



Heritage
Consulting Inc.

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2022 Workshops and Consultations for Historic Sites

Our 2022 training series highlights the people that make historic sites great: Board, Staff, and Volunteers! Listed here are more than 35 training topics and a wide range of consultations we have undertaken over the last 17 years for startup or seasoned historic house museums and public history organizations. These workshops were developed based on our research for the Second Edition (2020) of *New Solutions for House Museums: Ensuring the Long-Term Preservation of America's Historic Houses* by Rowman & Littlefield Publishers. We can customize these workshops for your specific circumstances. We present our training workshops list first, then our 100-word descriptions of each training or consultation.

BOARD TRAINING

- Best Practices in Board Service for Historic Sites
- Your Nominating Committee's Better Board Building Work Plan
- Your New Board Policies Courtesy of the IRS
- Getting Ready for Strategic Planning for Historic House Museums

FUNDRAISING

- Diversify Your Revenue Sources!
- NEW Turning Supporters into Donors
- I Hate Fundraising! Removing Anxiety & Boosting Board Participation
- The Ask: Getting Your Board Comfortable with Fundraising
- Creating a Fundraising Plan
- Make More Money from Members
- Year-Long Sponsorship Packages
- Why Aren't You Asking for Year-End Gifts?

VOLUNTEERS

- Alternatives to Volunteers: Interns, Community Service, Co-ops, and Graduate School Classes
- Three "R's": Recruit, Retain & Recognize Volunteers
- 21st Century Volunteer Recruitment
- Volunteer Job Descriptions Workshop

PUBLIC RELATIONS AND COMMUNICATIONS

- Your Communication Plan

CONSULTATIONS

- Assessments of Committee Work
- Organizational Assessments of Historic Sites
- Search Process for New Executive Director
- Consultations and Audits of Volunteer Programs
- Fundraising Consultations and Audits of Current Activities
- Consultations on Membership/Investor Programs

HERITAGE TOURISM DEVELOPMENT

- Consultations on Heritage Tourism Strategies

BOARD CONSULTATIONS

- Board Retreats
- Best Practices in Board Service for Historic Sites
- Board Effectiveness and Evaluations

ORGANIZATION DEVELOPMENT AND TRANSFORMATION

- Bylaw Review and Update
- Organizational Crisis and Intervention
- Mission and Vision Statement Development or Review of Existing
- IRS Nonprofit Tax-Exempt Organization Preparation for 501(c)(3) Designation
- Personnel Evaluations or Assessments
- Organizational Assessments and Restructuring
- Create or Update Strategic Plans
- SWOO Analysis Workshop (Strengths, Weaknesses, Opportunities, and Obstacles)
- Visioning and Goal Setting Workshops
- Organizational Policy Review and Update

BOARD 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 house museum. During this 90-minute session you will learn about what Executive Directors do and do not do at historic sites and how to promote staff longevity. We will share some horror stories along the way about good house museum boards gone bad, so that you will not 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 will distribute a resource packet with lots of blank forms, letters, articles, a bibliography, and other information to help boost your board's effectiveness. This training includes information from our chapter "The Essential Role of Boards in Reimagining Historic House Museums," a chapter in the 2019 book *Reimagining Historic House Museums: New Approaches and Proven Solutions*, edited by Kenneth Turino and Max Van Balgooy for Rowman & Littlefield, Publishers. Beginner level.

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

Your Nominating Committee's Better Board Building Work Plan

Learn about the board building cycle in this session and come away with a work plan and 10 sample documents to help you build a better board of directors for your history organization. This presentation will review your Nominating Committee's role to identify, vet, nominate, and train new board members so that they are productive and helpful from day one. During the session, we will discuss, describe, and provide the ten resource handouts and work plan that you can customize and use immediately. A well-briefed board member will be more likely to fully participate in the work of the organization immediately. We provide a CD of the ten handouts, which include checklists, policies, samples, and charts for your Nominating Committee to use right away. Beginner level.

Your New Board Policies Courtesy of the IRS

In 2015, the IRS completely redesigned the 990 forms to collect much more information about nonprofit governance practices. Historic sites and preservation organizations need to understand these expansive and highly technical changes 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 will 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.

