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## TALL OAKS CAMP AND CONFERENCE CENTER

Strategic Plan Final Draft  
Presented by the Tall Oaks Steering Committee  
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## Strategic Plan (Final Draft)

### September 25, 2023

### HISTORY

Following the September 2022 Regional Board meeting where strong support was shown for the ministry of Tall Oaks and the recommendation to sell Tall Oaks was tabled, the Tall Oaks Steering Committee was formed. This committee, comprised of the individuals named above, was tasked with the following:

1. Find/create alternate plan(s) that could work –OR –flesh out one of the plans already proposed at 2022 Listening Sessions.
2. Answering the questions given to us by the Regional Executive Committee in the Fall of 2022
3. Consider the role of the Tall Oaks Board.
4. Determine whether or not we need to extend the UCCR contract after the end of 2023. This needs to be known by UCCR by July 1. All extensions are for a minimum of 3 months at a time per the current contract addend.
  - a. Note: Extension with UCCR through March 2024 was made on July 1, 2023 following the Regional Board vote at their June 2023 meeting.

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As noted in item 2, the Executive Committee of the GKC Regional Board gave our committee a number of questions/items that they instructed us to address as we developed our plan. Those are as follows:

- Ability to raise funds to pay for deferred maintenance without funds from our Region.
- Cash reserves to cover operational or maintenance needs without funds from our Region.
- Definition of the organizational structure that will lead Tall Oaks.
- Definition of how Tall Oaks, the Regional Camp & Conference Committee, and the Region will work together into the future on decisions and items requiring Board approval for Tall Oaks.
- Plan for how to maintain the current increased commitment and enthusiasm so that it doesn't diminish in future years.
- Definition of performance measures to gauge that Tall Oaks is being successful.
- Action to be taken if performance measures and financial needs are not being met.

From December 2023 to now, the Tall Oaks Steering Committee has met twice a month every month with the goal of answering these questions and creating the most comprehensive plan possible for the sustainability and fruitfulness of Tall Oaks Camp & Conference Center and our present/future Regional Ministries that take place there. The first several months of meetings were spent interviewing UCCR leadership and department heads, managers of successful DOC campgrounds, a Regional Minister who has led one Region into a renewed partnership with their camp (and is currently leading another Region in a similar direction), our Regional Treasurer, and an executive from Youth Front (a very successful camp system in the KC Metro). All those individuals we interviewed agreed that in their estimation of Tall Oaks, we have what it takes to run a sustainable and fruitful camp – and those who are not employed by UCCR expressed their belief that we have what it takes to run Tall Oaks sustainably without partnering with UCCR. The remaining months of meetings have been spent crafting the strategic plan found here.

During our initial interviews, we were extremely impressed with what UCCR representatives had to say about their operations both generally and at Tall Oaks in particular. However, over the last three months (during our 2023 summer camping season), many of our committee members spent significant time on the ground at Tall Oaks. During that time we discovered many disturbing things that eroded our trust in the organization's ability to steward our camp and our other resources. That list includes a variety of issues including diminished quality of hospitality due to staffing the camp at skeletal levels, dangerous (and potentially lethal) situations caused by employees who are overworked and exhausted, and a pattern of neglect to the facilities and other property assets. When these issues were brought to the attention of UCCR leadership at the highest levels, we were dismissed and treated as though we were blowing situations out of

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proportion. (Note: those situations have been documented and we are happy to discuss them with Regional Board members if requested).

As a result of our experiences with UCCR throughout the 2023 summer season as well as our cumulative research throughout the last year, we have made the decision to build a strategic plan that does not include partnership with UCCR.

## **STRATEGIC PLAN OVERVIEW**

In this plan, the Tall Oaks Board and Greater KC Region will not renew our contract with United Camps Conferences & Retreats (UCCR), allowing our relationship to end effective March 31, 2024. If the plan is adopted, the Tall Oaks Board will immediately begin work on two fronts:

- Launching a formal capital campaign to raise funds for large deferred maintenance projects, capital improvements, and a camp sustainability fund (surplus fund to help with lean winter months and surprise expenses), and;
- Leading a search process for a permanent Camp Director who, beginning no later than April 1, 2024, will act as the manager and administrator of Tall Oaks Camp & Conference Center.

