

HSCRI Collaborative Brainstorm



Preserve Rhode Island Interns

Preserve Rhode Island Business Planning

Project for Historic Site Sustainability

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OVERVIEW

The purpose of this document is to list possible collaboration opportunities among the many historic sites around Rhode Island and the nonprofits that run them, as well as to further explore the feasibility of some of those opportunities.

In order to analyze the ideas listed below, a baseline set of assumptions was established. This collaboration document assumes that all new staff or additional responsibilities to existing staff positions will be hired and managed by the Historic Sites Coalition of Rhode Island (HSCRI). The HSCRI will act as an umbrella organization to participating historic sites.

It is necessary for HSCRI or some other, similar entity, to serve such a role so as to avoid the discussion of logistical and employment issues in the feasibility discussions below. Analyzing the following ideas based on their merits and potential benefits to Rhode Island's historic sites is more relevant to the end-goal of this project than weighing these ideas' feasibility based on the logistics of who, exactly, would employ and oversee these new staff positions. Sharing staff among multiple organizations presents a host of potential problems and having HSCRI act as an umbrella group to the state's historic sites eliminates those issues.

The final assumption is that historic sites would participate in the HSCRI in a more formalized way in order to reap the benefits of the resources proposed below. One possibility is for historic sites to pay to become HSCRI members and therefore benefit from the resources that umbrella organization has to offer. This would also help HSCRI offset the cost of hiring new staff.

MASTER LIST OF COLLABORATIVE POSSIBILITIES

According to Preserve Rhode Island Executive Director, Val Talmage, Rhode Island currently has 100 operating historic sites being managed by over 80 Steward Organizations. The following list represents resources and potential collaborations these historic sites and their associations can undertake on a statewide initiative to develop into more efficient and better managed museums. These suggestions are in no way exhaustive and it is highly recommended that further discussions and research continue into other ways historic sites can collaborate in order to be more effective to the audiences they serve. The first four recommendations are explored in further detail in the following sections.

- 1. Education Coordinator:** The State of Rhode Island recently implemented Curriculum Standards, referred to as Grade Span Expectations (GSEs), for Historical Perspective in grades K-12. An Education Coordinator will be a viable position for an umbrella organization such as HSCRI to employ in order to assist sites with local outreach into community schools; historical sites in Rhode Island can complement classroom learning with onsite field studies.
- 2. Packaged Gift Shop:** A statewide "gift shop in a box" helps museums of all sizes take advantage of professional expertise and bulk discounts to stock their gift shops. The logistics of contacting vendors, maintaining up-to-date inventory, and conducting on-site merchandising, computer, and sales training fall to the gift shop coordinator, who is a paid staff member of the HSCRI. Museums will order through the coordinator; an order will include an assortment of RI- and HSCRI-themed products, as well as those games, books, and other items that reinforce the museum's historical subject matter. This program will allow museums to professionalize and streamline their gift shops while still personalizing them with items unique to their theme and

collections. The gift shop in a box is an efficient and effective model to increase sales and support for RI's museums.

