

## 5 year action plan template and Instructions

### Instructions:

1. Begin by outlining the accomplishments of the heritage area, and then create a list of things that need to be accomplished by the organization in the next five years, and anything that needs to be added/changed from your initial Management Plan. Doing this with stakeholders or internally with the staff/board is appropriate, and should be guided by a thorough review of the Management Plan and previous 5-Year Plans. The conversations with stakeholders and board members will help to understand what the role of the Management Entity needs to be moving forward.

2. Use the template below to:

- a. Draft program and organizational goals
- b. Draft objectives, action items, timelines, estimated costs, and responsibilities for each goal.

3. Categorize each objective as one or more of the four MHAA Categories of Activity: Product Development, Building Partnerships, Regional Identity and/or Organizational:

**Product Development:** Management entities lead or initiate the creation of new or enhanced place-based (archaeological, historic, cultural, natural) experiences for both visitors and Maryland residents. Heritage Areas focus on the sustainability and capacity of these heritage tourism products both so their partner Destination Marketing Organizations (DMO) have more to market to the consumer and so Maryland residents have better communities in which to live.

**Building Partnerships:** Management entities work to engage all partners and leverage resources. They work to bring both common and uncommon partners together to focus on projects of common benefit. Heritage Areas bring disparate state and local entities together around a common, local vision. Heritage Areas help to build organizational capacity, understanding, and access to financial and technical assistance.

**Regional Identity:** Heritage Areas provide a connection to a place that showcases each area's distinctive archaeological, cultural, historic, and natural assets. They apply an approach that is unique to, and respectful of, local geography. Through the projects and events that they host or encourage, Heritage Areas sustain, respect, and celebrate the heritage of an area, making it relevant to both present and future generations.

**Organizational:** Activities that relate to the internal workings of the Management Entity.

## **[Insert HA Name] 5 Year Action Plan FY 2024 - 2028**

**Heritage Area Vision for the Next Five Years:**

**Heritage Area Mission:**

**Heritage Area Accomplishments:**

**Summary of Program Goals for FY 2024-FY 2028:**

**Summary of Organizational Goals for 2024-2028:**

# Goal 1:

## Objective 1:

### Action Items:

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### Deliverables / Measurable Items:

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Project Lead and Partners:	Categories of Activity (Bold those that apply)	Project Duration:
<ul style="list-style-type: none"> <li>- Lead:</li> <li>- Partner:</li> <li>- Partner:</li> <li>- Partner:</li> </ul>	<ul style="list-style-type: none"> <li>- Heritage Product Development</li> <li>- Partnership building</li> <li>- Sustaining Regional Identity</li> <li>- Organizational</li> </ul>	

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### Reason for Priority

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**Objective 2:**

**Action Items:**

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**Deliverables / Measurable Items:**

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**Reason for Priority**

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**Objective 3:**

**Action Items:**

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**Deliverables / Measurable Items:**

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## Goal 2:

### Objective 1:

**Action Items:**

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**Deliverables / Measurable Items:**

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**Reason for Priority**

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## Goal 3:

### Objective 1:

#### Action Items:

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#### Deliverables / Measurable Items:

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## **Appendix A. Definitions**

**Goals:** These set out the accomplishments the organization hopes to make within a specific time period.

**Objectives:** Statements (usually measurable in some way) of short-term achievements and collections of activities that, if achieved, constitute fulfillment of the goals.

**Strategies/Action Items:** The activities that will be implemented to ensure that the goals are accomplished. They answer the question, “What will it take to accomplish our goal?”