The reconstituted Tall Oaks Board will be tasked with the oversight of the campground via their oversight of the Camp Director. In addition, the Tall Oaks Board will be tasked with two additional foci: fundraising/development and vision casting for Tall Oaks. The Camp Director will work closely with the Tall Oaks Board to manage operations and finances of the camp, and will be empowered to hire and train staff. The Tall Oaks Board and Camp Director will work on marketing and grant-writing together, with a future goal of hiring a staff person who will focus on each of these endeavors.

Financial sustainability for this plan includes income from user fees, Christian Church Foundation fund distributions and other donations, Capital Campaign contributions, fundraisers, grants, and limited budgeted support from the GKC Region. While we initially suggested that the GKC Region include an annual contribution of \$60k to Tall Oaks in their general budget, we have agreed to compromise on this point. That compromise removes the \$60k annual contribution – instead we ask that the yearly support from the GKC Region would take the form of the property taxes for Tall Oaks (approximately \$2000), property insurance (approximately \$28k), and ACA Accreditation fees (\$2000 at the next renewal, in two years).

We continue to believe that the GKC Region, as owner of the property, should have a limited financial stake in both the property and the ministry that takes place there. By paying the property taxes/insurance and continuing to employ a Camp & Conference Coordinator for Regional Camps, Conferences, and Retreats, this stake is met. If absolutely necessary, we also

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have room to negotiate on the payment of insurance for the camp – however, we strongly believe that the payment of annual property taxes and ACA accreditation should come from the GKC Region since the Region is the property owner. In return for this annual financial support, Tall Oaks will continue to offer a special Disciples rate for all DOC user groups.

Other key elements in this plan include separating finances from the Region so there is a more transparent and easily-understandable financial picture (and so that we can be more nimble as financial needs arise), streamlining the work of the Tall Oaks Board, developing a Volunteer Committee to manage groundskeeping and many maintenance projects, increasing user groups both within and beyond the GKC Region, and diversifying our fundraising tactics.

We are asking the Region for a five-year commitment to this plan and commit to meet with the Regional Board/Regional Minister regularly to assess the milestones/benchmarks that are included in this plan.

## Key Elements, Roles, and Goals

1. Camp Director
  - a. Roles
    - i. Oversight of Campus and Grounds
    - ii. Maintenance Responsibilities
    - iii. Staffing
      1. Assess Tall Oaks' needs and budget to determine proper staffing for grounds maintenance as well as camp operations
      2. Recruit and hire staff to fit those parameters
      3. Training and oversight of staff
    - iv. Bookings (which could include hiring to fill this role)
    - v. Provide a consistent and high-quality hospitality experience for user groups
    - vi. Report to Tall Oaks Board and work with them to vision cast and market the camp
    - vii. Work with DOC Volunteer Coordinating Team to assess continued maintenance and projects
  - b. Search for this position
    - i. A search for this position will be run by the Tall Oaks Board along with a liaison from the GKC Regional Personnel Committee. This group will determine the final financial package for the Camp Director, will have authority to hire this individual, and will submit the name of their pick to GKC Regional Board for their blessing.

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## 2. Redefined Tall Oaks Board

### a. Roles

- i. Visioning
  1. Set long-term goals for Tall Oaks
  2. Assess and plan for long-term Challenges for Tall Oaks
- ii. Fundraising/Development
  1. Grant writing with Camp Director until the Tall Oaks budget can sustain employment of a grant writer
  2. Long-term, diversified fundraising plan
- iii. Hiring of, oversight for, and clear/regular communication with Director on site
  1. This includes working with the Camp Director to approve budgeting and finances. Camp Director will be empowered to hire staff and make purchases below a certain dollar amount. Major purchases outside of budget parameters must be approved by the Tall Oaks Board.
- iv. Marketing (until Tall Oaks budget can sustain employment of a part-time employee to fill this role)
- v. Meet with Regional Minister and Regional Board to assess milestones/benchmarks
- vi. Take monthly management and oversight off our Regional Board and Executive Committee
- vii. Run a successful multi-phased capital campaign to meet maintenance needs, pay for capital improvement projects, and create a sustainability fund that will cover the leaner months of camp operations.
- viii. Work with Regional Treasurer and Finance Committee to separate Tall Oaks Finances from the Region by using a different management company.

