



# MINNESOTA HISTORY Interpreter

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Carver County Historical Society



Carver County Historical Society volunteers work on newspaper indexing, one of four projects getting priority treatment under the organization's new strategic plan.

## With an eye on the future

### Strategic planning sets direction, orders priorities

Like many directors of small historical organizations, Leanne Brown felt fragmented. She and her board and staff at the Carver County Historical Society were good at generating ideas. But that was the trouble – they had too many good ideas. “Our plate was getting more and more full,” she recalled. “We were running in so many directions that we couldn’t get anything done.”

What they needed was a strategic plan, Brown decided – something bigger than their annual plan that would get them thinking beyond one year at a time. “We needed a three- or four-year scenario

to guide us in making the most of a new addition we had just built,” she said. So she read up on the subject, did some online research and talked to colleagues whose organizations had done strategic planning. What she learned helped shape the process the Carver County society used to develop its plan.

#### What is strategic planning?

Strategic planning is the process of determining what your organization wants to be in the future and deciding

## State funding cuts hit hard

### Grants-in-aid program reduced

The April 2003 Interpreter reported proposed reductions in the state appropriation to the Minnesota Historical Society under Gov. Tim Pawlenty’s plan to balance the state budget for fiscal year 2004–5. In late May the governor and legislature reached an agreement that reduced the Society’s funding even further, for a total loss each year of approximately \$4.3 million – a reduction of more than 16 percent.

This reduction will necessitate closing a number of historic sites, reducing services significantly and eliminating up to 30 percent of the Society’s staff – cuts that will severely hamper the Society’s ability to preserve the state’s history and offer a lively educational program. The disproportionate reduction in staff and public services is due to the Society’s significant fixed costs – including building services, caring for collections across the state and debt service.

“The Minnesota Historical Society must do its part to help during this difficult economic

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## Eye on the future *continued from page 1*

how to get there. It means defining (or refining) your mission and goals, identifying the programs and services you will offer to further your mission, and finding the resources – people, money and expertise – that you'll need to reach your goals.

"We created a planning process customized to our situation," says Brown, who used ideas from several sources to guide the CCHS board and staff through the strategic planning exercise.

### Why develop a strategic plan?

Clarifying future direction is just one of the reasons for undertaking strategic planning. The process of articulating a vision and setting goals can prove beneficial to any group that might be facing funding cuts or tackling an organizational problem or seeking to improve performance.

For Amy Biren, executive director of the Schroeder Area Historical Society, strategic planning provided an opportunity to build teamwork among members of a new board of directors. "We layered board development exercises on the planning process," says Biren. "The old board had identified some long-range goals for our Cross River Heritage Center. Now the new group is brainstorming steps for reaching those goals."

Sometimes the impetus for a strategic plan comes from outside the organization. That was the case in Roseau County after the 2002 floods, when the Roseau County Historical Society sought funding from the Northwest Minnesota Foundation's Roseau Area Community Fund. "They suggested we put together a strategic plan to help us identify our needs and chart our future direction," says RCHS curator Charleen Haugen. "We ended up using the flood as an opportunity to set some new goals. I think we'll come



At a recent retreat, Schroeder Area Historical Society board members brainstormed long-range plans for their Cross River Heritage Center (left), which houses a museum, gift shop and community center.

away from the process with a greater awareness of what we need to do to be a resource for the whole county."

### The planning process

Organizing a strategic planning process can be daunting. But experts agree on a few basic principles:

- Keep it simple.
- Involve organizational leaders.
- Use a process that fits your organization.
- Develop a flexible plan.

One of the first things you'll need to do is decide whether to tackle the process yourself or get help from a consultant. Both the Carver County and Schroeder Area Historical Societies chose to undertake their planning themselves. "It's more affordable that way," says Biren, "but it takes a lot longer. We gave ourselves a year to develop our plan. Meanwhile, I still have to tend to the day-to-day stuff like taking care of our building and running programs."

The Roseau County Historical Society chose a different route, hiring a consultant to lead them through the process. Linda Hamilton, the candidate selected by the board, had wide-ranging experience in a variety of historical organizations. "She started by sending questionnaires to the board and county commissioners, asking about their vision for the

historical society," explains Haugen.

