2004

Sam Patch strategy

Kelley Coady

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The Sam Patch Strategy

Capstone Project

Kelley Coady

May 20, 2004
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Capstone Project - Report

Corn Hill Waterfront and Navigation Foundation

Sam Patch Packet Boat

Pittsford,
New York

Marketing Plan/Strategy - Report

Kelley Coady
The Corn Hill Waterfront & Navigation Foundation’s General Manager, Eric O’Neil, has many hats he wears in an ordinary day. Eric not only manages the Sam Patch Packet Boat, he also is the Executive Director and manager of all operations. On a monthly basis, Eric and the board of Directors come together to discuss the health of the Sam Patch and its ability to reach the community and teach the importance and significance of the Rochester area waterways. Eric is dedicated to his vocation; he however, felt sluggish about getting started this year. Our relationship started in September of 2003. Eric and I discussed the possibility to work together and bring the awareness of the Sam Patch to the surrounding communities.

Eric has had a relationship with the Rochester Museum and Science Center (RMSC) since 1986 to generate and promote the connection between the RMSC theatrical presenters and the programs available aboard the Sam Patch. However, this past year the RMSC’s financial shortfall did not allow them to promote the educational programs offered by the Sam Patch as they had done in the past, resulting in a gradual reduction of educational tours. In 2001 the tours consisted of 3226 children in 104 tours. In 2002 there were 2715 children in 95 tours and finally, it 2003 there were 2336 in children in 86 tours. The sinking level of tours obviously troubled Eric and the Foundation.

In September of 2003, I spoke with Eric and we discussed this situation. I had also found out that neither Eric nor the Foundation had formed a strategy for the Sam Patch. At this point in time, it finally became apparent that Eric needed assistance in furnishing the community with information about the programs available. The Foundation already faced a flex in year-
end net dollars and each year Eric and the members of the Foundation have to collectively manage to raise enough money or simply come up with the money out of their own pockets to cover the net income loses that usually fall between ten and thirty thousand dollars annually. This is a challenge in itself.

At first I decided we should make a videotape or CD of the programs offered aboard the Sam Patch so that Eric could mail them out to the local schools. However in late January 2004, I researched some of the schools and came to this conclusion: although a tape or CD was a good idea, not all surrounding schools have these kind of technological capabilities. This strategy was considered to be lacking the importance of our customers.

In researching new opportunities we next discovered that there is a large number of people that go to the malls in the whole Rochester area. Eric and I discussed the opportunity of handing out flyers at these local malls and that would certainly assist in gaining awareness among the community in a quick manner. Word of mouth is the best publicity of all. Although, this strategy needed to be researched further as well. I spoke to an insurance agent for the Wilmorite Properties at the Christopher Williams Agency and frustratingly enough, I was informed that handing out flyers would be considered illegal under the “No Solicitation” laws unless granted permission directly from the Wilmorite Properties Director of Marketing.

This became the start of my adventure with this project. I wanted to be successful and carry this project out for not only Eric and the Foundation but for myself as well. This was the “real” opportunity to show my educational abilities as well as my creative ability.
In the appendix specified below, you will find the focus of the project. Through the plan, the strategy grew and flourished for Eric and myself. Each aspect of the plan was created to take advantage of a variety of promotional opportunities that Eric and the Foundation had not been challenged with in the past.

*The detailed plan consists of the following focal points:* Each will describe the issues at hand and the strategy used to overcome the awareness issue in the community.

**Appendix 1**
- Executive Summary
- Situation Analysis
- Marketing Strategy
- Strategy Pyramid
- Financials
- Controls

Each focus held a new opportunity to explore and promote the Sam Patch. The following methods were used to create awareness in the surrounding communities.

**Appendix 2**
- **Flyer – Easter Bunny Arrival at Marketplace Mall Rochester, New York.** Statistics on the population was examined by Kera Selke, the Director of Marketing for the Wilmorite Properties. This is uncharted territory for the Sam Patch. Results from this event were very good. Families attending this event brought their children from 6 months
to 10 years old and in addition, the statistics show that most of these parents also have other children that did not attend the event ranging from 10 to 16 years of age per Kera Selke. This is fabulous exposure for the Sam Patch. Flyers were placed on tables with store coupons and coloring sheets. Good news is no flyers were found in garbage cans or used as coloring sheets. Parents took flyers along with other coupons. Traditionally, families use the coupons at other stores or return at a later date to utilize the coupons or flyer information gathered from the event. This results in getting the actual flyer to the house to be read and not used as a coloring book or trashcan liner.

- Research done by Kera Selke, tells us that parents tend to take these items home to read the materials and bring back coupons to shop in the mall on another day.

Clear exposure objectives achieved:

- Approximately 250 children attended the Easter Bunny Arrival Party
- Another 418 children visited the Bunny set during the weekend.

In this exhibit there is information on the malls trade area and customer demographics. This information was used to track the events success. The flyers placed next to the coupons proved to be an exceptional plan of attack.

Appendix 3

- **Connection with KidsOutandAbout.com website.** Connected with publisher Debra Ross and article writer Jackie Perrin to discuss opportunity for the web site as well as putting the Sam Patch in their new book. “Places to go and Things to do with family in Rochester,
New York. One entire chapter is dedicated to children and families to explore the most exciting adventures along the Erie Canal. Debra and Jackie have asked to use the Sam Patch as one of the starting ideas.

- **A raffle will also take place on the KidsOutandAbout.com web site.**

  KidsOutandAbout.com is a free community web service for anyone looking for great stuff to do with kids in the Rochester, NY area.

  This site allows many parents or teachers to view the site and return with hopes of winning a family package aboard the Sam Patch and will serve as another avenue to broadening the communities’ awareness. We negotiated with Debra Ross to receive one full page to promote the Sam Patch on their site. The Navigation Foundation would also agree to put the Kids Out and About.com link on the site.

  Debra and Jackie were in need of information along the canal and Eric would answer questions for them and then Eric would get free publicity on the Kids out and About.com site. Thus reciprocating our appreciation for promoting Eric and the Sam Patch.

*Appendix 4*

- **Invitations going out with new brochures to invite 3rd, 4th, 5th and 6th grade teachers on a Teachers Convention** along the Erie Canal in **June 2004**. This will give them a feel of the programs and the significance of the classes aboard the Sam Patch.
Appendix 5

- **New Brochure** will be sent out to the community. The old Brochures have too much information and can confuse the customer. The new Brochure holds only the educational programs offered by the Sam Patch and the RMSC and are tailored to the educator for their convenience.

Evaluating the outcome of my endeavors will be slightly challenging in that Eric and the Foundation will not reap the benefits from the strategy or the plan until the end of the season.

Therefore, the results discussed in the proposal will not be verifiable at this point in time. The results of this project that will be tracked are based on the **quality** of the **relationships** made through the strategy. Eric now has relations with Malls in the area for upcoming events for kids through Kera Selke, Director of Marketing for the Wilmorite Properties. Also, Debra Ross (publisher) and Jackie Perrin (article writer) for the KidsOutandAbout.com site offers the additional exposure needed to reach the community.

I also researched and gave Eric contact names for all the science, social studies and biology teachers in the Rochester area by school district. This information will be used to send out invitations to all the teachers for the Teachers Conference aboard the Sam Patch scheduled for June 2004. These relations are secure as long as Eric keeps in touch with each of them on a continuous basis.
I recommend Eric keep in constant contact with each of the above individuals. These avenues will provide a consistent exposure for the Sam Patch. I advise Eric to research and look for any opportunities, as we did in this project to promote the programs. Eric will always need to look for the prospect to promote the Sam Patch without costing the Foundation any additional money.

Through this project I was able to get Eric as well as the board of directors of the Foundation excited about promoting the Sam Patch again. With the downfall of support from the RMSC, their promotional resources have dwindled considerably. However, with the concentration on making and securing relationships such as I did for this project, the Sam Patch and the RMSC are well on their way to establishing the community awareness with the unique offerings of a non-traditional, outside the classroom learning event, for teachers as well as their families and friends.

I am also encouraging Eric and the board members review the plan at the end of the 2004 season. Each inquiry that is received asks about the Sam Patch should be captured along with names, addresses and the reason for call. The most useful information that needs to be collected is how they became familiar with the programs aboard the Sam Patch. This will reveal the community areas that are learning more about the Sam Patch and what areas they will need to focus their time and energy on.

On a final note, I encourage Eric to go online and send e-mails to all the Girl and Boy Scout leaders, directors of kids programs, children development programs anything dealing with children. These e-mails take time to circulate but usually they find their way to the right people or
organization. Sometimes this strategy is a shot in the dark nevertheless, e-mail does leave an audit trail. No company or organization wants to ignore a request from its customer or potential “word of mouth” customer. The free publicity is always worth the effort to generate or circulate requested information. This project has proven that continuous communication can pay off. You just have to be consistent as well as devoted to your objectives to achieve a successful strategy that works.