### b. Qualifications

- i. Additional Tall Oaks Board members will be recruited based upon their skill sets and passion for Tall Oaks/camping ministry. Priority will be given to individuals whose skill sets include fundraising, marketing, grant writing, nonprofit management, camp programs, etc.
- ii. The Regional Board will be encouraged to recommend members for the Tall Oaks Board.
- iii. Much like the Board of Directors for General Units or Regional Disciples Women, the Tall Oaks Board will vote on new members and then submit those new members to the GKC Regional Board for their blessing.

## 3. Volunteer Committee

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- a. Chairs of Committee
    - i. This committee is currently chaired by Amy Traylor, Lea Ann Combs, and Lisa Engleken
    - ii. The committee chairs have developed and will maintain a spreadsheet of all maintenance and groundskeeping projects at Tall Oaks (in consultation with Camp Director). This list includes a breakdown of project priority, number of volunteers needed to complete a project, skill levels needed to complete a project, and supplies needed for each project.
    - iii. Individuals and groups who are interested in volunteering at Tall Oaks will be linked with the committee chairs so that projects can be assigned.
    - iv. Committee Chairs and Camp Director will provide oversight for volunteers/volunteer groups
    - v. A volunteering event will be planned quarterly and advertised throughout the GKC Region to bring together congregations/individuals so that larger projects can be completed and so that community can be built
      - 1. The first of these events took place in late Spring 2023
      - 2. The next event will be November 3-5, 2023
  - 4. Greater Kansas City Region of Disciples of Christ
    - a. Individuals & Roles
      - i. Regional Minister
        - 1. Provide Ministerial Support to Tall Oaks Board as needed
        - 2. Provide Conflict/Resolution Support if necessary
        - 3. Welcome at Tall Oaks Board meetings in an ex-officio capacity
      - ii. Regional Board
        - 1. Admit one member of the Tall Oaks Board as a liaison member and voting member of the Regional Board, as recommended annually by Tall Oaks Board
        - 2. Give Blessing for Tall Oaks Board's work
        - 3. Receive reports from Tall Oaks Board and give feedback
        - 4. Assist Tall Oaks Board in assessing Tall Oaks benchmarks
        - 5. Commit to using Tall Oaks for meetings or events when appropriate (Example: consider Tall Oaks as a location for a Board Retreat or Regional Assembly)
      - iii. Camp and Conference Coordinator
        - 1. Organize DOC camps in consultation with Camp Director and Camp & Conference Committee
        - 2. Promote DOC camps within the DOC congregations to raise our own numbers

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3. Develop relationships with DOC congregations so that our camping programs can meet the needs of diverse children, youth, adults, and families
  4. Report to Tall Oaks Board about any issues with Tall Oaks Staff on site for DOC camps
  5. Manage budget for DOC camping program, process registrations, send invoices to churches, and handle purchases/process receipts
  6. Assist Regional Youth Cabinet Adults as they facilitate our Regional Youth Cabinet
  7. Run background checks on all adults associated with DOC camping program
  8. May be invited to participate in Tall Oaks Board meetings as necessary
- iv. Ministry w/Young Disciples Chair/Camp & Conference Committee
    1. Work in partnership with Camp & Conference Coordinator
    2. Recruit directors for all DOC camps
    3. Select camp curriculum
    4. Create and maintain GKC Camp Manual of policies and procedures (including directors manual and counselor manual)
    5. Work with Camp & Conference Coordinator to address/respond to policy violations
  - v. Regional Treasurer
    1. Remit GKC Region's financial support (property taxes, ACA fees, and insurance, depending upon final decision) on an annual basis.
    2. Assist Tall Oaks Board in separating Tall Oaks and GKC Regional finances
    3. Advisory role to Tall Oaks Board as needed (especially during period of transition away from UCCR management of Tall Oaks)
5. Partnership with outside organizations such as: YouthFront, Boy Scouts, schools, etc.
    - a. Help bring in consistent revenue throughout the summer with additional camps to keep Tall Oaks sustainable
    - b. Share expertise and partnerships to help us improve Tall Oaks with the goal of becoming sustainable