"Then she spent three days at the museum interviewing the commissioners, area mayors and city council representatives, civic leaders and other influential residents." With future fundraising in mind, Haugen urged Hamilton to cast the net fairly widely. "We figured this would be an ideal time to get the community on board with our plan," says Haugen.

At a one-day retreat in June, the RCHS board and invited guests brainstormed directions for the museum. In July Hamilton returns for another one-day session to synthesize the results of the retreat and begin articulating a strategic plan.

### Gaining perspective

For the Carver County society's plan, Brown also used the retreat technique. She and her planning committee, made up of one-third of the board, began by taking stock of the organization. They reviewed their mission, analyzed the society's present programs and services, and applied the familiar SWOT formula, assessing organizational strengths and weaknesses, opportunities and threats. At subsequent meetings, the committee started generating ideas, identifying what they hoped to do in the years ahead. Once a month the committee reported their progress to the full board.

“Our planning group represented an eye-opening variety of perspectives,” says Brown. “What some members viewed as strengths, others thought of as weaknesses. And some members took a very practical approach, while others were more vision-oriented.” It was Brown’s job to strike a balance as she guided the group through the process. “There were some ideas I felt very strongly about,” she says, “but I had to be careful not to push my own opinions too hard.”

From a list of 21 projects identified as needs, the board eventually narrowed the field to four projects that will get priority treatment: newspaper indexing, creation of an oral history program, completion of several core exhibits and development of an education room for use by school groups.

**An important tool**

As both Haugen and Brown are learning, a strategic plan can serve as



Last year’s floods left the Roseau County Historical Society museum (left) and its exhibit galleries largely unscathed but prompted the organization to undertake strategic planning to identify its long-range needs.

an important communications and marketing tool with key constituents. “Because our museum is in a county-owned building, many of our projects need approval from Carver County commissioners,” Brown explains. “Complicating matters, the museum is

in a different town from the county government. So we use our long-range plan to educate the commissioners about our role – to remind them of our value to the whole community.

“It will also be useful for training new staff and for recruiting new board members who share our vision,” she adds. “We’ll use it for pursuing potential donors, too. In fact, it already helped us compete successfully for a state grant-in-aid from the Minnesota Historical Society. We got a small grant for one of our priority areas, an oral history project, during the winter 2003 grant round.”

Brown looks at the strategic plan as a work-in-progress. “We’ll review it periodically and modify it as necessary over time,” she says. “It’s not a static document that will sit on a shelf.” She sees it as a kind of checks-and-balances tool. “Now, when someone comes up with a new idea, we’ll be able to see whether it fits.”

*For more information about these strategic planning projects, call Leanne Brown, executive director of the Carver County Historical Society, 952-442-4234; Charleen Haugen, curator of the Roseau County Historical Society, 218-463-1918; and Amy Biren, executive director of the Schroeder Area Historical Society, 218-663-7706.*

## Five steps to develop a strategic plan

**Step 1: Get organized**

- Note reasons for planning and any concerns.
- Select a steering group or person to keep the planning on track.
- Determine if outside help is needed.
- Outline the planning process that fits your organization.
- Get commitment to proceed.

**Step 2: Take stock**

- Pull together necessary background information.
- Review your organization’s past, present and future situation.
- Identify key issues or choices.

**Step 3: Set direction**

- Develop a vision of your organization’s future.
- Determine how to move the organization toward this future.
- Develop a first draft of the plan.

**Step 4: Refine and adopt the plan**

- Review and refine the plan.
- Adopt the plan.

**Step 5: Implement the plan**

- Implement the plan.
- Monitor progress.
- Make adjustments.
- Periodically update the plan.

*From Strategic Planning Workbook by Bryan Barry. © 1997 Amherst H. Wilder Foundation. Used with permission. For more information on Wilder Foundation publications, call 1-800-274-6024.*

## Preserving a landscape legacy

Olmsted County Historical Society aims to restore Mayowood grounds

**T**erraced gardens. A teahouse. An island lagoon. “Dragon tooth” stone walls, statuary and arched bridges. With these features and more, Dr. Charles H. Mayo, cofounder of the famed Mayo Clinic, realized his vision for a country estate in the early years of the 20th century.