3. **Event Coordinator:** Many of the historic sites around the state of Rhode Island earn a portion of their income through the rental of the site for special events, particularly weddings. Often the pursuit of this revenue stream consumes a large proportion of time and resources. In organizations that rely on volunteer labor it is tempting to think that having a group of sites pitch in to fund the hiring of an Event Coordinator would be a productive use of resources. However, it is our conclusion that pursuit of this collaboration would create more problems than it would solve.
4. **Development Coordinator:** Fundraising is a major challenge for most nonprofit organizations, especially small, local institutions like historic sites. Many times these organizations are entirely, or nearly entirely volunteer-run and, while those volunteers possess a great deal of enthusiasm, fundraising expertise may be lacking. This is especially true in terms of what makes a well-executed and successful development effort. In order to be financially viable entities, historic sites must have robust and well developed development programs. However, they often must do this without the necessary know-how. Therefore, a full-time Development Coordinator position on the HSCRI staff who would serve as a consultant and resource to historic sites around the state is certainly worth exploring.
5. **Standard Template Packet:** Create a resource kit of standard documents each organization can use for their historic site. This will assist in streamlining documentation across the state and give a common form outline for easy recognition and use across multiple facilities. Some key examples include: press kit for press releases, collections management policies (including an acquisition policy), disaster planning, maintenance schedules, and evaluation templates.
6. **Shared Benefits Plan:** For those sites with paid staff, a statewide group benefit policy for lower cost healthcare can be initiated through an umbrella company. This will reduce premiums and assist historic sites in taking advantage of the concept that there is "power in numbers."
7. **Master Statewide Calendar:** All of the sites who become members of the umbrella organization will have the capability of entering their event programming on a master statewide calendar of events. The benefits will be twofold; the calendar will be published to the general public via online resources and links and programming can be planned on days with minimal activities at other sites to ensure the largest possible audience at any given museum. This fosters a sense of community versus competition.
8. **Docent Network:** With so many sites in the State of Rhode Island, a statewide docent network will allow people to connect and share experiences they had at their particular museum. Information sharing generates enthusiasm for the work being done and allows docents to try new tactics in their own work. Often, common challenges will surface that others may have a solution for. The docent network can serve as a professional development organization with paid membership and a distinct set of benefits.
9. **HSCRI Professional Membership Umbrella:** With so many professional organizations currently available to historic sites (i.e. American Association of Museums, American Association for State & Local History, National Trust for Historic Preservation, New England Museum Association), an umbrella organization that can provide access to the benefits these memberships provide will be beneficial. It can be cost prohibitive for sites to belong to all of these organizations; however, the services HSCRI can offer will be relevant to the work being done specifically at Rhode Island sites.

- 10. HSCRI Development Forums:** The umbrella group should act as a professional membership organization to historic sites in Rhode Island. As such, conferences should be developed that are specific to the needs of Rhode Island sites. Forums can cover topics such as new legislation that affects historic house museums, available funding for historic preservation, new education standards, Rhode Island tourist trends, and other pertinent state-related topics.
- 11. Mergers & Acquisitions:** In the face of a proliferation of nonprofits in the state, the merger of sites on a regional basis will allow for one oversight Board with several functioning committees underneath. This will create regional organizations that own multiple properties. The opportunity for larger programming, event rentals, increased visibility to tourists, ability to attract school groups, and streamlining of open hours and admissions can make historic sites less insulated from one another and create a new standard for proper stewardship of historic sites. A key model of this on a broader scale is Historic New England.
- 12. Crossroads:** As resources become increasingly scarce, responsible stewards of historic sites must carefully evaluate the best way to ensure the sustainable preservation of the buildings and grounds they manage. Often the best way to preserve historical treasures is not the creation of another historic house museum in a state already flooded with them. There are many uses to which historic buildings can be put that will ensure public access and historic preservation, including bed and breakfasts, libraries and galleries, community centers, and revolving funds for private residential ownership. HSCRI should consider the formation of a group to assist those sites that operate on the margins in identifying the most appropriate alternative use for each site; in doing so, the organization managing the building will see the process as a positive assurance of proper stewardship versus a failure of the managing group.

EDUCATION COORDINATOR

Historically, Rhode Island has suffered from inconsistent school curriculum standards statewide. What one town elementary school may be focusing on was not consistent with other local and regional school districts. These conflicting teaching standards made it difficult for historic sites to create collaborations with local school districts to use their sites as a resource. The State of Rhode Island has implemented the Rhode Island Statewide Curriculum (RISWC) for teachers to use as the basis of their lesson plans for grades K-12 and recently added a Historical Perspectives standard in 2006. According to the state, "If all students are going to achieve high standards, the district needs to have commonly agreed upon set of content and performance standards. That way, everyone - administrators, teachers, students, parents, and the community - knows what he or she is aiming for."¹ The recent addition of a history standard gives historical sites in Rhode Island a key opportunity to increase their visibility and ensure long term viability.