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## WHY THIS PLAN WORKS & HOW IT IS DIFFERENT FROM THE STATUS QUO

Those who have followed and/or supported Tall Oaks for several years or more may rightly ask: “Isn’t returning to a model where we directly employ our own Camp Director just going back to what we always used to do?” This is a fair question, particularly since we know that there were significant challenges with “the way we’ve always done this.”

The short answer to this question is no. Why not? Because rather than looking unquestioningly back to the past, this plan takes a sober look at our history and supplements what was fruitful and healthy with new tactics that will work better in the midst of both our present situation and future needs.

The following breakdown provides more nuance for our answer:

1. **What We Bring Back:** In this plan, we return to local management of Tall Oaks. This includes employing a Camp Director who is both skilled and passionate about camp ministry who will run the facility. Oversight for the Camp Director will be provided by the Tall Oaks Board. The Camp Director will be encouraged to recruit a variety of staff types, including summer staff who will be recruited from former campers who have a love and passion for Tall Oaks.
2. **What is New to this Plan:**
  - a. Transparency: telling the truth about Tall Oaks’ challenges and needs (as well as its successes and potential) to the people of our Region
  - b. Capital Campaign with a bold vision for expansion and sustainability & Congregational Ambassadors to help tell the story
  - c. Diversified fundraising and grant writing
  - d. Very limited financial commitment from GKC Region’s general fund
  - e. Following through on the long-held desire to operate Tall Oaks as a (mostly) separate non-profit organization, including having separate finances.
  - f. Clearly defined roles and responsibilities for Tall Oaks Board members
  - g. Organized Volunteer Committee (which is already fully active and engaged)

Our plan prioritizes finding skilled individuals in our midst and putting them in the “right seats on the bus.” The new additions to this plan help to fill longstanding gaps in our Region’s approach to Tall Oaks.



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## INCOME

- **User Group Fees**
  - User Fees in 2022 brought in: \$397,741.00
  - Projected User Fees in 2023: \$456,201.00
  - This represents an increase of \$69,559.25 (18%) from 2022 to 2023
  - With new camps added in 2024 (and beyond) and new user group relationships developed, this number will continue to increase annually.
- **Christian Church Foundation fund distributions**
  - For the 2022 calendar year, Tall Oaks received \$32,465.44 in distributions
  - This number varies year to year based upon market performance. Given distribution numbers from previous years, it is reasonable to expect that most years would bring in distributions in a range from \$23k to \$34k.
  - Thus far in 2023 we have received \$14,376.82 in distributions (29.1% less than this time in 2022), putting us on track to receive \$23,027.74 if markets do not improve in the 3rd/4th quarters.
- **Other charitable gifts**
  - For the 2022 calendar year, Tall Oaks received \$28,599.32 in gifts from individuals and congregations
  - Thus far in 2023 we have received \$12,949.20. In addition to regular gifts that continue to come in throughout the year, if this plan is adopted at the September Regional Board meeting, the Tall Oaks Board will then call in the chips on the \$110k+ in pledges that were made in September of 2022. We anticipate that those pledged amounts will arrive in a late 2023 wave, followed by a significant number in 2024, and some remaining pledges arriving in 2025.
  - Tall Oaks is the beneficiary of a trust that is being finalized at this time. The expected gift from the trust is somewhere between \$60,000 - \$90,000 depending upon what is finalized with the family and lawyers. NOTE: this number is not reflected in the proposed budget at this time.
- **Capital Campaign**
  - The Tall Oaks Board is planning a robust multi-phased Capital Campaign that will contribute directly to maintenance projects, capital improvement projects, and reserve funds for operational sustainability.
  - Rob Morris, director of Christmount in North Carolina, has agreed to provide some of his experience and expertise to the Tall Oaks Board – he is currently 2 million dollars into a 3 million dollar capital campaign for Christmount.

