

08/03/09 WORKING DOCUMENT

# *Legacy*

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• *Awareness* • *Restoration* • *Sustainability*

**Wabash Valley Trust for  
Historic Preservation  
Lafayette, Indiana**

**Strategic Plan: 2009-2015**

**February 2009**

## PREAMBLE

*“Community revitalization and historic preservation are uniquely compatible principles. When used together, they create sustainable, vibrant places to live work and play. At its essence, preservation-based community development uses existing historic resources—the older and historic built environment—to improve the quality of life for residents of all income levels. Historic preservation can be employed to create and preserve affordable housing, generate jobs, retain existing businesses, attract new ones, increase civic participation and bolster a community’s sense of place.”*

-- National Trust for Historic Preservation [2009]

The year of 1973 marked a beginning. Faced with the prospect of the impending demolition of four historic structures on the Wabash River bluff at the Indiana Veterans Home, a group of concerned citizens banded together that year to save the area and its buildings. The group named itself the Wabash valley Trust for Historic Preservation. The buildings were transferred to the Indiana Department of Natural Resources, Preservation Division, and were subsequently designated as a National Register District for further protection.

The Trust expanded its vision to include preservation of the built environment including urban districts, neighborhoods and rural areas. This meant committing to influence the long-range future of preservation in the Wabash Valley. As a result the Trust has served as advocate for the creation of numerous National Register Districts throughout the city of Lafayette, West Lafayette and Dayton. First housed in the basement of the Loeb House Inn, then in the Wetherall Library at the Tippecanoe County Historical Association, its latest quarters have been at the restored John and Arkansas Graves House at 325 N. 5<sup>th</sup> St. Since 1997 the Trust has employed an Executive Director, and more recently added an Office Manager and Construction Supervisor.

With a focus on supplying resources for the community at large in its efforts toward preservation, the Trust has published several manuals: *Guide to Researching Your Historic Building, A Look into History – Architectural Styles of Greater Lafayette Neighborhoods, The Tippecanoe County Interim Report – an inventory of Historic Sites and Structures*. In 2006, *The Resource Guide – Design Guidelines for Lafayette Local Historic Districts and Guide for Preserving and Restoring Your Historic Building* – was published. The Arnold Memorial Collection, a library of books and publications, is available for use by the public.

Since 1987, the Trust has striven to recognize those individuals throughout the community who are dedicated to preserving the Wabash valley’s rich architectural, historical and culturally significant structures. Twice each year the Trust awards plaques to those having done work in preservation, ensuring the vitality of the community. The plaques are prominently displayed on buildings, to remain into perpetuity and marking them as important historic structures. The most exemplary efforts in restoration are honored with the Silk Purse Award and the Johanna Downie Preservation Award. Through its annual *Endangered Structures* publication and press conference, the Trust serves as a voice for cultural resources in danger. Ten buildings are listed in the publication each year, remaining there until they are saved or lost, a tool for saving the community’s most important cultural resources.

Partnerships with private and public entities are responsible for this saving of threatened structures such as the Lafayette Theater, the Five Points Fire Station, the four historic buildings at the Indiana Veterans Home site, Entomology/Agricultural Hall on the Purdue campus, and an 1890's Empire duplex on S. 6<sup>th</sup> St. Single-family homes are being restored through HOME Funds and will be sold to low/moderate income families upon completion. The Trust receives considerable financial support through CHDO, Community Housing Development Organization, in partnership with the City of Lafayette's Development Department. The Trust maintains membership in Tippecanoe Arts Federation, Historic Landmarks Foundation of Indiana, and the National Trust for Historic Preservation – signifying its purpose, and its connectedness with the greater community, the state, and the nation.

Recently initiated is a program entitled “Building Knowledge Workshops” in which the public participates for awareness and capacity in order to actually restore historic buildings. In May of each year the Trust has established “Preservation Month” featuring numerous events for raising public consciousness concerning the importance of preservation. Through its November annual meeting and special presentations, the Trust further increases outreach to the community concerning its public purpose.

