



Heritage Consulting Inc.

Workshops and Consultations for Historic Sites

Our 2015 training series highlights the people that make historic sites great: Board, Staff and Volunteers. Listed here are more than 25 training topics and a list of a wide range of consultations we have undertaken over the last dozen years for start-up or seasoned historic house museums. These workshops were developed for historic sites based on our continuing research since the publication of *New Solutions for House Museums: Ensuring the Long Term Preservation of America's Historic Houses* by AltaMira Press in 2007. We can customize all of these workshops for your specific circumstances. We present our training workshops first, then our consultations.

BOARD AND STAFF TRAINING

Best Practices in Board Service for Historic Sites

Clear up the confusion about who does what in historic house museum organizations by hosting this session. We will first discuss the legal responsibilities of all nonprofit board members. Then we turn to what historic site Board members do collectively and as individual members to support the organization. During this 90-minute session you will learn about what Executive Directors do and don't do at historic sites and how to promote staff longevity. We will share some horror stories along the way about good boards gone bad, so that you won't make the same mistakes! Finally we discuss Core documents that all house museums need to be effective stewards of their collections and historic property. We'll distribute a resource packet with lots of blank forms, letters, articles, a bibliography and other information to help to boost your board's effectiveness. Beginner level.

We offer consultations on this topic; please see the section on consultations at the end of this document.

Better Recruitment = Better Boards

This workshop explains current nonprofit best practices for the Board Nominating Committee in historic sites and preservation organizations. Since the Nominating Committee is the only committee concerned about the organizations near term future, we will discuss who should serve on this committee, its work throughout the year, and how to organize for best results. We will use a mnemonic device PRONTO to organize this highly interactive presentation, and show how this committee should effectively identify, recruit, discuss obligations, nominate,

train and orient new board members for maximum benefit. This workshop is geared for growing organizations, ready to begin strategically adding new board members to prepare the organization to make an orderly transition toward the next phase of growth and development. This 90-minute workshop includes one group exercise and a CD full of documents and articles to use right away. Intermediate level.

Your New Board Policies Courtesy of the IRS

Recently the IRS completely redesigned the 990 form to collect much more information about nonprofit governance practices. Historic sites and preservation organizations need to understand these expansive and highly technical changes and to ensure the correct information is being submitted. During this 75-minute session, we will review the pertinent IRS 990 form questions and definitions. We'll also provide sample policies and documents so that you understand the IRS concerns and will be able to bring your organization into compliance. Beginner level.

We offer consultations on this topic; please see the section on consultations at the end of this document.

Strategic Planning for Historic House Museums

Creating a preferred future for your historic house museum is the goal of any quality Strategic Plan. This session is for organizations considering whether to engage in this process. This session will help your organization identify who should be part of their strategic planning process, why their involvement is essential to healthy growth and development, and how to use the strategic planning process to propel your historic site to the next level. We will discuss how to use SWOT and focus groups/surveys of stakeholders to inform your strategic planning process. We will discuss the typical parts of a strategic plan; how long your board should devote to its preparation, and how you should use the final document for public relations, fundraising, and business and volunteer recruitment purposes. This session is 75-minutes and we can supply samples of the research segments of the strategic plan for review. Intermediate level.

We can also facilitate strategic planning sessions, please see the section on consultations at the end of this document.

FUNDRAISING

Diversify Your Revenue Sources!

All historic sites need regular, predictable income to sustain their organizations and to ensure a viable future. This fast paced workshop which can be either 90 minutes or a half a day explains

the Board's role in fundraising and how they delegate responsibilities to committees and staff. We will discuss seven typical sources of revenue for historic sites with special emphasis on three sources of revenue where the site controls both the output and largely the outcome: membership campaigns, sponsorship and fundraising events. We will offer ideas about how to grow these three revenue sources so that they constitute a reliable portion of the annual operating budget. Finally we will briefly review other options for a sustainable organization such as planned giving and endowments. We wrap up top ten tips. Participants will receive an extensive resource packet of materials including the PowerPoint, articles and bibliography. Beginner level

Why Aren't You Asking for Year End Gifts?