Although all of my education deemed significant, *Buyer Behavior, Planning and Evaluating Organizational Development along with Practicum in Consulting Organizational Development* assisted in the understanding of “real world” issues that companies face today. Focusing on the customer is a key element in creating a successful strategy. Eric lost sight of his responsibility to monitor his relationship with the RMSC. It is clear that Eric needed to counteract the lack of support from the Museum and devise a plan to create awareness of the programs he was offering.

Planning & Evaluating Organizational Development exposed strategic planning modules used to develop a strategic plan for an organization. This information clearly enabled the preparation stages of the strategic plan to raise the communities’ awareness of the Sam Patch and the educational value the programs can bring to the community.

Practicum in Consulting Organizational Development explored the role of a consultant to assist in determining organizational needs and assess business data and make
recommendations for intervention. This class offered me the ability to recognize problems within the Foundation. Evaluating their position and prepare recommendations for improvement. The SWOT analysis exposed the opportunity to recognize the Foundations strengths and weakness, opportunities and threats. These issues offered an understanding that the Foundation required a strategy to improve their situation. Clearly, the relationship between the RMSC and the Foundation needed more attention. In addition, the Sam Patch would need to promote themselves as well. If they did not take steps forward to promote the programs these classes would become to expensive to arrange without the proper audience and therefore be discontinued.

*Group Leadership and Theory of Human Resource Development* demonstrated the importance of understanding different personalities and how to best react to different people while gaining the necessary skills to interact successfully. These classes gave me the necessary skills to interact professionally with Eric and others in the Foundation. The result of learning “how” to facilitate a positive and informative meeting allowing the group to share valuable information and feedback that is relevant to the awareness strategy.

Our meetings were meaningful and productive because I could create a path I needed to follow in each meeting whether with the foundation, Eric or the Museum. This class gave me the understanding of people’s ability to learn and my ability to communicate confidently. I could communicate intelligently and found that this was one of the most important skills to preserve. Being confident and knowing you can communicate well while still creating a productive environment is a craft in itself. I enjoyed all the relationships created from this
experience not only for Eric but for myself as well. It will be exiting to see how this project will unfold for Eric and the Foundation. I will be staying on as a volunteer to Eric and am definitely looking forward to it.

This project exposed several skills I didn’t even know I possessed. I am a confident women and a determined one as well. I enjoyed this “real world” experience to the fullest and would not trade it for anything. The Capstone Project truly offers an opportunity to release all that you have learned over the years and form a whole new understanding for the “working world” and how to deal with corporate issues intelligently as well as successfully.
APPENDIX ONE

Capstone Project Marketing Plan & Strategy
Corn Hill Waterfront and Navigation Foundation

Sam Patch Packet Boat

Pittsford,
New York

Marketing Plan/Strategy

Kelley Coady
Marketing / Strategy Plan

Executive Summary

Situation Analysis
Market Summary
Target Market
Market Geographies
Market Demographics
Market Behaviors
Market Needs
Market Trends
Market Detail
Market Growth
Target Market Growth
SWOT Analysis
Alternative Providers
Services Offered
Key to Success
Critical Issues

Marketing Strategy
Mission Statement
Marketing Objective
Financial objective
Target Market
Positioning

Strategy Pyramid
Strategy
Tactics
Implementing Tactics

Financials
Break-even Objective
Total Operating Cost 2002-2003

Controls
Milestone Objectives
Monitoring Implementation
Marketing Organization
Contingency Planning
1.0 Executive Summary

The value of education is immeasurable. The Corn Hill Waterfront and Navigation Foundation (CHWNF) is a not-for-profit organization formed in 1991 to re-establish a presence on the Genesee River and Erie Canal. Their mission is to promote these historic and significant waterways in the Rochester area. Doing this by educating the public, students the media and government officials on the significance, influence and ecology of these waters.

The Sam Patch Packet boat is the most visible means to reach this goal. Corn Hill Navigation works closely with a number of local cultural institutions to spread their message most noticeably with the Rochester Museum and Science Center (RMSC). The Sam Patch offers educational programs to students from the 3rd grade through the 12th grade. This is possible by the relationship the Sam Patch has with the RMSC.

The RMSC takes students on a voyage of discovery. The RMSC offers two local water study programs aboard the packet boat Sam Patch on the Erie Canal. Students explore and discover the significance and exciting history of the Erie Canal and become research technicians through direct, hands-on experiences. The programs are made possible through the theatrical efforts of RMSC and their relationship with the Sam Patch Packet Boat and the Foundation. The Traveling School of Science cruises the canal along the Sam Patch allowing students to collect data and experience the technology, history and significance of the canal lock system.

2.0 Situation Analysis

The Sam Patch, General Manager, Eric O’Neil, runs Rochester’s Authentic Canal experience. Eric has been faced with a decline in educational program tours in the last few years. Eric has been active with schools involved in the Genesee River Valley project and in 1998
launched an educational partnership with the Rochester Museum & Science Center (RMSC). His mission is “to provide creative access to, and greater awareness of our community’s historic waterways. With education as our primary focus, we offer a variety of informative programs and community events to bring that mission to life” (Sam Patch Brochure, www.sampatch.org).

This mission has been set forth for many years with the interest and partnership between the Corn Hill Waterfront Navigation Foundation and the Rochester Museum & Science Center. However, in the past few years the RMSC has not promoted the educational events offered by the Sam Patch as they did in the past. Due to the lack in finances, the museum has not been able to hire personnel as in previous years. As a result of lowered participation from the museum, Eric has been faced with a considerable decline in educational tours and is in need of a Marketing Plan to gain back and advance the amount of educational tours provided by the Sam Patch and the Foundation.

Presently, the Museum offers a geological and biological experience aboard the Sam Patch during the early spring and the late fall. During the summer, Eric has tried to promote his own field trips by offering a local expert to discuss area history and health of the waterways on board the Sam Patch.

2.1 Market Summary

The Museum has not promoted the tours as they have in the past and Eric, as well as the Foundation, has felt the impact. The challenge is to create a Marketing Plan for Eric so he may increase tours while concurrently increasing the educational opportunities offered by the Sam Patch and the Foundation. Depending on the RMSC to promote the programs alone is not
presenting positive results. Additional marketing efforts will be the only way to experience growth and increase the interest in these programs.

2.2 Target Markets

The target market consists of children in grades 3-12 with an interest in exploring and discovering new opportunities. The Sam Patch is also targeting parents, educators, scout leaders and clubs of all kind. Sam Patch offers a unique and valuable experience for children to learn about their community and the environment surrounding the Erie Canal.

2.3 Market Geographies

The Sam Patch is located on the canal in the center of Pittsford’s Shoen Place, making it accessible to just about every town in the Rochester area. The Foundation is gaining the flexibility to establish a new facility in the Corn Hill district giving them greater access to a wider audience. Currently the Sam Patch is restricted to the Pittsford Port limiting contacts, but they are focused on growing to eventually encompass the Corn Hill area as well.

2.4 Market Demographics

Most people who attend a class on the Sam Patch are looking for a new and exciting way to learn. Since school boards or other groups need to have a budget in place to accommodate field trips the tours are sometimes difficult to gather unless contacted early in the season. Once they are conscious of attending a field trip they are glad to be a part of the event. The adults who have brought the children there have made a conscious decision about how they wish to educate and entertain these children. These people can be of any age, any nationality, and any gender. We have low-ticket prices so we can include all levels of economic status, even with a higher discount for the city school district. The common factors, however, are the following:
Value education and learning styles.

Usually educators who have students between the 3rd – 12th grades.

Background of exposure to sciences or social studies programs.

Ages vary from 7 years of age to adulthood.

Value alternative learning.

Value the experience and time spent with family and friends.

2.5 Market Behaviors

Teachers and students want a variety of ways to teach and learn. The live performances aboard the Sam Patch will energize the curriculum and make the experience unforgettable and most importantly the ability to learn outside of the classroom with a “hands on” opportunity. However, the frequency that a teacher will decide to choose the Sam Patch as an outside classroom is most likely once a year. This is why it is important to reach out to the community to allow parents, members of the scouts and children centers to also participate in the rare experience.

2.6 Market Needs

The value in learning and experiencing new things is immense. With the assistance of the RMSC the Sam Patch offers educational programs for children in the 3rd through 12th grade. These field trips offer a new and interesting addition to traditional learning. The tours are always a new experience for the audience and offers new insights to understanding the historical significance and impacts of the Genesee River and Erie Canal in a non-traditional setting.
2.7 Market Trends

The trend in education is towards breaking traditions and discovering new ways in how to teach and how to better relate to students. The call for something new is where the Sam Patch steps in. Not only does the Sam Patch offer information about the waterways but also performances that draw from history, presented in a new format; outside the classroom. Sam Patch offers an alternative to traditional learning with the unique opportunity to educate and accommodate the community with learning programs as well as leisure tours and this sets them apart from the competition.