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- **Regional Support**

- As a compromise with Regional leadership who do not support an annual distribution to Tall Oaks from the GKC General Budget, we have crafted a budget that does not include income from the Region, with the exception of two (or three) things:
  - We ask that GKC pay the property taxes/ACA fees on Tall Oaks each year since GKC will continue to be the land owners.
  - We ask that GKC continue to support the salary of their Camp & Conference Coordinator who runs the GKC camping program.
  - Additional possibility: the Regional Board could decide to also pay the camp's insurance as owners of the property.

- **Fundraisers**

- A primary task of the Tall Oaks Board will be to develop and organize fundraisers throughout the year.
  - Tall Oaks Gala
  - Spring Fundraiser
  - Other fundraisers that appeal to supporters from a variety of generations and income levels.

- **Grants**

- The Tall Oaks Board and Camp Director will work in tandem to continue pursuing grants for projects at the camp. This will include the work of volunteers until such a time as the Tall Oaks operations budget is capable of funding the part-time services of a paid grant writer.

## **2023 EXPENSES (2023 UCCR Totals)**

- Personnel: \$236,000
  - Site Director, Kitchen Manager, Part Time Staff
    - Administration
    - Payroll
    - Benefits
    - Training
- Insurance: \$64,800
- Food: \$46,359
- Maintenance: \$29,049
- Office Equipment/Supplies: \$3,562
- Utilities: \$74,580

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- Dues/Taxes/Assessments: \$1,758
  - **TOTAL: \$456,211**

## **2024 PROJECTED INCOME/EXPENSES (see attached budget document)**

- Personnel numbers in our budget reflect the following:
  - Full Time Staff:
    - Camp Director
    - Administrator
  - Part Time Staff:
    - Kitchen Manager
    - Maintenance Lead
    - Housekeeping Lead
  - Seasonal Staff:
    - Summer Staff (3-5 individuals, depending upon where we are with bookings/income going in to the summer months – this number is flexible due to both need and any possible budgetary constraints)
- The budget does not include income from the Capital Campaign or expenses that would be paid by the Capital Campaign

## **MILESTONES/BENCHMARKS**

(Note: the maintenance and capital improvement benchmarks will change depending upon the timeline/phases created for the Capital Campaign.)

### **APRIL 2024**

Transition from UCCR to Tall Oaks Board

Camp Director hired and onsite

Capital Campaign officially launched

Assess any Outstanding Maintenance.

Finances/Accounting Have been successfully moved to Miller Management

Tall Oaks Board has full responsibility for the Camp and has been Blessed by the GKC Region

Low Ropes course restoration project has begun

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## **ONE YEAR - APRIL 2025**

Capital Campaign continues to receive contributions -

Assess any Outstanding Maintenance.

Assess relationship with Director on Site and staff. Are they meeting expectations? How are they handling bookings and on-the-ground finances?

High-Ropes Course Restored

Carpeting Replaced in LLC

Pool maintenance/refurbishment completed

Roof replaced on Koinonia

Break-even year or in the black

## **BENCHMARK 1 - REASSESS POINT - APRIL 2026**

Questions to ask at this point in the plan:

Is the Board effectively reaching their goals? If not what pieces/people need to be moved to make them more successful.

Financial Situation of Tall Oaks?

Camp Director? Do we continue with this individual? What ongoing support or continuing education do they need to be fruitful?

Does there need to be any changes to the general plan for the next three years? Make note and add in adjustments.

DOC relationship with Tall Oaks: are they still providing support via site usage, have their bookings/participation increased, and do they feel increased ownership with the grounds?

Volunteer Committee - Is it working? Do they need any more help?