According to Charity Navigator, your nonprofit organization could be raising up to 40% of its donations during the last six weeks of the year through an effective Year End Appeal. This workshop will give you all the tools you need to implement a year-end campaign using both social and traditional media to seek support for the general operations of your historic site. This fast-paced session will outline a simple ten-step process to implement a campaign starting in mid-November until December 31. We will discuss how to create a realistic goal, prepare your website for online donations, sort mailing lists, create compelling stories and letters/emails, reinforce the campaign with appropriate PR, schedule and automate thank you letter and being prepared for the last push between Christmas and New Year's Eve. This session can be a 90-minute overview or 3.5 hours in depth discussion. This workshop contains one or two small group exercises (depending on length of session) and participants will receive an extensive resource packet of materials including the PowerPoint, articles, calendar and bibliography. Intermediate/Advanced Level.

I Hate Fundraising! Removing Anxiety & Boosting Board Participation

This 90 minute course will help you respond to the age-old statement "I'll do anything, but just don't ask me to fundraise!" We will show you how even the most reluctant board (or committee) member can participate in the many tasks toward raising the necessary funds to operate your historic site. We will conduct a mock 20 minute training session that you can replicate at home, about many tasks needed to raise funds. The trick is showing board members that fundraising is not only about making the ASK. Everyone can do his or her small part. In addition, by asking Board and committee members to undertake tasks they will actually carry out, you will get greater participation (and less anxiety) from all involved. Based on the work of Hildy Gottlieb (<http://www.hildygottlieb.org>) this workshop shows you how you can turn even the most reluctant board member into an enthusiastic worker for fundraising efforts. We will supply a nifty template to use for your training session at home. Advanced level

The Ask: Getting Your Board Comfortable with Fundraising

Mounting a capital campaign to raise large sums to save or restore an historic building in town is hard work over many years for any local preservation organization. In this 3.5 hour session you will be introduced to the components of a capital campaign: donor cultivation, the ASK, and stewardship of the donor. We will talk about developing prospect files and the information you will need in those files. You will learn about the five different parts of the Ask, which is the “in person” approach to a potential donor to support your project. We will conclude with a short group exercise: a piece of improvisational theater to show you how to do the different parts of the ASK. This workshop includes two group exercises and a 40 page resource packet of articles, sample files and a bibliography provided on CD. Advanced level.

Creating a Fundraising Plan

As historic sites mature, and committees seek ever-greater revenue sources to support their activities, Board members are insisting on clear, measurable fundraising plans as a means to monitor fundraising across the whole organization. This hour and a half long workshop will introduce you to the component parts of a fundraising plan and how it is integrated into the work planning process. Participants will receive a resource packet of materials including the PowerPoint presentation, several articles, template, sample fundraising calendar and bibliography on CD. Intermediate/Advanced level.

Make More Money from Members

For most historic sites, membership or Annual Gifts are the first form of fundraising undertaken. But for most sites, it remains an undeveloped and unexploited revenue source. This session invites the audience to look carefully at their annual gifts renewal process to maximize revenue from this already committed group of supporters. For those with an admittedly weak annual giving program, we will discuss a model annual gifts campaign to boost revenue and number of donors. For those with an existing membership program, we will highlight seven easy ways to make more money from existing members during the renewal process. Finally the session will focus on revising your membership dues levels and creating giving clubs for donors at higher level to build loyalty and regular support. This session contains one exercise and participants will receive a resource packet of materials including the PowerPoint, articles, renewal calendar and bibliography. Beginner level

Year-Long Sponsorship Packages

Learn why you should gather all of your sponsorship opportunities into one package to solicit sponsors on a yearly basis, rather than one at a time. We will review three examples of year-long sponsorship packages and explain how this simple marketing effort can help you diversify your sponsorship base, gain more revenue from existing sponsors by offering more opportunities, and allow you to fine tune your sponsorship benefits across all events and programs your organization promotes throughout the year. This 90 minute workshop includes

one group exercise and a 40 page resource packet of articles, three sample sponsorship packages and a bibliography provided on CD. Intermediate level.

