- Provide for public access to the park, the facilities and the grounds.
- Provide for public safety for visitors and protection of natural and cultural resources.

- Provide for maintenance of grounds, facilities and infrastructure.
- Maintain facilities developed through the LWCF program to required standards.
- Provide for basic, non-staff supported day-use activities (such as hiking and picnicking) with trails, informational signage, picnic tables, trash cans and restroom facilities.
- Maintain park drinking water and wastewater programs to state standards.

**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. The following programs and services at Sycamore Shoals State Park have been identified as **important services**:

- Provide a full range of environmental, cultural and recreational programs.
- Offer park-specific information at the Visitor Center and Nature Center.
- Provide educational programs for schools and organized groups.
- Provide support for playgrounds and picnic areas

**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. The following programs and services at Sycamore Shoals State Park have been identified as **visitor supported services**:

- Operate and provide retail support services for the gift shop.
- Rental of 3 picnic shelters and outdoor stage
- Rental of the Gathering Place – Community Room in the Visitors Center
- Purchase of TSP gift shop merchandise for resale in Eastern National bookstore

**Staffing Assessment**

Total full time positions available / filled

6 / 6

Total part time positions available / filled

0 / 0

Labor Support (Non-paid)

Labor Support	Annual Hours
Friends of Sycamore Shoals State Historic Area	15,000 est
Park Volunteers	2,000 est
Court Mandated Community Service (probation/prisoner)	150
Total	

## Labor Budget Summary

Based on a 4 year average, total personal expense is 24% of total expense.

<b>Expenditure Description</b>	<b>FY10-11</b>	<b>FY11-12</b>	<b>FY12-13</b>	<b>FY13-14</b>	<b>% Change from 2011</b>
Personnel Services	173,567	172,659	180,506	193,527	10%
Employee Benefits	107,632	113,520	122,504	123,835	13%
<b>Total Personnel Expenses</b>	<b>281,199</b>	<b>286,179</b>	<b>303,010</b>	<b>371,362</b>	<b>24%</b>

## Visitation and Occupancy

<b>Fiscal Year</b>	<b>Total Visitation</b>
FY10-11	261,074
FY11-12	325,849
FY12-13	307,070
FY13-14	285,593

## Financial Performance Assessment

### Operational Expenses

A summary of total operating expenses from FY10-11 through FY13-14 are provided below.

#### Part 1 – Profit center Self-sufficiency

	<b>FY10-11</b>	<b>FY11-12</b>	<b>FY12-13</b>	<b>FY13-14</b>
<b>Profit Center Revenue</b>	0	0	0	0
<b>Sub-total Cost &amp; Expense</b>	0	0	0	0
<b>Self-sufficiency %</b>	0	0	0	0

**Part 2 – Other profit center revenues and expenses**

	<b>FY10-11</b>	<b>FY11-12</b>	<b>FY12-13</b>	<b>FY13-14</b>
<b>Vending</b>				
<b>Park Maintenance</b>	696	709	1,283	1,216
<b>Picnic Shelters</b>	846	892	815	380
<b>Boat Rental</b>				
<b>Fishing</b>				
<b>Grocery Store</b>				
<b>Swimming</b>				
<b>Gen Rec Other</b>	2,403	1,809	437	-3,450
<b>Leased - Equestrian</b>				
<b>Leased - Gift Shop</b>				
<b>Leased - Other</b>				
<b>Misc</b>	7,357			10,365
<b>Other Profit Center Revenue</b>	11,302	3,410	2536	8,511
<b>Cost &amp; Expenses from Other Profit Centers</b>				
<b>COGS</b>				
<b>Personnel Expenses</b>				
<b>Other Expenses</b>				

**Part 3 – All sections combined to yield the Parks gross profit or loss**

	<b>FY10-11</b>	<b>FY11-12</b>	<b>FY12-13</b>	<b>FY13-14</b>
<b>Total Revenue</b>	11,302	3,410	2536	8,511
<b>-Total COGS</b>				
<b>-Total Personnel Expense</b>				
<b>Other Expense</b>				
<b>Total Expense</b>	412,459	417,033	419,976	445,241
<b>Gross Profit</b>	(401,157)	(413,623)	(417,440)	(436,730)
<b>Park Self-sufficiency%</b>	3%	1%	1%	2%

## Review of Pricing

### PICNIC SHELTER RESERVATION/RENTALS:

Name of Park	Shelter(s)	Per Day	Half-Day
Sycamore Shoals	3@	\$35.00	

## Competitors

List any competitors for the above listed facilities.

Elizabethton City Pool – Rents 2 picnic shelters at a cost of \$20.00 per day plus the cost of admission to the pool. The shelter quality is equal to ours. Of course, their attraction is the pool in many cases and they DO provide restrooms, but there is not room around the perimeter of the shed for other family activities. Our shelters have a large field in front of them and if we added a playground and restrooms, we would be competitive.