With these standards in place, historic sites will be well positioned to offer their facilities for onsite learning to local schools. The primary target audience of most historic sites today is the local community they reside within. One of the key ways to reach this audience can be through the local school system. By gaining visibility through the children, teachers, parents, and town administrators, historic sites become endeared to the community as a local resource worth supporting and sustaining. In addition, the sites benefit by reaching the next generation of potential preservationists and can instill the mindset that local history is worth saving.

¹ http://www.ride.ri.gov/instruction/stand_frameworks_default.aspx. Last accessed July 23, 2009.

In order for the historic sites in Rhode Island to create an active education component to their programming, they will need to understand how their site can provide the needed resources for local school teachers and their lesson plans. Since the curriculum standards are statewide, an Education Coordinator can work closely with the historic sites to see how their particular history can fulfill certain aspects of the state expectations. The Education Coordinator will have a close working relationship with the Rhode Island Department of Education (RIDE) to become a resident expert on the Grade Level Expectations (GLEs) and the Grade Span Expectations (GSEs) for the various grade levels. It is highly recommended that this position be filled by a former teacher or person with a strong public education background. It will be essential that this person can travel around the state on an as-needed basis to meet with historic sites and be an active participant in any initial meetings between the museum and the local school district. This position can start on a part-time basis and be re-evaluated after a set amount of time to determine if a full-time position is feasible. Key aspects of the job description will include:

- Develop and implement a basic education programming guide with steps to take to get started (instructional materials); assure compliance with statewide standards.
- Conduct individual assessments and collaborate with sites to develop and implement educational goals.
- Participate in regular meetings with HSCRI to update any new findings.
- Mandatory participation at all state education workshops and attendance at professional museum conferences on education programming.
- Build strong relationships within the state Education Department and create visibility for historic sites in Rhode Island as historical resources.
- Ensure sites focus on evaluation of all educational programming (pre-surveys and post-surveys) to make certain they are effectively reaching their target audience.
- Onsite classroom observation of the lessons and the use of kits.
- Host an annual statewide conference for historical sites to talk about new and innovative ways to reach local schools using the properties.
- Initiate an annual conference with state schools to present classroom program possibilities using local historic sites to teach larger historical themes; help to build relationships with school districts.
- Be knowledgeable about potential grant sources to refer the sites to for programming monies directed at education initiatives; promote collaborative grant writing between historic sites and schools.

The majority of historical sites will focus on the RI GSEs for Historical Perspectives. Most historical sites will choose one grade to focus on; this can be determined with the help of the coordinator based on what themes at the site best fit with a particular GLE. The historical perspectives standard covers the following:

Historical Perspectives Big Ideas/Statements of Enduring Knowledge & Stems
HP 1: History is an account of human activities that is interpretive in nature.
HP 1 –1: Students <i>act as historians</i> , using a variety of tools (e.g., artifacts and primary and secondary sources) by...
HP 1 –2: Students <i>act as historians</i> to interpret history as a series of connected events with multiple cause-effect relationships, by...

HP 2: History is a chronicle of human activities, diverse people, and the societies they form.

HP 2 –1: Students connect the past with the present by...

HP 2 –2: Students chronicle events and conditions by...

HP 2 –3: Students show understanding of change over time by...

HP 3: The study of history helps us understand the present and shape the future.

HP 3 –1: Students demonstrate an understanding of how the past frames the present by...

HP 3 – 2: Students make personal connections in an historical context (e.g., source-to-source, source-to-self, and source-to-world) by...