The Trust is now at a key point in its life to reflect upon its past and chart its course for its future. The leadership it has provided to the community toward historic preservation—for advocacy, partnerships, and preservation of historic structures—have set milestones for the Greater Lafayette community. The Trust now looks toward enhancing its role with wider and deeper reach in the community to establish a legacy for historic preservation. The strategic plan that follows characterizes this vision of “**Legacy**” and the positive impact it would create in advancing the civic value of historic preservation to play a vital role in enhancing quality of life.

To that end, the Trust will persist.

To that end, the Trust will persevere.

To that end, the Trust will prevail.

## **MISSION**

### ***Preservation***

*The Wabash Valley Trust promotes historic preservation through restoration and visibility of architectural heritage of the community.*

#### **Key Characteristics:**

- Public awareness and appreciation of historic structures, spaces, and neighborhoods in the community.
- Community support for restoring and preserving structures and spaces of historic significance in community neighborhoods.
- A collection of preserved and restored historic structures and spaces with special visibility in the community.
- A knowledge base for historic preservation, its purpose and value, best practices, and consultative references for preserving, restoring, and sustaining historic buildings.

## **VISION**

### ***Legacy***

*The Wabash Valley Trust will be recognized as the leading force in community historic preservation, building a legacy of civic value to enhance quality of life.*

#### **Key Characteristics:**

- Recognition of historic structures drawing regional/national attention enhancing their historic presence and civic value in the community.
- Showcasing the cultural ancestry of the community inherent in structures and spaces of historic significance.
- Expansion of well-restored and preserved historic neighborhoods that bring pride to the community and enhance tourism attention.
- An educated community that is sensitive to the need to identify structures of historic significance and champion their sustained preservation and restoration as community assets.

## **GOALS**

### **Goal 1: Awareness**

*Achieve widespread awareness of the value and public imperative of historic preservation in the Greater Lafayette community.*

#### **Key Characteristics:**

- Community understanding of the purpose and civic value of historic preservation with its acceptance as a community responsibility.
- Recognition of the public value added to the community by the preservation of historic structures and their adaptive reuse.
- Public support toward identifying and preserving historic structures, recognizing them as community assets.
- A rich mix of learning resources, programs, and services and that are well subscribed by the members of the community.

#### **Key Strategies:**

- Implement a marketing plan for historic preservation in the community utilizing multiple approaches and media, and addressing a wide range of community audiences.
- Develop and present educational programs that raise preservation awareness and how it can benefit the community in improving neighborhood quality.
- Identify endangered structures worthy of preservation and publicize their community value to garner public support for their preservation and rehabilitation.
- Enhance the information resource base for generating and nurturing public interest in preservation, and consultancies toward active preservation.
- Recognize successful preservation projects drawing widespread public attention and celebrate their civic value as community assets through experiential opportunities.
- Forge partnerships with civic organizations and economic development agencies to broaden the role and impact of historic preservation in the community.

#### **Key Metrics:**

- Results of marketing plan implementation; impact.
- Number and types of educational programs, and participants.
- Inventory of endangered structures; annual update; scope of publicity achieved.
- Scope and types of information resources available to the public.
- Number and types of projects recognized.
- Number and types of partnerships; impact.

## Goal 2: Restoration

*Champion active preservation that restores and rehabilitates historic structures and spaces, thus showcasing community heritage and neighborhood quality.*

### Key Characteristics:

- Model examples of historic preservation in the community that signify community heritage, cultural ancestry, and rehabilitation potential.
- Active preservation programs that undertake rehabilitation of historic structures and spaces, expanding their presence in the community contributing to neighborhood quality.
- Recognition of preservation practices and outcomes, drawing regional/national attention, that foster educational and tourism interests.
- A pervasive culture of preservation that demonstrates public sensitivity and commitment, and encourages community leadership and public service.