Getting Ready for 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. We 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 SWOO (Strengths, Weaknesses, Opportunities and Obstacles) 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 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 that allow the site to control both the input and the outcome: membership campaigns, sponsorships, 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 with our top ten tips. Participants will receive an extensive resource packet of materials including the slide deck, articles, and bibliography. Beginner level.

NEW! Turning Supporters into Donors: Increasing Financial Sustainability

This session explains the new handbook we co-authored called "Turning Supporters into Donors." You will learn how to plan and implement a 12 step/12-week community-wide fundraising campaign that will convert casual supporters into ready donors. We will show you how to encourage your board and volunteers to ask residents, current members, social media fans and local businesses to financially support your historic site. While we emphasize one-on-one fundraising for current donors, members, and key supporters, we also show how you can solicit your social media fans, email, and mailing list people for support. This session can be 60 to 90 minutes depending on your needs. We will supply a PDF of the 65-page Handbook which contains 15 sample documents including fundraising letters, brochures, graphics, and thank you letters.

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 raising the necessary funds to operate your historic site. We will conduct a mock 20-minute training session about the many tasks needed to raise funds that you can replicate at your organization. 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 the tasks they will 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 to 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. 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 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 for 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 insist on clear, measurable plans 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 slide deck, template, sample fundraising calendar, several articles, and a bibliography on CD. Intermediate/Advanced level.

Make More Money from Members

For many historic sites, membership and annual gifts are the first forms of fundraising undertaken. But for most sites, they remain 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 the levels of your membership dues and creating “giving clubs” for donors at higher levels to build loyalty and regular support. This session contains one exercise and participants will receive a resource packet of materials including the slide deck, articles, renewal calendar, and bibliography. Beginner level.

Year-Long Sponsorship Packages

Learn why you should gather all 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 the 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.

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 lasting from 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 letters, and prepare for the last push between Christmas and New Year's Eve. This session can be a 90-minute overview or a 3.5-hour 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 slide deck, articles, calendar, and bibliography. Intermediate/Advanced level.

VOLUNTEERS

Alternatives to Volunteers: Interns, Community Service, Co-ops, and Graduate School 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 graduate school class projects. Finally, we will focus on the ever more pressing need for job descriptions and high-quality supervision, as well as 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 using volunteers. Participants will learn how to create and sustain a strong volunteer corps to manage their organization. We will discuss why people volunteer, and the three-basic recruitment techniques being used across the country at historic house museums. We will 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 and in three ways. We will do group brainstorming activities about how to cultivate 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 materials 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 about 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 slide deck, templates, letters, and articles to use to develop your online volunteer recruitment effort. Intermediate level.

Volunteer Job Descriptions Workshop

Your volunteer recruitment efforts will be more productive if you offer short, written volunteer job descriptions and post them on a variety of social media outlets. This two-hour workshop helps you create high quality volunteer job descriptions to better recruit workers to implement projects. The bulk of this workshop is a hands-on exercise to create three types of job descriptions for volunteers based on current work plan projects. At the end of the workshop, we collect all the job descriptions that workshop participants create so they can be scanned and circulated as a library of job descriptions to use in the future. We will also discuss how to market your volunteer job opportunities, and how to integrate new volunteers at your site to work immediately. We provide a CD with the presentation, sample job descriptions, checklists, templates, articles, and a host of other useful volunteer recruitment-related materials. Beginner level.

PUBLIC RELATIONS AND COMMUNICATIONS

Your Communication Plan

Every historic site and preservation organization needs to build a positive public image through good public relations, organized in a quality communication plan. Learn how to shift from haphazard communication 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 communication strategy development. We will 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, websites, and social media to bring attention to their organizations and reach younger people. Participants leave the 90-minute workshop with a “quick-and-dirty” communication plan to use immediately. Intermediate level.

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

Consultations

Assessments of Committee Work

Often these consultations occur to solve problems at the committee level of a history organization. We gather materials in advance from staff about the current issues facing their organization and meet with them and the committee responsible to assess needs and offer new ideas and helpful samples from other organizations to improve the performance of the organization. We share sample documents from similar organizations to help launch or improve current program efforts.

Consultations and Audits of Volunteer Programs

Volunteers are critical to the success of any history organization. We help organizations to identify whether their volunteer recruitment, retention, and/or recognition program meets their needs. We work with the staff 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 public history organizations 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 organization's cash flow.