Standard educational programming should include the following elements:

1. Onsite field study at the historical site over the course of the academic year – ideally more than one visit;
2. Formation of classroom kits that include:
 - a. Audio visuals: DVD's, Audio CD's, or photographs of the site;
 - b. Hands on artifacts representative of similar collection items at the site;
 - c. "Field" Guides - Activities for school kids to do in the classroom (i.e., projects, research papers, preservation topics, dioramas of change over time);
 - d. Costumes for younger grades;
 - e. Books on the site.
3. End of year presentation event for the kids to exhibit any projects, papers, or activities related to the historical site and the lesson plans; attendees will include parents, local community, and school board members.

The Education Coordinator will be a resource local sites can access to assist in beginning education programming with their local schools. Instead of every site trying to organize how their programming can fit into the classroom, the coordinator can have a process already in place for initiating the conversation. With the addition of history expectations to the Rhode Island Curriculum Standards, historic sites are poised to become invaluable to local classrooms. For the long-term sustainability of every historic site in Rhode Island, having one point person who is knowledgeable about all aspects of state curriculum will prove priceless to helping historic sites cultivate their primary audience, the local community, and creating future stakeholders amongst the next generation.

GIFT SHOP

Optimizing gift shop operations on a statewide level is an easy way for Rhode Island's museums to increase revenue from sales, as well as standardize the quality of their products. Administered by the HSCRI, the "gift shop in a box" concept is a preset assortment of products distributed to museum stores. These are blended with items unique to each museum to stock the gift shop in a personalized manner. The unique items will still be managed and purchased by the sites. The gift shop in a box also includes procedural training for participating museums to improve the way they present and sell items in their stores.

Apart from the umbrella supervision of the HSCRI, the Gift Shop Coordinator, hired by the HSCRI on behalf of its member museums, monitors the program. Much like a merchandise buyer in the for-profit world, the coordinator's duties include traveling to tradeshows and selecting new products, communicating with suppliers and distributors, and keeping track of inventory. The coordinator also makes occasional site visits, evaluates and recommends best practices in sales and merchandising, and generally acts as a point person for the museums, vendors, and the HSCRI. Resources available through the Museum Store Association, a nonprofit that manages cultural commerce, help reinforce this model and offer distinct benefits to its institutional members. The MSA bases membership prices on volume of sales.² HSCRI is eligible to purchase a membership with the coordinator acting as a contact person for participating sites, which share in membership costs and benefits. These benefits include access to vendors, a subscription to *Museum Store* magazine, an annual conference, and industry-related articles and advice, and discounted credit card processing.³

Assorted products include HSCRI-themed tote bags, coffee mugs, umbrellas, and T-shirts, along the National Public Radio gift shop model.⁴ The gift shop coordinator can contract out the graphic design of a logo to create a visual identity for the HSCRI brand. Historical toys, games, and crafts cater to younger audiences while remaining consistent with museums' educational missions. Arcadia Publishing focuses on local history, particularly with its 'Images of America' series, making its books an excellent complement to educational programming.⁵ For gifts and tourist souvenirs, the coordinator can also order an assortment of uniquely Rhode Island products, such as locally made artworks, prepackaged food items, and books.⁶ When it comes time to actually stock individual gift shops, the museum places an order with the coordinator and selects a package size. For example, Package A has 10 books, 10 mugs, 10 key chains, 10 Del's Lemonade Mixes, and 10 Jacob's Ladder kits. Package B contains 25 of each, and Package C contains 50. Each set also includes labels and HSCRI signage for the store. This system takes the guesswork out of quantities. Museums avoid the hassle of dealing with vendors and wholesalers directly and receive the discounted bulk rates for their orders. The coordinator is responsible for receiving and distributing these orders to the museums, either by hiring a driver to personally deliver items, or by contracting shipping and distribution through a national provider, such as UPS or FedEx. Once the bricks-and-mortar model is a success, the Gift Shop Coordinator can explore the possibility of holding inventory for an online store, which all participating museums will link to from their websites.