### Key Strategies:

- Undertake a sustainable level of affordable housing/CHDO projects annually (through funding from the Lafayette Housing Consortium)) with the highest standards of preservation and rehabilitation practices. *(edited 7.13.09 as per City of Lafayette Comm. Dev. Dept.)*
- Assist community members with consultancy services providing constructive advice and information toward preservation activities.
- Collaborate with neighborhood associations, preservation organizations, and other housing organizations in conducting programs and projects to develop synergistic interests.
- Compile an information base of qualified preservation contractors and volunteers, meeting necessary standards and certifications, and salvaged building parts, for referral purposes.
- Involve community leaders in preservation proposals and projects, and in designating exemplars as state-of-the-art models in neighborhoods.
- Incorporate “green practices” in preservation projects, and strive to achieve LEED certifications whenever possible.

### Key Metrics:

- Number of CHDO projects undertaken.
- Number of community members / organizations served.
- Number and types of collaborations; impact.
- Completion of information base; annual update.
- Number and areas of leadership involved; number and types of exemplars created.
- Record of “green practices.”

### **Goal 3: Sustainability**

*Secure financial, physical, and human resources for ensuring long-term sustainability and advancement of the Trust.*

#### **Key Characteristics:**

- Organizational stability with sustained resources attending to responsible stewardship, and accountability to stakeholders.
- An involved and active Board that is engaged in expanding financial and physical resources, memberships, donor and volunteer base, and partnerships with sister organizations.
- Stability of high quality staff with dedication and commitment to advance the organization with efficiency and effectiveness.
- A robust breadth of community members, committed to long-term support toward historic preservation, and actively engaged in ensuring the Trust’s sustainability.

#### **Key Strategies:**

- Redefine Board responsibilities, expectations, and commitments in order to reposition the Board with training for refocused role and scope, effective stewardship, and accountability.
- Recruit, retain, and nurture high quality staff with competitive compensation, professional development opportunities, effective and efficient empowerment, and rewards/recognition.
- Enhance the involvement of community members to increasingly secure public interest in preservation and their support toward the sustainability of the Trust.
- Undertake grant-writing, friend-raising, and a well-crafted fund-raising plan involving Board members and community leaders to garner funding for the Trust’s operations and priorities.
- Increase memberships and the continuing donor base to sustain operational and advancement programs, and to enhance the Trust’s presence in the community.
- Engage a breadth of audiences in organizational activities, and develop a strong volunteer base that complements the Board and the staff in management and operations.