2.8 Market Detail

Alternative Education - a definition

Alternative approaches to education have existed concurrent to the development of public education over the last 200 years. In the USA, alternatives within public education have been documented since the arrival of the pilgrims (Young 1999). The concept or term - alternative education, has been used throughout this time to describe various programs and approaches.

Morley (1991) draws on a number of writers to define alternative education. He states, 'Alternative education is a perspective, not a procedure or program. It is based upon a belief that there are many ways to become educated, as well as many types of environments and structures within which this may occur.'

Generally, alternative education comes from recognition that all people can be educated. It is in the general interest of society, and the varied communities with form a society, that educational opportunities are provided to enable each individual to find a learning environment in
which they can participate. Only through this participation can individuals receive the general education that prepares them for inclusion into the community.

Therefore, alternative education is a means of incorporating a variety of strategies and choices of environment within the school system to 'ensure that every young person finds a path to the educational goals of the community'. (Iowa Association of Alternative Education).

Three avenues for presenting alternative education can be identified across school systems:

1. Alternative schools - both public and private
   2. Alternative programs for students using varying approaches for students to pursue common goals with the same school.
   3. Teaching strategies, beliefs and support services that facilitate growth in academic, personal/social and career development initiatives. (The Real School, Regional Educational Alternative Learning).
Here is a study done on the increasing interest in Alternative Education in Minnesota

**Alternative-Education Programs** - The ‘Quiet Giant’ in Minnesota Public Education
The first in a series of reports on the changing face of public education in Minnesota - **June 2003** - A joint venture of the Center for Policy Studies and Hamline University

There is a growing national interest in creating new and different opportunities for children to learn. Since the mid-1970s, Americans have been grappling with how to improve
public education, recognizing it as the primary vehicle for advancing knowledge, which has quickly become our nation’s key strategic asset in today’s global economy. This information may assist in understanding that there are advantages to Alternative Learning that are competition has not yet explored.

2.9 Market Growth

The market trend discussed in the previous topic points toward a vastly growing market in alternative education and learning outside of the classroom. It is time to take advantage of this and create growth in our audience by expanding our tours beyond our home community and the Corn Hill district and throughout the Rochester area. The estimated growth pattern for Educational tours, Daily Boat tours and Public tours are as follows.

2.10 Target Market Growth

Desired increase in tours with Marketing Plan & Strategy

<table>
<thead>
<tr>
<th>Target Growth</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Education</td>
<td>32%</td>
</tr>
<tr>
<td>Daily Boat Tours</td>
<td>10%</td>
</tr>
<tr>
<td>Public</td>
<td>20%</td>
</tr>
</tbody>
</table>
2.11 SWOT Analysis (Strengths, Weaknesses, Opportunities & Threats)

The following is an outline of The Sam Patch’s strengths, weaknesses, opportunities, and threats. Currently the strengths and opportunities outweigh the weaknesses; however, the weaknesses punctuate the need for more of the following resources: support, awareness, and funding.

**Strength –**
- Dedication of volunteers and management.
- Creative company members.
- A cooperative work environment.
- Members are well educated in areas of expertise.
- Efficient in use of materials and knowledge.
- Low overhead and designed to adapt to the market's needs.
- Offering an affordable and learning experience/environment.
- Strong Relationship with the Corn Hill Waterfront and Navigation Foundation
- Canal Town “Clarion” Newsletter designated for the Sam Patch

**Weaknesses –**
- Limited support from RMSC
- Limited awareness among the public.
- Limited financial resources

**Opportunities –**
- Visit malls, school and children’s centers to gain awareness in the community
- Excellent reviews of previous tours.
- Letter of recommendation from local school district head.
- Gaining web presence on RMSC site.
- Need for non-traditional learning.
- Diminishing experiences offered through schools and other publicly supported activities.
- Gain new volunteer assistance

**Threats –**
- Loss of funding.
- Bad reviews.
- Change in audience attendance (most hurtful).
- Competitive experiences.
Challenges to filling RMSC’s performance dates.
Challenges to filling up regular daily tours

2.12 Alternative Providers – Competition to Sam Patch

Understanding the capabilities of the competitor can assist in understanding your own competitive advantage. Researching what the competition has to offer and comparing it to what the Sam Patch offers will expose a competitive advantage of the Alternative Learning that only the Sam Patch offers in this area.

1. **Adventure Calls Rafting** - Boating & rafting excursions in Letchworth State Park. 33 Swan St., Batavia, NY 14020 - 585-343-4710

2. **Sam Patch Tour Boat** - Tours on the Genesee River & Erie Canal. 12 Corn Hill Terrace, Rochester, NY 14608 - 585-262-5661


5. **Canandaigua Lady** - 19th century paddlewheel replica; lunch, dinner cruises on Canandaigua Lake. 169 Lakeshore Dr., Canandaigua, NY 14424 - 585-394-5365 - www.canandaigualady.com

6. **Keuka Maid Dinner Boat** - 500 passenger boat tours on Keuka Lake; buffet. Rt. 54, Champlain Beach, Hammondsport, NY 14840 - 607-569-2628

7. **Lockport Cave & Underground Boat Ride** - Guided history tours; Erie Canal, 1600s water-power tunnel. 21 Main St., Lockport, NY 14094 - 716-438-0174 - www.lockportcave.com

8. **Lockport Locks & Erie Canal Cruises** - 2 hour narrated tour through 50’ locks. 210 Market St., Lockport, NY 14904 - 800-378-0352 or 716-433-6155

10. **Miss Buffalo, Niagara Clipper Cruise Boats** - Sightseeing, lunch & dinner cruises on Lake Erie & the upper Niagara River. Erie Basin Marina, Buffalo, NY 14202 - 800-844-8684 or 716-856-6696 - www.missbuffalo.com

11. **Grand Lady Cruises** - Cruises on the upper Niagara River with casual to gourmet dining. 100 White Haven Rd., Grand Island, NY 14072 - 888-824-LADY or 716-774-8594


**2.) Sam Patch Packet Boat**

Operators of the 19th Century Replica *Sam Patch* Packet Boat

![Sam Patch Packet Boat](image)

The 2004 season runs May 3rd through October 30th. There are daily cruise schedules or new charter packages for more information about the Educational programs contact the Sam Patch in Sheon Place!

2.13 Services Offered-

*Directly from the Corn Hill Navigation Foundation, the Sam Patch offers the following presentation of programs; Waterways History and Ecology, The Amos Eaton Traveling School of Science and A River Runs Through Us.*
Waterways History and Ecology:

Includes lecture on area history and health of the Erie Canal in support of its significance to the surrounding communities of Rochester, New York.

The Amos Eaton Traveling School of Science:

Students are transported back to 1826, to a historical meeting with Professor Amos Eaton. They experience his voyage of discovery, when he and his students journeyed on the Erie Canal from Albany to Buffalo. This is a two-hour interactive theater experience is a total immersion museum theater performance that includes hands-on activities and exposes the technology of a canal lock system. This program is in partnership with the Rochester Museum & Science Center.

A River Runs Through Us:

A two-hour hands-on as well as an inquiry-based program, focused on the local history, ecology, and health of the Genesee River and Erie Canal. Students act as biologists, chemists, and research technicians to collect and interpret data collected on site. Teacher Guide with background information will be sent with your confirmation. This class meets New York State math, science and technology standards. This program is also in partnership with the Rochester Museum & Science Center.

Among these programs, the Sam Patch is not just an outdoor classroom. The Sam Patch offers Charter packages for parities, weddings, formal dinners and corporate charter as well.

Comparing competitor’s offerings ascertained that the Sam Patch has the unique competitive advantage with the programs and public tours they offer. As shown above, there is
plenty of competition in the Rochester area for public and chartered tours. However, the Sam Patch does offers more than just a luxury ride along the canal. The Sam Patch has found that it has something unique to share with the community. They have the relationship with the Rochester Museum and Science Center that allow the Sam Patch to offer this unique alternative education in science, social studies and biology.

The programs are distinctive in that the classes aboard the Sam Patch are the only of its kinds in the Rochester area for boating and learning. Children can receive credit for taking the classes for the reason that all programs are in line with the New York State Learning Standards.

The competition does not exceed the educational competitive advantage that the Sam Patch can offer. This is what the Foundation must focus on to advertise successfully and gain a competitive awareness in the community especially when the Sam Patch and RMSC can deliver such unique programs.

2.14 Keys to Success

- Funding to support the foundation
- The relationship with the RMSC
- Market Awareness of unique competitive advantage – educational tours in addition to Public and Chartered Tours
- Community Involvement
- School and Club Participation
- Completion of the Corn Hill facility
2.15 Critical issues

The major issue is the lack of community awareness. The foundation is dedicated to keep the relationship with the RMSC however; the lack of audience has resulted in the reduction of tours all together. If this lack in effort of community awareness continues to decline it will be difficult to grow or even sustain the programs. Although, with the increased efforts to gain awareness among the community and the innovation of the company, implementing plans and strategies will assist in growing the audience and increase the tours and boost the business simultaneously.