Between 1911 and 1939 on the banks of the Zumbro River near Rochester, Mayo created Mayowood, a grand house surrounded by elaborate landscaped grounds. In 1965 the family donated the estate to the Olmsted County Historical Society. Now, with a vision nearly as grand as Dr. Mayo’s, the county society plans to begin restoring the historic landscape.

### The country life

By the time he built his 30-room, Italian Villa–style house overlooking the Zumbro River, Charles Mayo was one of Rochester’s leading citizens. A renowned surgeon, Dr. Mayo had many interests – wildlife, agriculture, forestry, conservation – that came together in his sprawling estate. His holdings eventually grew to nearly 3,000 acres encompassing eight model farms and a greenhouse complex.

After consulting with a landscape designer for the estate’s initial plan, Dr. Mayo carried out its development. Over a period of 28 years he created an idyllic landscape of gardens, ponds and country lanes with the help of countless local laborers, carpenters, masons and gardeners. He even funded construction of a dam on the Zumbro River, forming a lake in front of the home with islands connected to shore by a suspension bridge.

Development of this magnificent estate coincided with the growth in the United States of the Country Life



Olmsted County Historical Society photos

Terraced gardens behind the main house at Mayowood, pictured here in 1914, featured a teahouse (left). In June the Rochester Garden Club and Rochester’s master gardeners held a garden tour fundraiser to benefit the renovation of Mayowood’s historic landscape.

Movement, dedicated to improving the rural landscape by embracing certain aesthetic and scientific farming principles. The grounds Mayo designed also reflected early 20th-century American interest in English, Italian and Japanese landscape design. A trip to Europe in 1923 by Mayo and his family resulted in the purchase of many of the estate’s marble statues, all copied from ancient works.

### A local landmark

Mayowood remained a focus of Mayo family life until the 1960s. After its donation to the Olmsted County Historical Society, the house was opened to the public. In 1970 the 14-acre Mayowood site was listed on the National Register of Historic Places. A 120-acre Mayowood

Historic District, encompassing the house and gardens, an adjacent lodge, the farms and a greenhouse complex, was created in 1981.

As any owner of a historic property knows, upkeep is a constant challenge, especially for a property as complex as Mayowood, with its varied topography, design treatments and periods of development. Despite the stewardship of the county historical society and its volunteers, the vast grounds were deteriorating with age and the effects of occasional storm and flood damage. Three years ago the OCHS board decided to explore the possibility of returning the estate to its former splendor. They formed a Mayowood Task Force composed of local professionals that would advise the society on what course to take.

## Developing a plan

The size of the project led the OCHS and its task force to seek outside advice. To develop a long-range plan for the complex, the society commissioned various studies including a historic structure report and a business plan. Most recently they engaged the St. Paul-based consulting firm of Landscape Research, which produced a comprehensive cultural landscape report that charted the historical evolution of the garden. Based on all the findings, the task force recommended that restoration of the nationally significant Mayowood Historic Landscape be a top priority for OCHS.

Landscape Research's report will serve as the foundation for a plan to reconstruct the grounds and interpret the site. Phase one is development of



A wrought iron arbor spans the concrete columns of a tempietto that once encircled a pond. This and other structures on the estate were inspired by the family's travels and current fashions in garden design.

a circulation plan. Currently underway are site clearing and an inventory of surviving features. Next will come restoration of the historic paths linking key garden sites (with ADA accessibility), masonry repairs on stairways and retaining walls, and

rehabilitation of the lawns and gardens.

An interpretive plan also is being prepared. Among the themes to be interpreted are the Zumbro River landscape, American estate design and the work of early 20th-century landscape architects, the Country Life Movement and the career of Dr. Charles H. Mayo. OCHS staff envision a system of self-guided interpretation, with displays containing maps, historic photographs and text to guide visitors through the grounds.