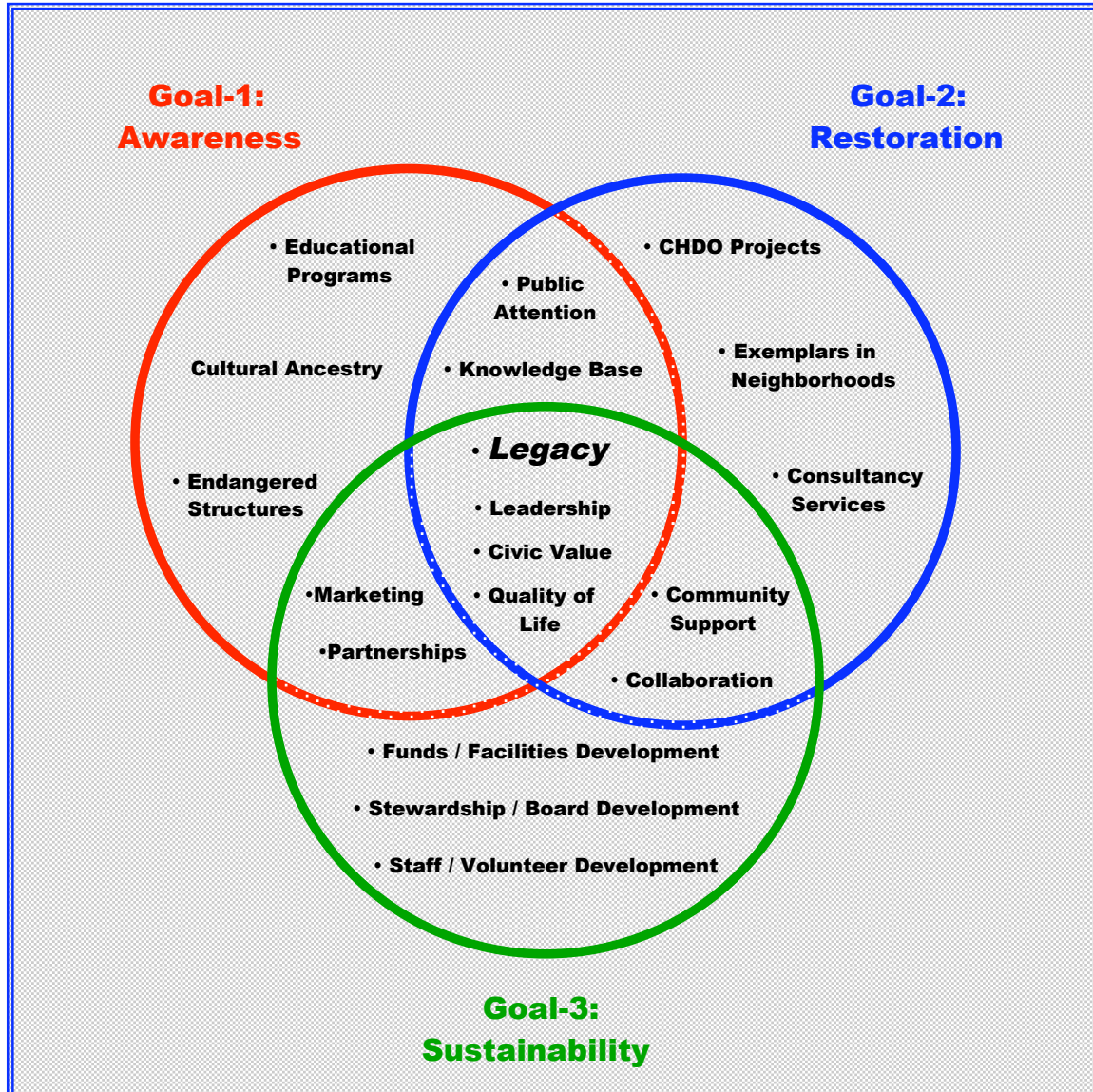
#### **Key Metrics:**

- Redefinition/codification of Board responsibilities, expectations, commitments.
- Staff recruitment/retention rates; number and types of professional development programs.
- Number and types of community member involvement; impact.
- Number of grant proposals written; number/amounts funded; annual fundraising results.
- Number of memberships; number of donors.
- Number and types of audiences, and volunteers.

## PLAN CONCEPT

# Legacy

• **Awareness** • **Restoration** • **Sustainability**



**Wabash Valley Trust for Historic Preservation**



## **BENCHMARKS AND PEERS**

The Wabash Valley Trust will assess its progress with this strategic plan using the metrics identified with each goal, and a number of benchmarks for comparison with a select set of peer organizations. These peers are selected based on their success characteristics, reputation, and the best practices they employ. The benchmarks are selected based on the Trust’s intent to measure its progress toward its visionary position to establish a “*Legacy*” of leadership in historic preservation in the community. These benchmark measures will be further defined for specificity, clarity, accuracy, and consistent comparability as a part of the plan implementation process.

### **Benchmarks**

#### **Input Measures**

- Annual operating budget and source of funds.
- Staff size, compensation, and professional development.
- Volunteer base and volunteer development.
- Community partnerships and collaborations.
- Fund development – public funds, grant/sponsored funds, fundraising.

#### **Output Measures**

- Restoration/preservation projects completed.
- Regional/Community recognition for successful projects/exemplars.
- Knowledge resources, educational programs, and services provided.
- Community recognition of civic value contributing to economic development.
- Community visibility integral to quality of life enhancement.

### **Peers**

Initially, six peers are identified for benchmark comparisons as listed below. This list will be adjusted over time based on continued review of their characteristics, and/or expanded when additional peers can be identified.