3.0 Marketing Strategy

Marketing Strategy

The marketing strategy will revolve around expanding the awareness of the educational programs offered on the Sam Patch made possible by the RMSC. Combining information and efforts to strengthen relationship with the local community is imperative. The key strategy is informing the community about these programs and by getting out into the local area malls, schools, and visiting scouts or clubs to remind them that these classes are completely supported by the NYS standards. The strategy is based on the fact that awareness creates sales and quality performances generated by repeat ticket sales and rewarding recognition that results in a positive increase in tours.
3.1 Mission statement

To create and foster knowledge, understanding, enjoyment and awareness of the historical significance, human and economic impact, science and ecology of the Genesee River and Erie Canal through the operation of an historic replica packet boat and the offering of school, community and public programming.

To achieve our mission we offer educational programs for school districts, scout groups, community groups, and children's centers. Programs vary from an hour to 2 hours, depending on age and availability.

3.2 Marketing Objectives

The objectives are clear in that there is a desperate need to increase the audience and expand it while gaining awareness of the programs and cruises available to the Rochester Community. Specifically, with in the school districts, children’s clubs and the local area parents.

3.3 Financial Objectives

The financial objectives include the following:

- Increase community awareness of educational tours as well as Public and Daily Boat tours.
- Increase the combined tours by 62%.
  - Educational tours by 32%
  - Daily Boat tours by 10%
  - Public tours by 20%
- Increase memberships programs by 10% (Board of Directors responsible for this increase).
• Meet or exceed financial obligations for the fiscal year of 2005 with combined interest from the Strategy and Board of Directors endeavors.

3.4 Target Market – Educators, 3-6 grade Community and Parent.

We are targeting a general audience that consists of adults, children interested in learning about the waterways of the Erie Canal. We are also targeting parents of children from the ages of 8 to 17 for the theatre performances held on the Sam Patch. Another target market is the educator in the 3rd – 12th grades. We offer a unique and valuable experience for their students and themselves with performances and a real hands-on approach to learning.

3.5 Positioning

For educators and parents alike who value education and positive experiences, The Sam Patch along with the RMSC offers an awareness strengthening and educational theatrical experience for the children and the educators involved.

Unlike other classroom options, the focused energy is on education and entertainment for the students and participants with innovative and informative hands-on strategy. The Sam Patch wishes to position themselves as having a unique educational path as well as an entertaining ride or tour along the canal.
4.0 **Strategy Pyramid**

4.1 **Strategy**

Strengthen the relationships with 3rd, 4th, 5th and 6th grade teachers in the school districts, the RMSC, major supporters and increase awareness throughout the Rochester area coming in contact with our target markets. Listing of target areas in Rochester:


4.2 **Tactics**

- Research RMSC
- Research school administrators
- Research school Superintendent and Directors of curriculum
- Research different volunteer opportunities
• Research Internet opportunities such as Kidsout&about.com

• Plan to attend Malls to hand out specific promotional information (reach parents) (need volunteers)

• Research Camp Leaders

• Plan to do Mailings

• Plan to collect Customer Data

• Research Foundation

• Research alternative education trends for status or increased support

4.3 Implementing tactics

Malls, Schools, Scouts. Letters & promotional materials needed to increase awareness of the Sam Patch programs in the Rochester community.

• Continually collect inquiry data for analysis – Name, from what county, why they wish to go on the Sam Patch and where did they hear about the Sam Patch, reason for attending a class or for entertainment only.

• Mailings of informational brochures to area school districts and districts in other counties – Find addresses to Superintendents and Directors of curriculum and give information to them – important to mention that two classes are part of NYS standard

• Create General Electric’s, Elfun volunteer proposal worksheet asking for approval to gain volunteers for mailings and mall trips

• Send information to Jackie Perrin who puts up article for the best place to take kids all year round. Would like for her to put an article on the Kidsout&about.com web site to entice parents to participate in the tours on the Sam Patch
• Attending local malls to handout promotional materials focus on parents and children
• Contact school districts and administration
• Contact local Camp leaders

5.0 Financials

Financials

Right now, The Foundation relies on the RMSC performances aboard the Sam Patch as well as public charters, which gives them net sales after costs of approximately $147,000 in 2002 and fell to $138,000 in 2003. We expect to grow in audience by 62%, which will increase our sales and decrease the non-positive flex in cash of $5,000 to $30,000 net income annually. Each year this amount of money falls short due to lack in sales and requires the Foundation to carry a substantial credit line or replenish the dept from their out-of-pocket expenditures.

5.1 Break-even Objective

If ticket sales and book sales were to increase it would be a considerable assistance to the $5,000 - $30,000 unfavorable flex in cash year over year. If the flex can be lowered it would also increase the ability to gain better educational materials. An increase in awareness would clearly show we captured the correct audience and it would point out our strategy is a successful approach to increasing ticket sales. Book sales have been deemed a responsibility to the Board of Directors. It is imperative to decrease the flex at year-end and the only option to do this is to increase ticket and book sales as well as grow relationships in the community. Year-end net income for 2002 was $20,269. In 2003 net income showed ($7,453) overall. Net income expected for 2004 must break $21.000 to show a significant increase in income. However, if an increase
occurs this would put their net income back to the same level as the 2002 year-end income. This is a good start and it would prove the strategy is successful and it must be continued in the future.

5.2 Total Operating Expense 2002 vs. 2003

Revenue

<table>
<thead>
<tr>
<th>Jan-Dec 03</th>
<th>Budget Jan - Dec 03</th>
<th>Jan-Dec 02</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenues</td>
<td></td>
<td></td>
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<tr>
<td>Income - Boat Tours</td>
<td>95,638.90</td>
<td>83,400.00</td>
</tr>
<tr>
<td>Income - Charter - Public</td>
<td>34,140.00</td>
<td>35,000.00</td>
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<tr>
<td>Income - Charter - RMSC</td>
<td>1,575.00</td>
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<tr>
<td>Income - Charter - Public Ed.</td>
<td>7,670.00</td>
<td>8,000.00</td>
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<tr>
<td>Income - Meals/Beverages</td>
<td>40,734.60</td>
<td>44,000.00</td>
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<tr>
<td>Income - Souvenir</td>
<td>502.20</td>
<td>500.00</td>
</tr>
<tr>
<td>Book Sales - Erie Canal</td>
<td>5,969.17</td>
<td>8,000.00</td>
</tr>
<tr>
<td>Book Sales - Legacy</td>
<td>0.00</td>
<td>0.00</td>
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<tr>
<td>Book Sales - Runnin' Crazy</td>
<td>3,253.00</td>
<td>700.00</td>
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<tr>
<td>Book Sales - Pictoral</td>
<td>410.00</td>
<td>900.00</td>
</tr>
<tr>
<td>Book Sales - Where They Fell</td>
<td>0.00</td>
<td>0.00</td>
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<tr>
<td><strong>Total Revenues</strong></td>
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<td><strong>180,500.00</strong></td>
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Direct Cost of Sales

Cost of Sales

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<th></th>
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<th>Budget Jan - Dec 03</th>
<th>Jan-Dec 02</th>
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<tbody>
<tr>
<td>Coupons</td>
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<td>600.00</td>
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<td>Discounts/Comps</td>
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<td>Food Costs</td>
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<td>Beverage Costs</td>
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<td>Commissions</td>
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<tr>
<td>Simply Certificates Costs</td>
<td>0.00</td>
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<td>0.00</td>
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<td>RMSC Expenses</td>
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<td>0.00</td>
<td>5,400.00</td>
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<td>Cost of Where They Fell Books</td>
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<td>Other Direct expenses</td>
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<td>Linen Costs</td>
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<td>Winter Storage Expense</td>
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<td>Development fees</td>
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<td><strong>Total Cost of Sales</strong></td>
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<td><strong>47,800.00</strong></td>
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### Expenses

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<thead>
<tr>
<th>Item</th>
<th>Expenses 1</th>
<th>Expenses 2</th>
<th>Expenses 3</th>
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<tbody>
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<td>Wages - Crew</td>
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<td>Wages - Administrative</td>
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<td>Employer FICA</td>
<td>5,392.39</td>
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<td>Employer FUTA/SUI</td>
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<td>Insurance - General</td>
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<td>Insurance - Workers Comp/Dbl</td>
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<td>850.00</td>
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<td>Insurance - Health</td>
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<td>Advertising Expense</td>
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<td>12,000.00</td>
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<td>Fuel Expenses</td>
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<td>Licenses &amp; Permits</td>
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<td>Repairs &amp; Maintenance</td>
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<td>Accounting Fees</td>
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<td>Bank Fees</td>
<td>986.83</td>
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<td>Cash (Over)/Short</td>
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<td>Consulting Fees</td>
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<td>Credit Card Fees</td>
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<tr>
<td>Data Processing Fees</td>
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<td>Depreciation Expense</td>
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<td>Dues &amp; Subscriptions</td>
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<td>934.00</td>
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<td>Loan Interest</td>
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<td>Membership Mailings</td>
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<td>Office Supplies</td>
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<td>750.00</td>
<td>857.17</td>
</tr>
<tr>
<td>Computer Rental &amp; Expenses</td>
<td>376.28</td>
<td>375.00</td>
<td>375.72</td>
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<tr>
<td>Taxes</td>
<td>60.00</td>
<td>75.00</td>
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<td>Telephone Expenses</td>
<td>4,650.50</td>
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<tr>
<td><strong>TOTAL Operating Expenses</strong></td>
<td><strong>155,374.37</strong></td>
<td><strong>140,150.00</strong></td>
<td><strong>139,385.29</strong></td>
</tr>
</tbody>
</table>