## Down the road

By 2005 the Olmsted County Historical Society hopes to have the grounds open for public tours. But the work of restoring, reconstructing and rehabilitating Dr. Charles H. Mayo's country estate will continue for years to come. Visitors to the site not only will learn about a significant local landmark but also will be able to follow the evolution of OCHS's ambitious project to preserve this historic landscape.

For more information on this undertaking, call OCHS executive director John Hunziker at 507-282-9447.



Mayowood's Island Lagoon, pictured ca. 1930, was formed when Dr. Mayo dammed the Zumbro River to flood the river flats. The water gardens he created were the most spectacular in Minnesota in their time. Here, a suspension bridge links one island to the shore.

## State grants-in-aid awarded

Competition high for limited funds in winter 2003 cycle

The Minnesota Historical Society's State Grants-in-Aid program was one of many state-supported programs affected by the state's revenue shortfall for the biennium ending June 30. The shortfall resulted in cancellation of last year's winter grant round and reduction of the pool of grant funds available for fiscal year 2003, covering the fall 2002 and winter 2003 cycles. That made competition particularly keen for the always sought-after grants.

In the 2003 winter cycle, 16 applicants received a total of \$42,989 in state grants-in-aid. Grants were awarded in the categories of historic properties, artifact collections, microform copies, oral history, photographic collections, museum environments and technology. This cycle saw emphasis by applicants on core activities such as building restoration and collections management.

**Carver County:** Carver County Historical Society, \$800, "Norwood Young America: Merging Two Communities," an oral history project.

**Dakota County:** Dakota City Heritage Village, Inc., \$2,461, for

conversion of collections management to PastPerfect museum software.

**Freeborn County:** Freeborn County Historical Society, \$550, to purchase PastPerfect museum software and upgrade its computer network.

**Hennepin County:** Golden Valley Historical Society, \$3,500, restroom upgrade to ADA standards.

**Lake County:** Finland Minnesota Historical Society, \$1,200, for "Reviewing Finland," a project to preserve and stabilize the FMHS photo collection.

**Martin County:** Fairmont Opera House, Inc., \$2,788, for repair of building trusses. The Fairmont Opera House is listed on the National Register of Historic Places.

**McLeod County:** McLeod County Historical Society, \$2,000, to purchase U.S. census and county newspaper microfilms.

**Otter Tail County:** Otter Tail County Historical Society, \$1,750, to purchase archival storage supplies.

**Redwood County:** Laura Ingalls Wilder Museum and Tourist Center, \$2,990, to purchase microfilm of Walnut Grove newspapers.

**Renville County:** Renville County Historical Society, \$3,500, for its machine shed storage and lighting project.

**Rice County:** Northfield Historical Society, \$5,000, to repair eaves and gutters on the Scrivner Block. The Scrivner Block is listed on the National Register of Historic Places.

**Stevens County:** Stevens County



Fairmont Opera House, Inc.

Emergency repairs to the roof trusses of the 1901 Fairmont Opera House in Martin County saved it from imminent collapse.

Historical Society, \$5,000, for restoration of the Morris Carnegie Library entrance. The Morris Carnegie Library is listed on the National Register of Historic Places.

**Washington County:** City of Marine on St. Croix, \$1,250, for climate control in Township Hall, Marine on St. Croix Historic District. The Marine on St. Croix Historic District is listed on the National Register of Historic Places.

**Winona County:** Winona County Historical Society, \$5,000, for reroofing the Winona Armory in the Winona Commercial Historic District. The Winona Commercial Historic District is listed on the National Register of Historic Places.

**Wright County:** Cokato Historical Society, \$4,000, for roof replacement on the Akerlund Photographic Studio. The Gust Akerlund Photographic Studio is listed on the National Register of Historic Places.

**Yellow Medicine County:** Yellow Medicine County Historical Society, \$1,200, for "Preserving Our Past," a collections storage project.



State Historic Preservation Office

A state grant-in-aid will support restoration of the entrance to the Neoclassical Morris Carnegie Library, built in 1905.

## Interpreter publication schedule to change

### Newsletter moves to six issues a year

Among the many cuts to Minnesota Historical Society programs and services necessitated by the state budget deficit is a reduction of the Interpreter's frequency of publication. Beginning with this issue, the Interpreter will be published six times a year rather than nine.