The adoption of the gift shop in a box will bring about some fairly dramatic changes to participating museums. In terms of equipment, shops will shift to an electronic sales system and accept credit cards (either manually or through a card reader). A central computerized inventory will assist the coordinator in determining which products are a success and when to reorder. In terms of personnel, the Gift Shop Coordinator can ease the transition by providing staff training in Point of Sale systems and merchandising, to ensure that staff and volunteers are completely comfortable with general retail operations. Upfront costs involve the coordinator's salary and travel expenses, computers and networking (although new netbooks provide a less expensive alternative to traditional computers), printing and marketing for the HSCRI brand, and membership dues to the necessary professional organizations. However, the advantages to streamlining the ordering process far outweigh the initial expenditures of time and energy.

² <http://museumstoreassociation.org/membership/forms/MMapp.pdf>

³ <http://www.museumstoreassociation.org/membership/membership.cfm?type=members>

⁴ For NPR gear: http://shop.npr.org/catalog/NPR_Gear-33-1.html?mode=families

⁵ www.arcadiapublishing.com

⁶ The online gift store Only In Rhode Island displays some creative ideas: www.onlyinrhodeisland.com

A professional hand managing costs, communication, and inventory will relieve that burden from on-site museum staff and volunteers. A unified presentation of products will improve the public's perception of RI's museum stores and encourage them to shop where their dollars support local institutions.

EVENT COORDINATOR

One potential area of coordination that has been identified is the hiring of a central Event Coordinator. While this is an attractive prospect on the surface since many organizations rent their sites out for special events, the number of pitfalls and operational hurdles make this position infeasible.

There are two schools of thought as to the role an Event Coordinator would play.

1. Facilitate the bride's choice of venue within the state. Under this construct, the Event Coordinator would tour prospective clients around to various historic sites.
2. Traditional Event Coordinator – this person would function as the point person for the planning of events by assisting with everything from venue to décor to catering.

There are several reasons why either of these positions would not be an effective use of limited resources.

Logistics: The execution of the position a statewide or even regional event coordinator would be so complex as to make it infeasible. The number of brides wishing to tour many of the sites with robust venue programs can reach as high as ten on a Saturday making the giving of tours and responding to inquiries a fulltime position. The time it takes a traditional Event Coordinator to fully plan an event with the level of complexity of a wedding is 100 – 200 hours. Assuming a site can host 50 such events per year, the work load for one site's worth of full event coordination would be greater than three fulltime coordinators could accomplish. This does not take into account the coordination required the day of the event.

Fairness: With the amount of income many organizations generate from event rentals, especially weddings, relinquishing total control of this earned income stream represents a prohibitive risk to the financial sustainability of any organization. Additionally, the situation will certainly arise where one site receives a disproportionate share of the total business the Event Coordinator brings in. In these situations the question of equal effort comes into play.

Expertise: Each historic site deciding to enter the event venue arena is its own best advocate. They are the experts on what makes their site unique, what it has to offer, and what its capabilities are. Bringing in a third party to sell the use of the event space will dilute the sales pitch and the potential connections the site can forge with their customers.

An alternative to the hiring of an Event Coordinator is for HSCRI to host and maintain a website dedicated to historic site event venues. This website would be more than a listing of sites. It should allow the customer to filter the directory based on capacity, amenities, region, time period, etc. to make finding a list of venues that fit their needs simple. Once they have filtered the full directory, the customer should be presented with a short site description, photographs, and contact information. In terms of return on investment, this method of collaboration is a better choice.

DEVELOPMENT COORDINATOR

Development is such a critical component of any nonprofit organization that it must be addressed in regards to historic sites. As historic sites in Rhode Island are often run by small, localized, and often all-volunteer organizations, development expertise is often lacking. However, due to their unique sites and community ties, historic sites offer some great opportunities for successful and creative development efforts. “Development” is a broad term and, for purposes of this analysis, it is understood to mean income not from sources like grants, tours, or facility rentals, but from sources like membership, annual appeals, fundraisers and special events, and planned giving or major gifts. A Development Coordinator would be a significant asset not just to Rhode Island’s historic sites, but also to HSCRI.