## Customer Service and Satisfaction

- A. Letters written to park management, AskTNState Parks, and our Commissioners come in periodically giving high praise to our staff for their interpretive programming accomplishments and excellent level of customer service
- B. Passive written survey available in our Visitors Center Lobby:

End of FY 14 –

45 Surveys returned from a period of March 2014 to June 30, 2014

**Rating Scale:** Excellent      Successful      Needs Improvement      Poor

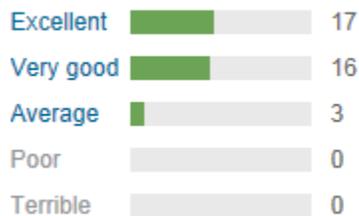
**Results:** **Excellent: 283**    **Successful: 94**    **Needs Improvement: 5**    **Poor: 0**

- C. Tripadvisor Rankings as of 10/27/14

**Ranked #2** of 3 Attractions in Elizabethton

 36 Reviews

### Visitor rating



## Financial Pro Forma

The following five-year pro forma projects the financial outcomes based on the strategies and desired outcomes identified in this business plan.

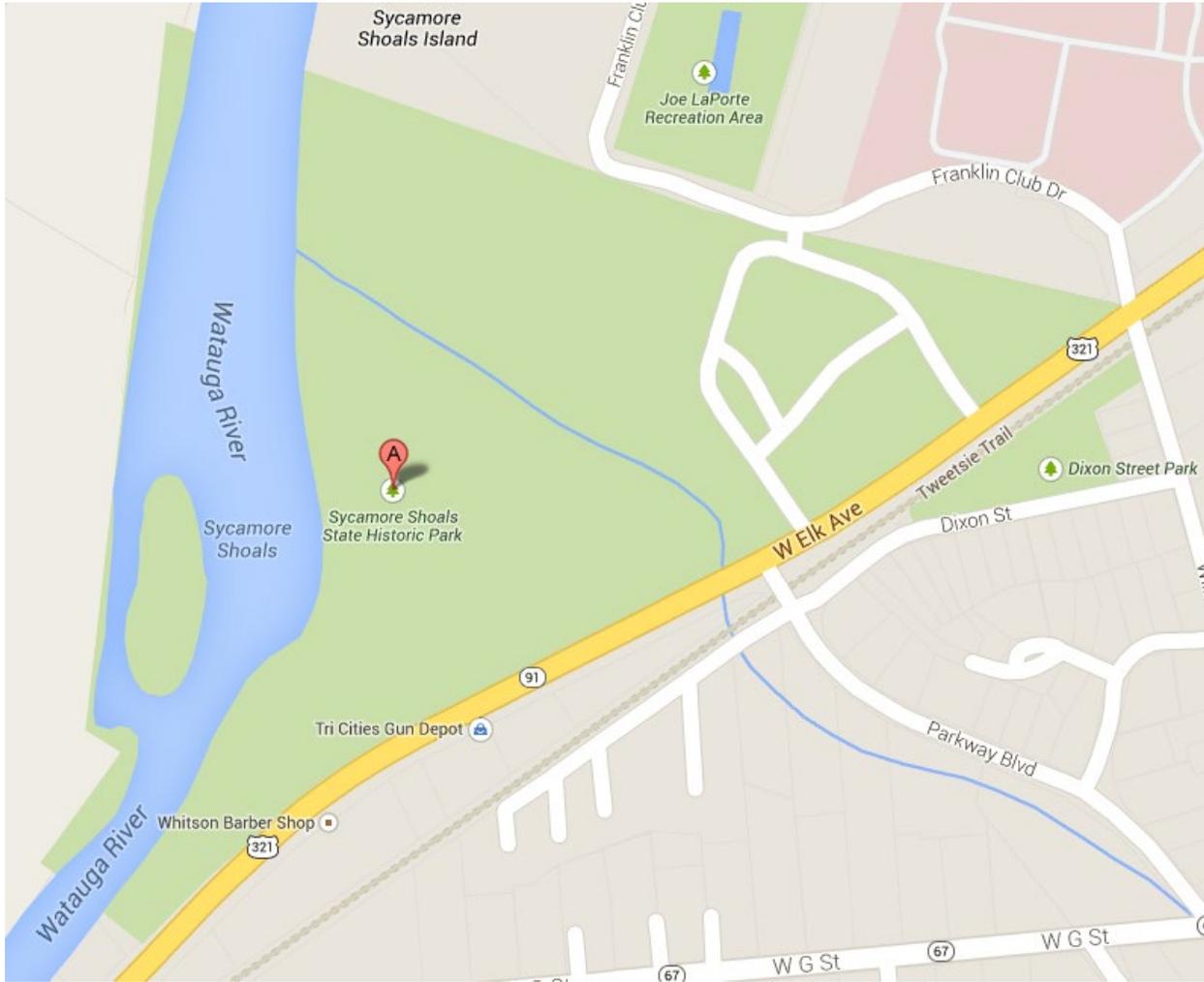
Revenue Objectives	Base Year		Year 1		Year 2	
	FY12-13	%+	FY13-14	%+	FY14-15	
<b>Gift Shop</b>		20%	-	10%	-	
<b>Programs</b>		2%	-	4%	-	
<b>Other</b>	2,536	3%	2,612	4%	2,717	
<b>Total Revenue</b>	2,536	3.5%	2,612	3.9%	2,717	
<b>Total Expense</b>	419,976	0%	419,976	0%	419,976	
<b>Gross Profit</b>	(417,440)		(417,364)		(417,259)	
<b>Park Self-sufficiency</b>	1%		1%		1%	