Net Profit from Operations: $<17,017.98>\quad <7,450.00>\quad 7,758.83$

### Other Income

<table>
<thead>
<tr>
<th>Item</th>
<th>Expenses 1</th>
<th>Expenses 2</th>
<th>Expenses 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Income - Miscellaneous</td>
<td>523.12</td>
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<tr>
<td>Income - Interest</td>
<td>0.00</td>
<td>0.00</td>
<td>1.82</td>
</tr>
<tr>
<td>Income - Memberships - General</td>
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<td>2,000.00</td>
<td>&lt;50.00&gt;</td>
</tr>
<tr>
<td>Income-Memberships-UpperTier</td>
<td>5,993.56</td>
<td>15,000.00</td>
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</tr>
<tr>
<td>Income - Grants</td>
<td>100.00</td>
<td>10,000.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>
The decline in net income has persuaded the Foundation to take action towards promoting their educational tours. These results cannot continue or the fate of the educational programs aboard the Sam Patch will not be available.

### 6.0 Controls

*Controls*

This plan will go into action by March of 2004. Sam Patch would like to see growth progressing by the 2005 season. The strategy is to connect with the community, school districts, laying the groundwork for a secure Spring and late Fall 2004 season of tours. Through the months of March, April and May of 2004 the efforts to increase the awareness among the community will be monitored through data collection and continued determination to seek successful strategy opportunities.

Inquiries will be analyzed for growth in late May and reviewed by Eric throughout the year. Depending on the opportunities researched the effect will result in a rise or fall in the 2004 – 2005 seasons success. The strategy is in place to capture as much opportunity to spread awareness regarding the Sam Patch programs in the community as possible. Dedication to
spreading the word and continually searching for awareness opportunities should prove to be a strong strategy now and in the future.

6.1 Milestone Objectives

- Finish Preliminary Proposal for approval
- Contact and meet with Eric at Sam Patch request contact info for RMSC
- Contact RMSC – Wanda Wolf – Manager for information – 271-4552 ext.377
- Research Corn Hill Navigation web site and learn about Sam Patch
- Research Volunteer organization opportunity
- Attend Elfun meeting
- Write Elfun Proposal for committee approval
- Get flyer information together on Sam Patch and RMSC offerings
- Met with a member from PTA board - find out who to contact to reach local schools – “WHO TO TARGET” for best results
- Search local area Superintendent and directors of instruction for Rochester area
- Research and contact local Malls to achieve approval for handing out flyers –where is there opportunity…
- Research Boys and Girls Scout contacts
- Research for other avenues or marketing opportunities not yet explored by the Foundation members
6.2 Monitoring Implementation

09/04/03 – Met Eric for the first time to discuss project

10/30/03 – Researched the Amos Eaton Traveling School of Science aboard the Sam Patch to get a feel for what children experience on the tours

Jan – Feb- 04 – Researched RMSC and Corn Hill Navigation Foundation for knowledge of background for Sam Patch and RMSC functionality

02/19/04 – Preliminary Proposal approved

03/05/04 and 03/09/04 - Contacted Eric and Sam Patch to review information and goals and asked for RMSC contacts

03/8-12 /04 – Research Erie Canal and potential competitors

03/08/04 – Researched for volunteer program or promotional opportunities

3/09/04 – Started Marketing Plan research and strategy

03/10/04 – Attended Elfun presentation to find out more about the volunteer programs available

3/16/04 – Wrote Elfun proposal

03/17/04 – Met with members of the PTA board to discuss whom I should contact or request information about the classes available. WHO TO TARGET - superintendents and assistant superintendents of instruction (would like to get volunteers to assist in the mailings)

3/18/04 – sent Elfun proposal to committee and William Maher and delivered hard copy to Director Shirley Murphy

3/18/04 – Sent e-mail to Monroe County School Board
Judy_Wadsworth@boces.monroe.edu requested directors of instruction (received list on
3/19/04 requested Superintendent names and addresses)

03/19/04 - Contact Wanda Wolf at RMSC – discuss opportunities to promote the Sam
Patch

03/21/04 – Put together sample flyer with Sam Patch info and RMSC info to hand out –
Pending Eric O’Neil’s approval

03/22/04 – Met with Betty Barrette from the Christopher Williams Insurance Agency for
the Wilmorite Properties for legal issues on Mall security laws – She said I would need to
get permission to trespass.

3/23/04 – Researched and contacted Kara Selke, Marketing Director for Wilmorite
locations, Eastview, Pittsford Plaza and Marketplace – left message to discuss possible
locations to hand out flyers on Wilmorite properties

3/23/04 – Contacted Parks and Recreation Center for Rochester - Commissioners Office
428-6749 – They cannot support any event not run by the City of Rochester. Suggested
Genesee Parks and Recreation.

03/23/04 – Sent e-mail requesting contact information for the Rochester area girls scouts

03/23/04 – Kara from Wilmorite called back and we agreed to put flyers at Marketplace
Mall during the Easter Bunny Arrival (Sat. morning 3/27/04)! Will place at customer
service (will be seen when strollers are rented etc.) and right at the Easter Garden near the
Easter Bunny picture taking. Need to get flyers made and to her by Friday, 03/26/04.

3/23/04 – Sent e-mail to both the boy scouts and girl scouts requesting contact info for the
Rochester area chapters
3/24/04 – Met with Eric to discuss Flyer and make changes – will have for Friday to show the Marketing Director for the Easter Bunny Arrival at Marketplace Mall Sat. morning.

03/24/04 – Researched web sites for opportunities such as kid’s events parent events. Found excellent site. Sent information to the publisher, Debra Ross to suggest that we ask travel author, Jackie Perrin to put an article on the KIDS OUT AND ABOUT web site. This site is designed to give parents ideas on spending time with their families or what fun classes or camps to attend. These are healthy ideas for kids of all ages. This is a great opportunity.

KIdsOutAndAbout.com is a free community web service for anyone looking for great stuff to do with kids in the Rochester, NY area. ross@KidsOutAndAbout.com
Received this response and opportunity from the publisher.
Kelley,

Thanks so much for sending along the flyer!

First question: I'm assuming you do this for home school groups as well. I am in the process of putting up a new "classes and camps" section and I'm thinking it might be cool to list this under the home school section. If so, can you give me whatever you'd like as a two- or three- sentence blurb?

Second, and more important: Jackie and I are not only interested in talking with you more, but we happen to be writing a book together on family-friendly things to do in the greater Rochester area. And we're devoting a whole *chapter* to stuff to do on and along the Erie Canal, and what you should tell your kids about the history. So perhaps there might be an opportunity for us to visit with you (and maybe bring our families, so we can speak with personal experience about what it's like), learn what we can, get some recommendations from you about other things that are worthwhile on the Canal, etc. Would you be interested?

Debra

03/25/04 – Left messages for Eric O’Neil – Need to approve my changes to the flyer.

03/26/04 – Discussed Easter Event for Sat. Had copies made of flyers to hand out at the Marketplace Mall Easter Bunny Arrival. Made an appointment with Eric for Tuesday at 10:30 am.
03/26/04 - Meeting with Kara Selke (Director of Marketing for Wilmorite properties) at 5pm to discuss Sat. event and get flyer to her as well.

03/26/04 - Discussing a meeting with Eric O’Neil (Executive Director of Navigation Foundation), Debra Ross (Producer of KidsOutandAbout.com) and Jackie Perrin (writes articles for kids out and about). This will be an information-sharing event Friday April 2nd.

03/27/04 – Easter Bunny Arrival at Marketplace Mall!

03/29/04 – Spoke with Debra Ross and Jackie Parrin of KidsOutandAbout.com. Eric and I will meet them on Friday April 2nd to discuss web site opportunity and give information to Jackie and Debra about the Sam Patch so they can add it to their new book!!!

03/29/04 – At the RMSC – Met with Eric to discuss additional support opportunities to promote The Sam Patch. I did not feel we had all our bases covered as of yet. Felt we could go farther with our efforts.