A Development Coordinator, working for the HSCRI, would serve as a resource to participating historic sites around the state. This person would work in a consulting capacity. The Development Coordinator would help interested sites create from scratch or build stronger development plans and also assist sites in the execution of development efforts. This could range from assisting with the planning and execution of a special event or fundraiser on the site’s grounds, to working with the site’s development committee to create a plan for building a strong membership base, to advising on the timing and wording of annual appeal efforts.

Based on research done for this project, it is apparent that many historic sites are purchased and restored by a small group of dedicated local citizens. Once the site is in these citizens’ or their newly formed nonprofit’s hands, however, those same individuals seem unclear as to how to proceed and manage the site in a financially successful way. Essentially, the site is purchased and protected, and then no one knows what to do next. Due to this situation, many sites continue on razor thin margins from year to year, living from one grant to the next, and rely heavily on a base of dedicated volunteers who give up time, money, and other resources to keep the historic site in operation. Exactly how to build a committed membership base, how to generate significant responses from an annual appeal, or even what an annual appeal really is, are all frequently outside the realm of expertise of the site’s volunteers and Board of Directors. This is where a Development Coordinator on the staff of HSCRI would be very helpful.

While some historic sites have, or will grow to have, full-time professional staff, many will not. To expect a volunteer-run organization to have the same development expertise as a museum professional is unreasonable. So, providing such a resource through the HSCRI would be a great benefit to participating historic sites.

The key benefit of a full-time Development Coordinator is that this person can assist sites on a variety of levels with a variety of projects. A major hurdle to collaboration among Rhode Island’s historic sites is that they range dramatically in terms of size, budget, goals, awareness, resources available, community served, and many other factors. There are few commonalities from one site to another. For example, the difference in development needs from Linden Place in Bristol to Friends of Hearthside in Lincoln is stark. A Development Coordinator would be able to work with each individual site and address their specific needs and goals, rather than be a one-size-fits-all resource. This consulting-style approach to assisting historic sites in their move toward financial stability will meet the needs of the sites themselves, strengthen historic preservation efforts across the state, and allow the HSCRI to play a fundamental role in helping sites be more effectively managed.

Of course, there are drawbacks to creating a Development Coordinator position. Chief among those is the possibility that sites will not use the resource. However, the likelihood of this happening can be minimized by requiring sites to pay to be members of or participants in the HSCRI. With some resources dedicated to membership, the sites are more likely to use the tools the HSCRI offers.

A more likely drawback to hiring a full-time Development Coordinator is that there will be more demands on this person's time than can reasonably be met. According to Preserve Rhode Island, there are about 100 historic sites in Rhode Island and 80 nonprofit organizations managing those sites. If only half those sites became members of the HSCRI and use the Development Coordinator's expertise, it will result in 40 different projects and tailored development planning activities to be addressed by the Development Coordinator.

In order to mitigate the potential problem of overwhelming the Development Coordinator, a standard tool kit of information and best practices could be made available to the HSCRI's participating sites. This way, standard, basic information on how to create a development plan, or even what a development plan is and is not, could be sent to sites or downloaded from the HSCRI website. The Development Coordinator then would be able to focus on actual site-specific projects and efforts, rather than answering questions relating to development fundamentals. Even if a Development Coordinator position is not created and filled, such a toolkit of basic information would be exceptionally helpful to many of those running Rhode Island's historic sites.

Raising funds in an effective and efficient way from a variety of sources is a necessary part of being a financially viable nonprofit organization. Rhode Island's historic sites vary in their management's skill level, experience, knowledge, and available time and resources. Creating a full-time Development Coordinator to be hired and managed by the HSCRI would provide participating sites with a necessary and useful resource, as well as help educate all the state's sites as to development best practices and provide effective models around RI from which sites can learn. This collaboration idea should be explored further by the HSCRI.