VOLUNTEERS

Alternatives to Volunteers: Interns, Community Service, Co-ops and Classes.

Since Ann Pamela Cunningham saved Mt. Vernon for the nation, volunteers have been the bedrock of the preservation movement. It is well known that the volunteer pool has fundamentally changed nationwide. Today's volunteers are unlikely to commit to long-term projects and seem to prefer "bite sized" or "done in a day" tasks. Given this dilemma, many historic sites have begun to use alternatives to volunteers to implement traditional activities and events. We will discuss the pros, cons, costs, and tasks best suited for the following eight volunteer alternatives: paid or unpaid college/graduate school interns; college work study students; college co-op study programs; individuals required to perform community service under judicial order; high school clubs or teams; Eagle Scouts or Girl Scouts; high school community service requirements, and college and graduate school class projects. Finally, we will focus on the ever more pressing need for job descriptions, high quality supervision, likely contacts, feedback, and timing to use these potential workers at your site or preservation organization. This 90-minute session includes one short group exercise, articles, and a template for creating job descriptions. Beginner level.

Three "R's": Recruit, Retain & Recognize Volunteers

In this workshop learn about how to plan your historic site work is using volunteers. Participants will learn how to create and sustain a strong volunteer corps to manage their programs. We will discuss why people volunteer, and the three basic recruitment techniques being used across the country at historic house museums. We'll discuss job descriptions for volunteer activities. Next we will focus on training techniques to assure that you retain your volunteers. Finally, we will talk about the most neglected part of the three Volunteer "R's" — Recognition — including why you must thank volunteers, three times, three ways. We will do group activities to brainstorm ideas about how to implement aspects of a vibrant volunteer program for your site. We will collect the results from these exercises and send the aggregated responses to participants. You will also receive a large packet of material with articles, forms, and checklists that you can use right away to build your volunteer corps. Beginner level.

We offer consultations on this topic; please see the section on consultations at the end of this document.

21st Century Volunteer Recruitment

There are so many ways to recruit both live and virtual volunteers to help with your historic site. In this 75-minute workshop you will learn about some new tools for recruitment, and why

job or task descriptions are still critical to attract skilled volunteers to your site. We will do two exercises about how to recruit live as well as virtual volunteers. This workshop includes a CD with the presentation, templates, letters, and articles to use to develop your on-line volunteer recruitment effort. Intermediate level.

New Trends in Volunteer Recruitment

This workshop is designed to acquaint you with episodic volunteers, short-term helpers who want specific tasks that are easy to do and complete in short work. We will explain the new role of your committee chairs, and how common job descriptions will help get these new volunteers to give their time again if their experience is pleasant and worthwhile. This is a 75-minute training program. We do one short exercise and provide plenty of handout materials to take home. Beginner level.

PUBLIC RELATIONS AND COMMUNICATIONS

Your PR Plan

Every historic site and preservation organization needs to build a positive public image through good public relations (PR). Learn how to shift from haphazard PR efforts to a strategy that puts the organization in a positive public spotlight. This interactive session covers the benefits of positive public relations efforts, effective PR methods and tools, and public relations strategy development. We'll review how to use media lists, social networking sites, press releases, interviews, press conferences, and other tools to steer the news your way. Learn how historic sites are using blogs, web sites, and social media to bring attention to their programs and touch younger people. Participants leave the 90-minute workshop with a "quick-and-dirty" PR plan to use immediately. Intermediate level.

We offer consultations on this topic; please see the section on consultations at the end of this document.