	%+	Year 3		Year 4		Year 5	
		FY15-16	%+	FY16-17	%+	FY17-18	
<b>Gift Shop</b>	10%	-	5%	-	5%	-	
<b>Programs</b>	4%	-	5%	-	5%	-	
<b>Other</b>	4%	2,825	5%	2,966	5%	3,115	
<b>Total Revenue</b>	4.5%	2,825	5.0%	2,966	5.0%	3,115	
<b>Total Expense</b>	0%	419,976	0%	419,976	0%	419,976	
<b>Gross Profit</b>		(417,151)		(417,010)		(416,861)	
<b>Park Self-sufficiency</b>		1%		1%		1%	

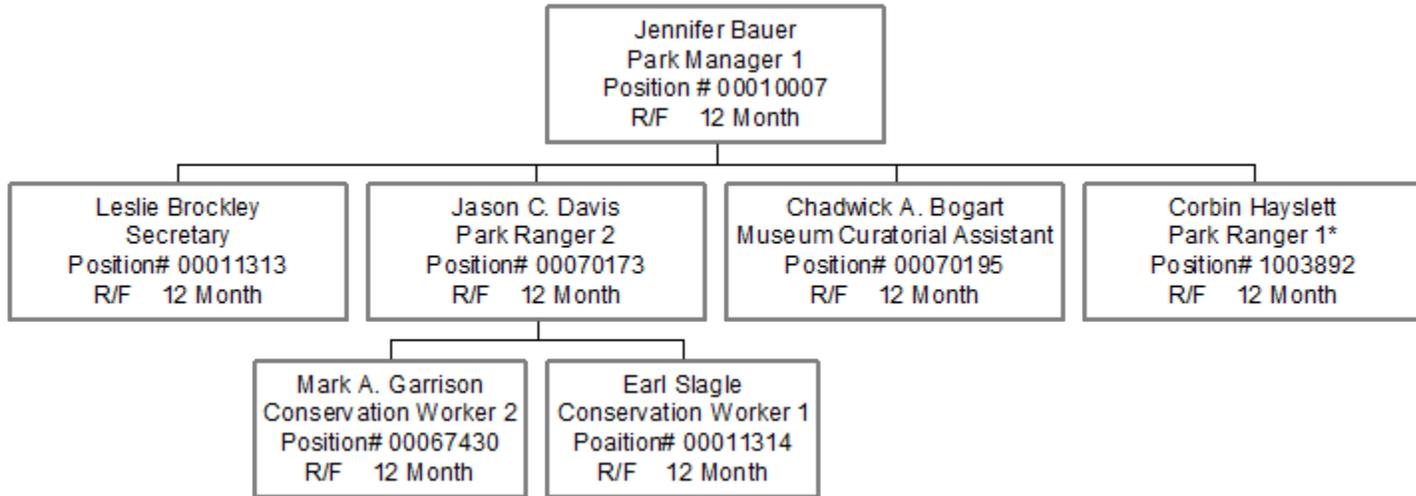
Park Map



## Google Map



## Organizational Chart



\*Updated 01-02-2019; Page 29; Public Hearing held October 9, 2018 at Sycamore Shoals State Historic Park as per Tenn.Code Ann. 11-3-120

# Business & Management Plan

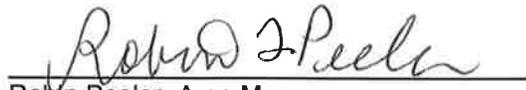
## Sycamore Shoals State Historic Park

Updated January, 2019

Approved by:

  
Jennifer Bauer, Park Manager  
Tennessee State Parks

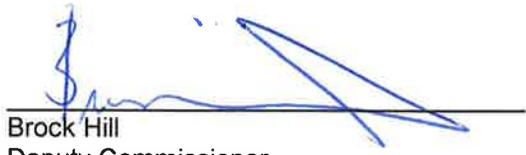
Date: 1-17-19

  
Robin Peeler, Area Manager  
Tennessee State Parks

Date: 1/18/19

  
Mike Robertson, Director of State Park Operations  
Tennessee State Parks

Date: 1/18/19

  
Brock Hill  
Deputy Commissioner  
Parks & Conservation

Date: 1/18/19