03/30/04 – Meet with Eric and discussed Marketing Plan in detail. Discussed financials, budget and additional strategy opportunities. I researched the Monroe School District and was able to retrieve the names of the Assistant Superintendents of Instruction. Eric was thrilled with the information. He would like to add this info to his address list for continual mailings. I decided that a mailing should be done in April. Because funding is very limited, I said I would chip in to assist with the mailings (stamps, envelopes and printing of the labels to get into the mail for April). Will be researching the School District further to find each level (Elementary, Middle and High Schools) in the Monroe County. Would like to reach the Social Studies and Science teachers in the Middle Schools and High School as well as the principal’s of the Elementary Schools for additional mailing opportunities. Also discussed Friday’s agenda. Meet with Jackie and Debra at Strong
Museum for information sharing and get an understanding of what they expect from Eric and myself as well as what information we can offer to be put into their book and on the Web site to promote the Sam Patch.

04/01/04 – Sent reminder e-mails to Debra, Jackie of Kids out and about and Eric of Sam Patch to meet at 9:30 at the Strong Museum

04/02/04 – Meet with Eric, Debra and Jackie to discuss new avenues and share information and new opportunities to promote Sam Patch. Needs met – Eric’s need for awareness and Debra and Jackie need information about the canal from Eric and I for their book and to put information up on the Kids out and about web site. Discussed different ideas about what to put in the book and on web site and most importantly how to gain awareness for Sam Patch and the Foundation. Ideas we came up with are to put a link on the web sites. One link for the Sam Patch on the Kids Out and About site (KidsOutandAbout.com site) and one for the Sam Patch site for the Kids Out and About (reciprocating efforts to increase exposure). Also, one of our best brain storming ideas came about when we decided we could put up a raffle on the Kids site raffling off free tickets to a family package aboard the Sam Patch. We also decided to contact 4th, 5th and 6th grade Teachers and invite them and a friend or sibling to join us for a Teachers Conference aboard the Sam Patch so they can see what it’s like and offer their students the opportunity to explore the Sam Patch as well. Jackie and Debra agreed to have one whole page on the Kids site dedicated to the Sam Patch. It will persuade parents to ask their children’s 4th, 5th and 6th grade teachers to also consider this adventure. This information will give high exposure to the Sam Patch because it will be placed under the “Where to go” page of the Kids web site. Parents will see this information because they are looking
for something to do with their children. This site will also target a new path for “Home Schooled Children” as well. We offered to put Kids out and about in Sam Patch’s Newsletter and they offered to give us a heavily traveled spot on their site. Eric and I will put together a day at the end of June (for teachers launching their summer or Teachers Conference) to come and see what Sam Patch has to offer. This will be presented as a Kids Out and About Event! I need to research the “Lead Teachers” in the school districts to locate the Social Studies and Science teachers to invite them to the convention aboard the Sam Patch.

04/02/04 – Meet with Eric to review Financials and reviewed our success filled opportunities. 1.) Easter Bunny Arrival exposure in Marketplace Mall. 2.) Increased awareness once on KidsOutandAbout.com site. 3.) Getting recognition in the new book being published by Jackie Perrin and Debra Ross. 4.) Raffle on Kids site a family package aboard Sam Patch. Exposure to the site is high- 90,000 hits a season. 5.) Sending out invitations to 3rd, 4th, 5th and 6th grade Teachers to experience first hand what the Sam Patch can offer their students as well as their own families. 6.) Looking for Sponsors. Suggested _Paul’s Teacher’s Pet – Jefferson Rd. Teachers shop there so it would be a good idea if they came on the boat and gave their message right before we took off on the Sam Patch at the Teachers Convention. 7.) We need to ask the Museum if they would be willing to give Amos Eaton, the famous character that does the theatrical event aboard the Sam Patch to join them for the Teachers Convention in June. Give the Teachers an insight to the learning experiences offered and understand their students can get credit for these programs or classes.
04/04/04 – Researched sites to gain information on Teachers in the Rochester School District and the Monroe County District. Eric and I decided to target only the 3rd, 4th, 5th and 6th grade teachers in Science and Social Studies only. This research will consist of getting names and addresses for the target market. This information is to allow us to invite the right teachers for the Teachers Convention aboard the Sam Patch.

04/05/04 – Researched Social Studies and Science teachers in Monroe County so far I have been successful in finding the teachers for Penfield, Pittsford and Rochester and Rush-Henrietta.

04/06/04 - Researched Social Studies and Science teachers (or Super Independents of Instruction) in Monroe County so far I have been successful in finding the teachers for Webster, Fairport and East Rochester.

04/07/04 - Researched Social Studies and Science teachers in Monroe County so far I have been successful in finding the teachers for Brighton, Boces#1 and Boces#2.

04/08/04 – Compiled all information to review with Eric. Some research was difficult to locate. Some had to be written requests for information. Will compile the rest when received.

04/08/04 – Spoke with Kara Selke about the results of the Easter Bunny Arrival in Marketplace Mall. She felt that more flyers were picked up than she had even anticipated. We also looked afterwards to see if they were in the garbage or on the floors. It was clear that people were actually taking them to their cars and potentially home to review the information.
04/08/04 - Set up meeting with Kara to get the statistics on the outcome of the Easter Bunny Arrival. Will take her to dinner next week to thank her and get outcome information from her.

04/09/04 – Eric and I met earlier in the week to discuss opportunity at RMSC. Eric likes the Flyers so much, he asked for me to get 500 more to give to the RMSC. Will meet him at 4:30 in Pittsford to review flyers and the contacts I researched all week.

04/09/04 – Ordered Microsoft Publisher so I can assist Eric in creating and viewing Brochures. The new brochure is for the educational programs only. Traditional brochures used today have to much information from public tours, chartered tours and educational tours. The new brochure is definitely better when mailing to 3rd, 4th, 5th and 6th grade teachers or superintendents of school districts. The information is more tailored for their purpose of education, not the leisurely boat tours.

04/10/04 – Get my Flyers to RMSC. They need them to be ready buy Monday morning.

04/11/04 – Collected all reviewed information between Eric and myself. Changes need to be updated to the Marketing Plan.

04/12/04 – Updating changes to plan and strategy. Eric is out of town until 04/18. Will get mailing information completed this week.

04/13/04 – Microsoft Publisher 2003 came in the mail today!!!! Loaded it on my computer to start the new brochures! Will need to have a draft for when Eric returns from his vacation (04/19/04).

04/13/04 – Gathering pictures for the new brochures

04/14/04 – Combining info from Eric into brochure

04/15/04 – Left message for Kara to make sure we are on for dinner.
04/15/04 – Dinner with Kara Selke. Will obtain information regarding the Easter Bunny Arrival at Marketplace Mall.

04/19/04 – Sent e-mail to Debra Ross to check status on time frame for the Sam Patch Raffle to open on the KidsOutandAbout.com - Does she require additional information? Sent copy to Eric as well.

04/20/04 – Called Eric for meeting to review brochure and go through all the school teachers and their addresses (for the Rochester area) so we can get our mailing out on time.

04/21/04 – Met with Eric. Reviewed how to send mailings to. Will need to get them all into an excel spreadsheet so we can do the mailings, invitations and Eric will have a record of what he sends out as well as labels for future mailings.

04/27/04 – Received an e-mail (finally) from Alicia Velasco Director of Programs and Adult Development for the Girl Scouts of Genesee Valley, Inc. Sent an e-mail out ages ago and thought that the Girl Scouts were just not going reply. However, Alicia is very interested in talking about the Sam Patch programs. She feels this is a wonderful opportunity for the girls. I have asked her to call me after she comes back to the office on May 6th. I will set a meeting up so she can meet Eric.

04/28/04 – Get mailing addresses (from research done by district) in Label format in Microsoft Word. These labels will be used to send invitations and future mailings.

04/29/04 – Left message for Eric. Need to get together to do invitations for Teachers Conference for June celebration.

04/30/04 – Mailed “Thank you” notes to Jackie Perrin, Debra Ross, Kara Selke, Betty Barrett. Will send Eric’ O’Neils’s when finished with project. Would like to keep in
contact with him and assist in future execution of the strategy. Willing to stay on as a volunteer to Eric and the Foundation. Will discuss this with Eric at the appropriate time.

6.3 Marketing Organization

The marketing organization consists of the board members from the Navigation Foundation. The responsibilities are divided based on their own personally skills and abilities. There are monthly meetings to discuss open issues as well as any opportunities. The board members guide the organization to monitor and promote the progress of the financial development along with outstanding issues that require their attention.

Eric is solely responsible for not only managing the Sam Patch but also, to manage a verity of Sub-contracting, outsourcing and generation of volunteers. One association that has been useful to Eric and the Foundation is the Greater Rochester Visitor Association (GRVA). The association assists financially by paying membership fees and also by promoting all the Monroe County events with a specialty in advertising the Corn Hill Navigation Foundation.

6.4 Contingency Planning

The worst-case scenario that the Foundation must be prepared for is losing sales and funding that would result in not enough money to make the marketing budget. This would prompt liquidating assets to get the Foundation out of some debt. In order to assure that they continue their marketing programs, and a successful level of sales they must establish relationships with local community businesses. In exchange for advertising the Sam Patch and RMSC programs, these businesses would receive reduced rates on any of the tours available. This is possible in that
other companies have established the same type of relationships in this area and it has worked out well for them.