Overview of New and Traditional Media for Historic Sites and Preservation Organizations

This is a review of the many types of public relations and advertising that historic sites and preservation organizations do in the course of a year. We will discuss the use of the hottest new tools for communicating about your site or organization including Facebook group pages, Twitter, Instagram, Pinterest, blogs, e-newsletters, Apps (applications) for tours. We will talk about gathering databases, media lists, traditional mailing lists, email lists, twitter handles, and phone numbers for text messages. We will not neglect traditional media, especially annual reports, newsletters, newspaper articles, advertising and promotions on radio, TV, and travel magazines. This session can be 90-minutes or three hours depending on your needs. We provide a CD full of articles, clippings, samples and exercises to assure that local programs understand the variety of communication options available. Beginner level.

An Ideal Historic Site Web Site

We designed this workshop for historic sites and preservation organization that already have a web site, but believe improvements are necessary to communicate to stakeholders and visitors. In our consulting we have seen hundreds of house museum and preservation organization web sites and have screen shots from organizations, large and small. This workshop also stresses organizational transparency as a result of new requirements from the IRS 990 informational tax return requirements. We will discuss what kinds of content you should have on your web site to meet these requirements. This 75-minute workshop is not a primer in HTML or Content Management systems. Rather it an explanation of the content, pages, and navigation that are important for visitors and members. At the end of the workshop you will be able to visit with your web designer to create a more effective website for your organization. Beginner level.

Assessments of Committee Work

Often these consultations occur to solve problems at the committee level. We gather materials in advance from staff about the current issue facing the local Main Street program. We meet with the committee responsible and with staff to assess needs and offer new ideas and samples from other organizations to help improve the performance of the local program. We share sample documents from other programs to help launch or improve current program efforts.

Consultations and Audits of Volunteer Programs

Volunteers are critical to the success of any local Main Street program. We help towns to identify whether their volunteer recruitment, retention, or recognition program meets their needs. We work with the local manager and committee members charged with this important function to review current practices. We offer observations and recommendations in a brief report following the consultation.

Fundraising Consultations and Audits of Current Activities

We visit with the local program, and review every aspect of their fundraising operations to offer suggestions for improvement. We review all relevant materials in advance including membership lists, event work plans, sponsorship sell sheets, and databases that track income. We provide a list of prioritized actions that will help make the largest improvement in the least amount of time (and effort) to advance the program's cash flow.

Consultations on Membership/Investor Programs

Membership/Investors or Annual Gifts are the lifeblood of any local Main Street program. Whether they are called members, donors, partners or supporters, these annual gifts are critical to creating regular predictable funding for downtown work. We work with local programs to identify how their retention efforts are doing, and how they can be improved so that past efforts to recruit members can continue to produce revenue for the organizations.

Board Consultations

Board Retreats

We design half or whole day visits to assist boards in understanding current conditions and reaching agreement on new directions or long-term goals. Advance work by the Board is necessary to organize a useful retreat. Heritage Consulting works closely with staff to craft an event that includes exercises or other small group projects during the event to make the retreat memorable and useful. We compile a written report following the retreat.

Board Effectiveness and Evaluations

Heritage Consulting has conducted these evaluations throughout our career in working with historic sites. We visit with the Board and Executive Committee to identify the specific issue(s) with which they are struggling. We identify the issue(s) and offer our observations and recommendations to improve performance. Many times the intervention revolves around poor policies or the need for training in roles and responsibilities to clear up misunderstandings. We will conduct Board training if needed. We compile a brief written report following the consultation.

Organizational Development and Transformations

Bylaw Review and Update

Heritage Consulting Inc. has written bylaws for countless organizations and trained board and staff about their importance. More recently, we have helped mature organizations to review and refashion their bylaws to accurately reflect current organizational practices. We often prepare new bylaws for adoption and conduct a training session with the board to explain the new version. A revised version of your bylaws will be provided for board adoption after our consultation.