The new bimonthly publishing schedule will still accommodate the quarterly Preservation Planner:

- January-February / Winter Planner
- March-April / Spring Planner
- May-June
- July-August / Summer Planner
- September-October / Fall Planner
- November-December

#### Plan ahead

What does this mean for you, our readers? It means that you'll have to plan even further ahead to get news of your coming events in the newsletter. To be considered for inclusion in the November-December issue, for example, your news must reach the editor by the first of September, two months before publication. That's two months' advance notice for November events and three months for December events – a stretch for many organizations.

Think of the Interpreter, instead, as a place for reporting the success of your programs and events AFTER the fact. To do that best, you'll need photographs of your event. So be sure to take plenty of pictures!

When timeliness is a factor for the news you want to share, a better bet is to announce your events, job openings, etc., in MNLOCALHISTORY, the Society's free list service, which reaches nearly 300 individual and

organizational subscribers. The weekly digest of news and announcements is e-mailed to subscribers every Wednesday. All items submitted for inclusion are sent to a list moderator for approval.

If you are not yet a user of the list service, subscribe now. Send an e-mail, with "SUBSCRIBE MNLOCALHISTORY" as the sole text, to [majordomo@state.mn.us](mailto:majordomo@state.mn.us).

#### A place for ideas, issues and trends

The Interpreter will continue publishing such information as grant deadlines and field workshop dates. But our emphasis will be on less time-sensitive topics – raising issues and tracking trends affecting Minnesota's history organizations, sharing your program ideas and "best practices" in Around the State, imparting widely applicable technical information in the occasional Tech



## Sign up now for preservation conference

### See Planner for details

New Ulm will host this year's Statewide Historic Preservation Conference, set for Sept. 18-19 in the city's historic Turner Hall. Addressing the theme "Making Historic Preservation Work in

Talk, and featuring useful tools and materials in the Resources section.

Our goal is to give you information that will help all of you carry out your missions – to collect, preserve and interpret the history of your communities for generations to come.

Hard Times," the conference includes a session on the economics of reusing historic buildings.

See page 4 of the enclosed Preservation Planner for details.

## Funding loss *continued from page 1*

period," says director Nina Archabal. "But it pains us greatly to reduce our service to Minnesotans. We take very seriously our responsibilities as an educational institution, a steward of our state's history, an employer and an economic driver for our communities. Despite these severe cuts to our budget, we will continue to serve the people of Minnesota with excellence and innovation."

### Fall grants round survives

One of the programs hard hit by budget cuts is the State Grants-in-Aid program. Only \$50,000 per year will be available to award in each year of the biennium. Because the amount is so small, there will be only one round of state grants-in-aid each year instead of two. The fall 2003 round will go

ahead; the winter 2004 round will be canceled. Application deadlines for the fall round are:

- Aug. 1** Pre-application due.
- Aug. 29** Grant application due.
- Oct. 2** Grants Review Committee meets.

The funding shortage also means there will be some restrictions on grant categories, award size and eligibility requirements. For the latest information on grant guidelines, go to [www.mnhs.org/about/grants/index.html](http://www.mnhs.org/about/grants/index.html). You may also call David Grabitske at 651-297-4416 or e-mail [david.grabitske@mnhs.org](mailto:david.grabitske@mnhs.org).

"The cuts are very disappointing," says Tim Glines, manager of outreach services. "We expected some reduction because of the state's

current economic difficulties, but the deeper cuts will be felt throughout Minnesota's community of historical organizations. It's important to remember that, although the 2003 legislative session is over, our work of making the case for public funding of historical organizations is ongoing. Future issues of the Interpreter will address ways to explain the public benefit of our work to decision makers."

### Capital grants funded

Thanks to a provision in the state bonding bill passed by the legislature, the Society will have \$300,000 available for State Capital Projects Grants-in-Aid. See page 1 of the enclosed Preservation Planner for details.

Minnesota History Interpreter is published bimonthly by the Historic Preservation, Field Services and Grants Department of the Minnesota Historical Society.

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