Results of Capital Campaign on Organization thus far? How much of campaign pledges has been received to date? Are we ready to begin building the second wing of the LLC?

## **THREE YEARS - APRIL 2027**

All Outstanding deferred maintenance projects from 2023 completed

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Capital Campaign donations continue to come in.

Breakeven Year or in the black

Assess any new maintenance needs.

Camp Director? Do we continue with this individual? What ongoing support or continuing education do they need to be fruitful?

## **FOUR YEARS - APRIL 2028**

Start on Lake Baier/Deever (a water feature project funded by the Capital Campaign)

Break-even year or in the black.

Assess any new maintenance needs.

Camp Director? Do we continue with this individual? What ongoing support or continuing education do they need to be fruitful?

## **FIVE YEARS - APRIL 2029**

Lake Baier/Deever Finished

Kayak and paddle boarding trainings for staff finished

Assess any Outstanding Maintenance that needs to be fixed before the busy season.

Camp Director? Do we continue with this individual? What ongoing support or continuing education do they need to be fruitful?

## **BENCHMARK 2 - REASSESS POINT - APRIL 2029**

Questions to ask at this point in the plan:

Is the Tall Oaks Board effectively reaching their goals? If not, what pieces/people need to be moved to make them more successful?

Financial Situation of Tall Oaks?

Camp Director? Do we continue with this individual? What ongoing support or continuing education do they need to be fruitful?

Do there need to be any changes to the general plan for the continuation of this plan over the next few years? Make notes and add in adjustments.

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DOC relationship with Tall Oaks: are they still providing support via site usage and do they still feel ownership with the grounds?

Volunteer Committee - Is it working? Do they need any more help?

## ANSWERS TO THE EXECUTIVE COMMITTEE QUESTIONS

- Ability to raise funds to pay for deferred maintenance without funds from our Region.
  - Tall Oaks Board will take over the ability to properly raise funds with a grant writer on the team as well as fundraising being one of their goals. Tall Oaks Board will come up with continued Fundraising Opportunities throughout their terms.
- Cash reserves to cover operational or maintenance needs without funds from our Region.
  - Capital Campaign (and calling in the chips on pledges to Tall Oaks made in September of 2022) will handle the initial list of deferred maintenance and get Tall Oaks back in shape for the coming years. Leftover from Campaign will be the cash reserves to maintain the property. Plan is for Tall Oaks to be self-sustaining and to have sufficient cash reserves to operate during leaner months.
- Definition of the organizational structure that will lead Tall Oaks.
  - See above **Key Elements, Roles, and Goals** for definition of what roles each group has to be successful within this Plan.
- Definition of how Tall Oaks, Camp and Conference, and the Region will work together into the future on decisions and items requiring Board approval for Tall Oaks.
  - See above **Key Elements, Roles, and Goals** for definition of what roles each group has to be successful within this Plan.
- Plan for how to maintain the current increased commitment and enthusiasm so that it doesn't diminish in future years.
  - Capital Campaign
  - Additional camps for those of all ages to attend camp and bring up DOC numbers. In 2023 we added a very well-attended Adult Camp and in 2024 we are adding a Family Camp to our offerings.
  - Development of relationships that result in new user groups both within and beyond our GKC Region
  - Opportunities for DOC campers to become summer staff
  - DOC Volunteer Committee
  - Restore relationships with our Tall Oaks supporters and users
- Definition of performance measures to gauge that Tall Oaks is being successful.
  - See proposed milestones/benchmarks listed above
- Action to be taken if performance measures and financial needs are not being met.

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- Reassessments every 2 years to study the efficacy of the plan.
  - Some summer staff can be cut if expenses are exceeding income
  - If a major financial need arises that we do not have funds to cover, the Tall Oaks Board will appeal to donors rather than expecting the GKC Region to cover those expenses.
  - If this plan ultimately fails, we will know that we have done everything in our power to make it work. We will then encourage the Region to prioritize selling the camp to another camp operator or to an individual/organization who will allow it to remain a campsite so that our regional camping ministries can continue on site.