Organizational Crisis and Intervention

Heritage Consulting Inc. has offered this service since we began working with historic sites. We have intervened in many different situations, since crisis can happen at any time. Crisis can be man-made or an act of God. But all crises have implications. Some of the issues we have

consulted on include: unexpected resignations of staff or board president; discovery of financial improprieties; threats of lawsuits against the organization; sudden reversals in funding or financial support from major supporters; inappropriate board member behavior; and fires, floods or other natural disasters. We visit your site and help you to sort through the problem, and identify next steps. We submit a short report with recommendations after the consultation.

Mission and Vision Statement Development or Review of Existing

It is important to create these basic documents at the start of nonprofit organization to give its leadership an idea of its immediate future goals. We work with Board members and staff to help them understand what these documents mean, and how they shape the future of the organization. Also, we are often called in to help organizations revise old mission or vision statements, because the organization has succeeded in its original goals and needs a more expansive vision. We work with staff to create a workshop and exercises that will be useful to chart a new future course. We submit a short report following the consultation.

IRS Nonprofit Tax Exempt Organization preparation for 501(c) (3) designation

We coach a local volunteer to prepare the IRS form 1023 for submission to gain the 501(c) (3) charitable status. We have also coached historic site and preservation organizations that are starting new or wish to change their charity designation from 501(c)(6) to the more preferable 501(c)(3). This is an extensive consultation that can last three or more months depending on the involvement of the organization's accountant, auditor, or treasurer. At the end of the consultation, the volunteer submits a high quality IRS 1023 application.

Personnel Evaluations or Assessments

Heritage Consulting Inc. has been called upon to help historic site to improve their performance. Often these consultations occur over time, allowing the staff time to complete a series of tasks that will help them expand their skills or make changes in current practices. Coaching is the best means of engaging the Executive Director or other staff, and we develop individual plans for each person. We produce a short report on goals and outcomes.

Organizational Assessments and Restructuring

An assessment is a one-day visit to a historic house museum to identify current needs or intervene in a controversy. In some cases, the organization decides to change from one organizational form to another to achieve its objectives. We have helped organizations move from totally volunteer operations to a part time staff. We have consulted on audience research, tourism development or mergers. These visits often conclude with a board meeting or other kind of public meeting to offer observations and recommendations for improvement. We deliver a written report following the visit.

Creation or Update of Strategic Plans

A Strategic Plan is an important document to chart the future of any nonprofit organization. A good quality document involves surveys, interviews, SWOT analysis, and small group exercises in advance of writing the plan itself. Ideally a Strategic Plan should include all of these elements and may take several visits and up to six months to complete. We can devise more compressed versions if budgets are limited. A written report results.

SWOT Analysis (Strengths, Weaknesses, Opportunities and Threats)

Whether used as part of a Strategic Planning exercise or for taking the temperature of community residents, SWOT is a feedback mechanism that can help you get information from your stakeholders FAST. SWOT is often an evening or weekend meeting of three hours where we work with the client to identify the information they wish to gather from the meeting. We use a small group process to assure that everyone is heard and that we collect all the intelligence from the participants at the SWOT to help you make decisions. Following the SWOT, we produce a report in the form of a memo with observations and recommendations. We also include the sorted notes from the SWOT meeting.

Organizational Policy Review and Update

Recent changes in the IRS Form 990 tax return have caused nonprofit organizations to review their internal policies. We work with organizations to help them understand what policies make sense for the size and history of their organization and how to put these in place. We suggest sample policies based on local needs and offer written samples for local adoption. We will present our recommendations in a brief report at the end of the consultation.

Audience Research

These projects involve identifying and learning about the audience for a local historic site. This work involves interviews and/or focus groups where we ask specific questions to each group to gather opinions across a broad group of people about an issue. We work closely with the house museum staff to identify the questions we'll ask. We follow up with a report identifying the key issues and recommendations.

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