Consultations on Membership/Investor Programs

Membership/Investors or annual gifts are the lifeblood of any historic site or history organization. Whether they are called members, donors, partners, or supporters, these annual gifts are critical to creating regular operating funding for work. We work with board and staff to identify how their member retention efforts are doing, and how they can be improved so that past efforts to recruit members can continue to produce increasing revenue for the organizations. We produce a short report at the end of the consultation with our recommendations.

Heritage Tourism Development and Planning

Consultations on Creating Heritage Tourism Strategies

If you are hoping to create a new high-quality heritage tourism strategy for your area, this consultation will show you how to cultivate and develop new partners, especially heritage attractions nearby, to augment and highlight your own site, and to create a group of committed organizations willing to work to promote the area together. We will help you to create a logical tour loop to bring more visitors to your site and therefore more economic activity into your area. We will also discuss strategies to add content to your tour loop by including historic sites not open regular hours by encouraging them to further develop their interpretive materials for visitors.

This workshop will also touch on the value of creating an area visitor center if you do not already have one in town by asking for help from your area destination management organization. We will discuss the component

parts you will need to jointly promote your tour loop by adding downloadable tour loop guides and other plaques, interpretive and directional signs, and tour maps to assure that visitors want to visit other sites on the tour loop.

We will offer tips about working with your state and regional tourism partners to integrate your new tour loop into the larger tourism context. You will leave with a sample work plan and a checklist of tools such as using cross promotions, updating your website, using TripAdvisor and Yelp to create a buzz about your tour loop, creating quarterly joint e-newsletters to promote seasonal events, and publishing printed collateral materials that you and your partners will need to make the tour loop a quality visitor experience. We will provide these handouts on a CD after the consultation along with a brief report with our recommendations.

Board Consultations

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 do not 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 will not 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 will distribute a resource packet with lots of blank forms, letters, articles, a bibliography, and other information to help boost your board's effectiveness. This training includes information we provided for "The Essential Role of Boards in Reimagining Historic House Museums," a chapter in the book *Reimagining the Historic House Museum: Catalysts for Change*, edited by Kenneth Turino and Max Van Balgooy for Rowman and Littlefield Publishers in 2018. Beginner level.

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.

Board Retreats

We design half or whole day visits to assist boards to understand their current conditions and reach an 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 board leadership and staff to craft an event that includes exercises or other small group activities to make the retreat memorable and useful. We compile a written report following the retreat.

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 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.

NEW! Search Process for New Executive Director

Heritage Consulting Inc. has been highly involved in helping historic sites hire the best person available since we began our preservation work 25 years ago. Today we offer one on one assistance over three to four months to create a new job description, create a search committee of board volunteers, advertise the job opportunity, sort resumes/packages, identify top candidates to interview, host interviews, create questions to answer, advise on reference checks, provide sample offer letters, and offer suggestions for welcome packet and receptions and offer a list of tasks for the first 90 day on the job.

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 a crisis can happen at any time. A 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 or granting agencies, inappropriate board member behavior, fires, floods, and 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 a nonprofit organization's life to give its leadership immediate tasks and 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. We are also 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 long form 1023 for submission to gain the 501(c)(3) charitable status for organizations expecting more than \$50,000 in revenues in the next three years. We have also helped nonprofits file the 503(c)(3) EZ application for organizations that do not expect to have more than \$50,000

revenue in the next three years. We can coach historic sites and preservation organizations that are starting new or wish to change their charity designation from 501(c)(6) to the 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 or 503(c)(3) application via Pay.gov.

Personnel Evaluations or Assessments

Heritage Consulting Inc. has been called upon to help historic sites 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 multi-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, and organizational 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 brief written report following the visit.

Create or Update Strategic Plans

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

SWOO Analysis Workshop (Strengths, Weaknesses, Opportunities, and Obstacles)

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

Visioning and Goal Setting Workshops

Often used at the end of research for a new Strategic Plan, this workshop offers the most invested stakeholders the opportunity for small group work to identify the preferred future for the organization or historic site. Often, the mission statement is reviewed to see if it is still relevant given the organization's growth. Based on research about the audience, we identify a series of strategies and tasks/projects to further refine the organization's preferred future. This three-hour workshop is held in the evening or on a weekend to assure good attendance by key stakeholders. We produce a short report at the end of the consultation along with the raw notes from the small group workshops.

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.

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