This "plan B" will at least allow the minimum planning without a heavy advertising cost for Foundation. This plan would assist in maintaining an acceptable level of sales until enough money can be generated to allow the Sam Patch to function. The planning will assist in opening additional marketing opportunities that will reduce the risk of the Foundation to fail and go under. The local communities are tight and have shown their support to one another with other community issues. This support would allow the other community businesses to promote and advertise the programs and tours with the least amount of “upfront” cost to the Sam Patch and the Foundation.
APPENDIX TWO

Easter Bunny
Event Flyer
Looking for things to do with the kids when it gets warmer outside?

Jump aboard the Sam Patch and discover your community through the experience of the Erie Canal!

Take your family or students on a voyage of discovery!

The Sam Patch Packet Boat and the Rochester Museum & Science Center are excellent ways to engage your children and yourselves in all that Rochester has to offer. Together they offer educational programs available to school or community groups.

**Waterways History & Ecology**  
Booking now 2004 season  
- Learn about the health and history of our local waterways. Cruises available all season long.

**The Amos Eaton School of Science on the Erie Canal**  
Booking now for Fall 2004  
- Join professor Amos Eaton as we recreate the voyage of discovery he undertook in 1826. Enjoy this museum theater experience with live actors and hands on experiments. Meets NYS learning standards.

**A River Runs Through Us!**  
Booking now for Spring 2004  
- Become a scientist for a day and experience the real world outdoor classroom of the Sam Patch, collecting water and sediment samples to analyze for oxygen content, pollution, acidity levels, algae, organisms and bottom quality.

Sam Patch also offers a variety of public and private cruises.  
- Enjoy a tranquil cruise  
- Join us for a lunch or dinner cruise  
- Celebrate your special occasion

To schedule a cruise contact the Sam Patch Packet Boat at 585-262-5661  
Contact the Rochester Museum & Science Center at 585-271-4552

Check us out on the web:  
[www.sampatch.org](http://www.sampatch.org)  
[www.rmsc.org](http://www.rmsc.org)
APPENDIX THREE

Easter Bunny Event Results
&
Demographic Reports
To: Kelley Berry  
From: Kara Selke, Marketing Director  
Date: April 28, 2004  
Re: Re-cap of Easter Bunny Event and Sam Patch Flyers

- Flyers given out to parents at the Easter Bunny Arrival Party and Easter Bunny photo set on March 27th and 28th
- Families that attended the event brought their children ages 6-months to 10 years old. Many of these families have additional children from the ages of 10 to 16.
- Flyers were placed on tables with store coupons and coloring sheets. Good news is no flyers were found in garbage cans or used as coloring sheets. Parents took flyers with coupons to mall stores.
- Research tells us that parents tend to take these items home and read and bring back coupons to shop in mall on another day without children.
- Approximately 250 children attended the Easter Bunny Arrival Party.
- Another 418 children visited the Bunny set during the weekend.

The following pages have general information on the mall trade area and customers.
### MarketPlace Mall

#### Primary Trade Area and MSA Demographic Report

<table>
<thead>
<tr>
<th>Population</th>
<th>Primary Trade Area</th>
<th>MSA: Rochester, NY</th>
<th>National Rank</th>
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<tbody>
<tr>
<td>2006 Population</td>
<td>674,342</td>
<td>1,115,554</td>
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<td>2003 Population</td>
<td>669,709</td>
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<td>2000 Population</td>
<td>666,398</td>
<td>1,098,203</td>
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<td>1990 Population</td>
<td>652,207</td>
<td>1,062,470</td>
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<tr>
<td>2003-2008 Population Growth</td>
<td>0.7%</td>
<td>0.9%</td>
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<td>2000-2003 Population Growth</td>
<td>0.5%</td>
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<td>1990-2000 Population Growth</td>
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<table>
<thead>
<tr>
<th>Households</th>
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<tr>
<td>2006 Households</td>
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<td>1990 Households</td>
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<td>2003-2008 Household Growth</td>
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<table>
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<tr>
<th>Income</th>
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<td>2006 Average Household Income</td>
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<td>2003 Average Household Income</td>
<td>$61,592</td>
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<tr>
<td>2003-2008 AHI Growth</td>
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<tr>
<td>2003 Per Capita Income</td>
<td>$24,712</td>
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<tr>
<td>2003 Median Household Income</td>
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<td>2003 Total Income ($000)</td>
<td>$16,348,489</td>
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<td>Households &gt; $75,000</td>
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<td>41,944</td>
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<td>13,853</td>
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<td>% Households &gt; $150,000</td>
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<td>Black</td>
<td>15.4%</td>
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<tr>
<td>Asian</td>
<td>2.2%</td>
<td>1.9%</td>
<td></td>
</tr>
<tr>
<td>Other</td>
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<td>4.6%</td>
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</tr>
<tr>
<td>Total</td>
<td>100%</td>
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| Latino / Hispanic Origin | 6.6% | 4.6% |          |

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<td>18 to 20 Years</td>
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<tr>
<td>21 to 24 Years</td>
<td>5.2%</td>
<td>5.2%</td>
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<tr>
<td>25 to 34 Years</td>
<td>12.3%</td>
<td>11.7%</td>
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<tr>
<td>35 to 44 Years</td>
<td>15.2%</td>
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<tr>
<td>45 to 64 Years</td>
<td>23.8%</td>
<td>23.8%</td>
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<td>65 Years and Over</td>
<td>6.8%</td>
<td>6.9%</td>
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<tr>
<td>65 to 64 Years</td>
<td>5.7%</td>
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<tr>
<td>Median Age</td>
<td>36.3</td>
<td>37.2</td>
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2014 Weirton Mark Research
**Heniectta, NY**

**Marketplace Mall**

**DRIVE TIME DEMOGRAPHIC REPORT**

**POPULATION**

<table>
<thead>
<tr>
<th></th>
<th>10 MINUTES</th>
<th>20 MINUTES</th>
<th>30 MINUTES</th>
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<tbody>
<tr>
<td>2008 POPULATION</td>
<td>235,552</td>
<td>682,428</td>
<td>836,252</td>
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<td>2003 POPULATION</td>
<td>237,327</td>
<td>676,681</td>
<td>825,842</td>
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<tr>
<td>2000 POPULATION</td>
<td>238,290</td>
<td>672,661</td>
<td>818,907</td>
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<td>1990 POPULATION</td>
<td>240,300</td>
<td>666,245</td>
<td>809,904</td>
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<td>2003-2008 POPULATION GROWTH</td>
<td>-0.7%</td>
<td>0.8%</td>
<td>1.3%</td>
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<tr>
<td>2000-2003 POPULATION GROWTH</td>
<td>-0.4%</td>
<td>0.6%</td>
<td>0.8%</td>
</tr>
<tr>
<td>1990-2000 POPULATION GROWTH</td>
<td>-0.8%</td>
<td>2.5%</td>
<td>3.7%</td>
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**HOUSEHOLDS**

<p>| | | | |</p>
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<tr>
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<tr>
<td>2008 HOUSEHOLDS</td>
<td>94,567</td>
<td>274,353</td>
<td>332,152</td>
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<td>2003 HOUSEHOLDS</td>
<td>94,130</td>
<td>268,382</td>
<td>323,197</td>
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<td>2000 HOUSEHOLDS</td>
<td>93,826</td>
<td>264,656</td>
<td>317,678</td>
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<td>1990 HOUSEHOLDS</td>
<td>93,383</td>
<td>253,182</td>
<td>299,150</td>
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<td>2003-2008 HOUSEHOLD GROWTH</td>
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<td>2.8%</td>
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**INCOME**

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<td>2008 AVERAGE HOUSEHOLD INCOME</td>
<td>$63,509</td>
<td>$69,245</td>
<td>$70,128</td>
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<td>11.2%</td>
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<td>2003 PER-CAPITA INCOME</td>
<td>$23,193</td>
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<td>2003 MEDIAN HOUSEHOLD INCOME</td>
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<td>2003 TOTAL INCOME (000)</td>
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<td>$16,713,462</td>
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<td>16.1%</td>
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**ETHNICITY**

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<tr>
<td>OTHER</td>
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**TOTAL**

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<tbody>
<tr>
<td>LATINO / HISPANIC ORIGIN</td>
<td>7.3%</td>
<td>5.9%</td>
<td>5.2%</td>
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**AGE**

<table>
<thead>
<tr>
<th></th>
<th>10 MINUTES</th>
<th>20 MINUTES</th>
<th>30 MINUTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>14 YEARS AND UNDER</td>
<td>19.8%</td>
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<td>20.7%</td>
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<tr>
<td>15 TO 17 YEARS</td>
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<td>4.4%</td>
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<tr>
<td>18 TO 20 YEARS</td>
<td>6.3%</td>
<td>4.5%</td>
<td>4.6%</td>
</tr>
<tr>
<td>21 TO 24 YEARS</td>
<td>7.1%</td>
<td>5.2%</td>
<td>5.2%</td>
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<tr>
<td>25 TO 34 YEARS</td>
<td>14.7%</td>
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<td>11.9%</td>
</tr>
<tr>
<td>35 TO 44 YEARS</td>
<td>14.2%</td>
<td>15.2%</td>
<td>15.5%</td>
</tr>
<tr>
<td>45 TO 49 YEARS</td>
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<td>7.7%</td>
</tr>
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<td>50 TO 54 YEARS</td>
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<td>6.8%</td>
<td>6.9%</td>
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<td>55 TO 59 YEARS</td>
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<td>5.8%</td>
</tr>
<tr>
<td>60 TO 64 YEARS</td>
<td>3.7%</td>
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<td>4.2%</td>
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<tr>
<td>65 YEARS AND OVER</td>
<td>12.3%</td>
<td>13.6%</td>
<td>13.0%</td>
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**MEDIAN AGE**

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<tbody>
<tr>
<td></td>
<td>33.7</td>
<td>37.0</td>
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</tbody>
</table>
APPENDIX FOUR

KidsOutandAbout.com
Web Site
List of top places to take your kids in the greater Rochester, NY area

To see this list with descriptions and links to reader comments, click here.