- Bloomington Restorations, Inc., Bloomington, IN.
- Franklin Heritage, Inc., Franklin, IN.
- The Blue Grass Trust for Historic Preservation, Lexington, KY.
- Cleveland Restoration Society, Cleveland, OH.
- Columbus Landmarks, Columbus, OH.
- Cincinnati Preservation Association, Cincinnati, OH.

## **KEY PRIORITIES AND INVESTMENT AREAS**

Achieving the vision of “*Legacy*”– will require the setting of key priorities, and judicious investment of resources in targeted areas. Revenues from various funding sources will be sought and utilized to achieve the goals of this strategic plan. Many of the strategies described in this plan will be undertaken using existing resources. However, several key priorities will require new or increased investments. The priorities and corresponding investments during the plan period are categorized as follows:

- Base-line stability in operating budget
- CHDO projects (undertaking 2-5 per year)
- Aggressive marketing and (cost of) fundraising
- Community and agency partnerships
- Educational programs and informational resources
- Staff and volunteer growth, and professional development
- Board training for breadth of responsibilities and stewardship

<b>KEY PRIORITY</b>	<b>\$ PROPOSED</b>
	<b>Annualized Steady-state by 2015</b>
<b>Base-line stability in operating budget</b>	<b>\$ 50,000</b>
<b>CHDO Projects (2-5 per year)</b>	<b>\$ 100,000</b>
<b>Aggressive Marketing and (cost of) Fundraising</b>	<b>\$ 30,000</b>
<b>Community and Agency Partnerships</b>	<b>\$ 3,000</b>
<b>Educational Programs and Informational Resources</b>	<b>\$ 10,000</b>
<b>Staff and Volunteer Growth / Professional Development</b>	<b>\$ 100,000</b>
<b>Board Training for Breadth of Responsibilities and Stewardship</b>	<b>\$ 1,000</b>
<b>TOTAL NEW INVESTMENT</b>	<b>\$ 294,000</b>

This increase in annualized funds is expected to reach its steady state by 2015. Growing from the 2009 annualized level of \$708,313 to \$1,002,313 in 2015, it is an aggressive growth of around 41% over six years -- representing the additional funds needed to successfully implement this plan. The Trust leadership team will develop appropriate funding models to realize this growth.

## IMPLEMENTATION

Implementation of this strategic plan will begin upon its approval by the Board of Directors of the Wabash Valley Trust. Based on the goals, strategies, and priorities identified in this plan, annual action plans will be developed by staff leadership to work toward achieving the goals. These action plans will be approved by the Board and then implemented by the staff with oversight by the Board's Strategic Planning Committee – a committee the Board will establish in order to inform action planning, coordinate plan implementation, and monitor progress. The committee will report quarterly to the Board on the progress, as the entire board will have oversight and accountability.

**The development of annual budgets will be aligned with annual action plans consistent with the priorities of the strategic plan. This will clearly demonstrate the Trust's commitment to achieving the goals and the corresponding transparency of resource utilization in the interest of stewardship and accountability.**

The Board will conduct annual progress assessments to document the outcomes relating to the strategic plan priorities. These assessments will be based on the metrics and benchmarks identified in the plan – with further definitions for specificity, scope, and availability of peer data. The metrics and benchmarks will also reflect appropriate timelines and targets to be met. Annual reports will be presented to the Board, partners, donors, and the community on the progress achieved with the strategic plan.

With this strategic plan – “*Legacy*” – the Wabash Valley Trust has positioned itself as a vital asset in the community to support the Greater Lafayette Community in its strategic plan quest for becoming a “*Place of Choice*.” The Trust looks forward to strengthening and expanding community partnerships and donor support dedicated to undergirding and entrusting its programs and services. It is hoped that the value of the Trust's presence and contributions toward enhancing quality of life will be resounding throughout the community it serves.

*“... Preservation has always sustained America. By protecting and enhancing the buildings, communities and landscapes that tell America's story, preservation allows us to maintain tangible contact with the places where our identity as a nation was established and our character as a people was shaped. By helping us understand the process that made us who we are, preservation gives us the confidence to become who we can be. ...”*

-- Richard Moe, President, National Trust for Historic Preservation  
December 13, 2007.