1. Strong Museum
2. Seneca Park Zoo
3. Seabreeze
4. Rochester Museum & Science Center
5. Lollypop Farm
6. Brown's Berry Patch
7. Seneca Lake State Park Sprayground
8. Six Flags Darien Lake
9. Springdale Farm
10. Genesee Country Village & Nature Center
11. Mendon Ponds Park
12. Erie Canal hiking
13. Rochester Red Wings baseball
14. Long Acre Farms
15. Ontario Beach Park
16. Rochester Children’s Theatre
17. Rochester Public Market
18. Perinton Park
19. Cumming Nature Center
20. Sam Patch boating on the Erie Canal
21. Local Library

Other great places to take your kids (alphabetical order)

Black Creek Park
Choo Choo's
Chuck E. Cheese
Durand Eastman Park
Eastview Mall
Geva Theatre
Hamlin Beach
Hochstein School of Music & Dance performances
Joseph Smith Farm/Hill Cumorah Festival
Kershaw Park, Canandaigua
Manhattan Square Ice Rink
Memorial Art Gallery
Powder Mills Park
Rochester Americans hockey
Rochester City Wrestling
Rochester Philharmonic Orchestra
Rochester Rhinos soccer
Rochester Recreation sprayground
Roseland Water Park
Sodus Point Beach
Rochester Community:
- 292-BABY
- Parent clubs
- Rochester Children's Theatre
- Natl Ctr Missing/Exploited Children
- Big Bros-Big Sis

Be a Corp. Sponsor!

General Info:
- Homepage
- About KOA
- Contact Us

Archives:
- Wkids Recipes
- Science Experiments

---

Sterling Renaissance Festival
Stokoe Farms
Tinker Nature Park
Webster Park
Willow Pond Aqua Farm
YMCA

And we couldn't find a web site link for...
Adventure Landing, 3340 West Ridge Road, Rochester, 585-225-5093
Movies 10, 2611 West Henrietta Road, Brighton, 292-5840
The Raffle for the Family Package aboard the Sam Patch will also be on this site at the end of May 2004.
APPENDIX FIVE

Invitation to
Teachers Conference
You are cordially invited to attend the

Sam Patch Teachers Conference

June 26th 2004

9am – 9:15am: Introductions, getting settled
9:15 am – 9:30: Sam Patch History
9:30am – 10am: Canal Ride
10am – 10:30am: Questions and Answers

Shoen Place, Pittsford – 755-0611
RSVP Requested by June 18th
APPENDIX SIX

New
Sam Patch
Brochure
Adventures in Education

Since 1991 we have shared the joys of the canal with over 18,000 school students. We have been active with schools involved in the Genesee River Valley project and in 1998 launched an educational partnership with the Rochester Museum & Science Center.

Our Foundation’s mission is to provide creative access to, and greater awareness of, our community’s historic waterways. With education as our primary focus, we offer a variety of informative programs and community events, to bring that mission to life. Bring your group to the waterfront and enjoy the memorable adventure as you share together in learning about the canal of yesterday and today.

RMSC
657 East Ave.
Rochester NY 14604

Sam Patch
12 Corn Hill Terrace, Suite 7
Rochester NY 14608

Sam Patch Pittsford: 12 Schoen Place, Pittsford, NY 14534

Sam Patch Dock Downtown
250 Exchange Street
Rochester NY 14608

The Corn Hill Waterfront & Navigation Foundation:
A not-for-profit organization formed to promote the upper Genesee River and the Erie Canal

Present: A revolution in education

Rochester's Authentic Canal Experience

(585) 262-5661
www.sampatch.org

(585) 697-1111
www.rmsc.org
A River Runs Through Us

An inquiry based, hands-on activity program that allows students to become scientists and analysts as they collect and gather data from the Genesee River and Erie Canal. Students experience the real world outdoor classroom of the Sam Patch, collecting water and sediment samples to analyze for oxygen content, pollution, acidity levels, algae, organisms, and bottom quality. Students rotate through and explore three onboard stations that include chemistry, biology, and the watershed lab.

Various experiments will be performed to determine what is actually in the water, why it is there, and its impact on the health of the rivers and the surrounding ecosystem. Through these activities, students will explore different career opportunities such as biologist, autographer, geologist, and chemist.

www.sampatch.org
www.mnak.org

Reliving History with Amos Eaton

Students are transported back to 1826, to an historical meeting with Professor Amos Eaton. They experience his voyage of discovery, when he and his students journeyed on the Erie Canal from Albany to Buffalo.

Through the total immersion of a museum theater piece, students become scientists. They learn about Professor Eaton’s life, demonstrating his “learn by doing” philosophy. They share his research and make discoveries about geology, plant identification, and the human impact created by the Canal.

Students travel inside a Canal lock, watching it being raised and lowered. Then they move on to one of engineering feats of the Erie Canal, The Great Embankment. During their travels, students record their observations in journals. They solve problems, identify plants and rocks, identify fossils, and study canal engineering and cartography.

www.sampatch.org
www.mnak.org

All In Our Backyard

We are fortunate to live in an area with so many waterways. Lake Ontario, Irondequoit Bay, the Genesee River and the Erie Canal. One doesn’t have to travel far to access one of these bodies of water.

Partners Sam Patch and the Rochester Museum & Science Center provide a unique adventure to explore the history and water quality of these local waterways. Jump aboard the Sam Patch! Discover your community by visiting these water resources.

www.sampatch.org
www.mnak.org

SAM PATCH STRATEGY
APPENDIX FIVE

References
& Resources
References:

Aronson, S.R. 1995 Alternative Learning Environments: (Insights on Education Policy, Practice, and Research, Number 6). Southwest Educational Development Laboratory, Texas

Iowa Association of Alternative Education 1990 Brochure available from Kathy Knudtson, 1212 7th St. S.E., Cedar Falls, IA 52401


Kershaw, C.A. & Blank, M.A. 1993 Student and education perceptions of the impact of an alternative school structure. Paper presented at the Annual Meeting of the American Research Association, Atlanta, GA.


Resources:

http://www.mcsba.org/districts.html - Monroe County School Board

http://fairport.org/ - Fairport Central School District

http://www.penfield.edu/dist_maps.asp - District Maps

http://www.penfield.edu/schools.asp - Penfield Central School District

http://pittsfordschools.org/schools.cfm - Pittsford Central Schools


http://rhnet.org/schools.cfm?menu=11&subpage=0 - Rush-Henrietta Schools

http://www.websterschools.org/aboutus.cfm - Webster Central School District


http://bcsd.org/index_flash.cfm - Brighton Central Schools

http://mcsba.org/districts/boces1.html - Board of Cooperative Education Services, Boces #1
http://mcsba.org/districts/boces2.html - Board of Cooperative Education Services, Boces #2
http://www.kidsoutandabout.com - Kids Out and About .com _relationships with Publisher (Debra Ross) and article writer (Jackie Perrin).
Http://www.SamPatch – The Corn Hill Waterfront & Navigation Foundation non-for profit organization formed to promote the Genesee River and the Erie Canal
Http://www.olc.org/marketing - using model – and Internet Marketing Dictionary
http://www.actionplan.com/6psmarkt.html - The 5Ps of Professional Service Business Marketing model
http://www.morebusiness.com/running_your_business/marketing/d1009169622.brc - How to make some noise about your business.
http://www.morebusiness.com/running_your_business/marketing/d989185088.brc - How to decide what you want from your marketing efforts before you spend the money to get it.
http://www.nybeacons.org/standards.html - New York State Learning Standards
http://marketing.about.com/cs/advertising/ - Advertising Strategies

http://marketing.about.com/cs/marketingplan/index.htm - About Marketing - Plans and Strategies & Advice

http://marketing.about.com/cs/nonprofitmrktg/ - Marketing for Non-for profit Organizations