



# ESTABLISHING A HISTORY AFFILIATES PROGRAM FOR HISTORY AND HERITAGE ORGANIZATIONS IN THE GREATER PHILADELPHIA REGION

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Historical Society  
of Pennsylvania

# History Affiliates Final Report

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## Executive Summary

History is undeniably one of most significant defining characteristics of Southeastern Pennsylvania. Tourists and residents alike cite Philadelphia's history as one of the main reasons they visit the city. Of all the arts and cultural organizations in our region, history organizations have the highest levels of attendance, with 3.9 million visits, representing over a quarter of all the visits to cultural organizations.<sup>1</sup> Despite the enormous impact history organizations have on the quality of life and economy of our region, the history sector in Southeastern Pennsylvania is struggling, as are many of its individual organizations. These organizations, many of them small and volunteer-run, face unprecedented economic, technological, demographic, and social changes and challenges. There are many regional and web-based service providers that offer services to support these organizations but most organizations are so busy with day-to-day survival that they do not have the time to research and aggregate these resources. Moreover, even though numerous other types of organizations—such as theater and dance—within the larger Philadelphia arts and cultural sector have discipline-based support organizations, surprisingly no such group exists for history. The result is fragmentation, disorganization, and lack of coordination in the sector that weakens both individual organizations and the regional cause of historical preservation and education.

This report is a result of an intensive nine-month research project led by consultant Calista Cleary on behalf of the Historical Society of Pennsylvania (HSP). The research focused on approximately 330 regional heritage organizations with the purpose of investigating the need for, and viability of, a centralized support agency for the history and heritage organizations of Southeastern Pennsylvania. In summary, the research shows:

- A clear need, and a willingness to participate in, a history and heritage consortium led by HSP.
- A desire on the part of other support agencies to have a coordinating organization through which they can communicate with the history community.
- A recommended membership structure that lowers the barriers of cost and participation.
- An emphasis on developing a strong network through online communication and problem-solving at the organizational level.

This research leads to the recommendation of a two-phase program. Phase I involves hiring a full-time director for two years, maintaining an active twelve-person advisory board, implementing a three-tiered membership program with basic membership free to registered non-profit organizations, piloting a national mentoring program, and initiating a recognition luncheon serving the history and heritage community. Emphasis is placed on building a strong community through online communications and providing critical support through targeted workshops,

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<sup>1</sup> Greater Philadelphia Cultural Alliance, *2008 Portfolio*, (Philadelphia, 2008), 39.

professional development opportunities, and one-on-one strategic planning. Close coordination with other service organizations in the region is stressed as part of a *systems* approach to strategic growth. Care in avoiding duplication of support services, and understanding the local ecology of each organization's culture is important.

Phase II in large part depends on outcomes of Phase I, but seeks to become even more strategic in mentoring organizations, attracting and managing a re-granting program, and encouraging resource sharing, strategic alliances and a rationalization of the history and heritage community of Southeastern Pennsylvania.

## **Background**

On September 14, 2009, HSP's Board approved a four-year strategic plan that included a revised mission statement "to inspire individuals and organizations to create a better future through historical understanding" that focused less on its collections and much more on people and audiences it serves. The first year (2010) was intended to "plan the plan" and one of the six strategic goals identified was to investigate how to "increase support to the history and heritage organizations of Pennsylvania." The research and recommendations detailed in this report represents part of that planning phase.

Conversations during the time of the strategic planning process corresponded with severe budget cuts to the heritage community by the Commonwealth of Pennsylvania in late 2008. Discussions had intensified between the Pennsylvania Historical and Museum Commission (PHMC) located in Harrisburg, the Senator John Heinz History Center (Heinz) located in Pittsburgh, and HSP, about how to address the severe distress being felt amongst some of the smallest entities across the state's heritage community. Throughout the fall of 2008 HSP hosted meetings in conjunction with the Greater Philadelphia Cultural Alliance (GPCA), to coordinate advocacy efforts. At the same time, a number of small to mid-sized organizations reached out to HSP directly for help, with requests ranging from leading protests against the government cuts, to wanting advice on how to scale back operations, to developing new marketing campaigns, and/or attracting fundraising dollars.

HSP, which had a 2% reduction (from 2.2% to 0.3%) of its operating budget from state funding, was less affected by the government cut backs than most of its peers.<sup>2</sup> However, during HSP's strategic planning process, the board and staff were trying to reconcile its budget in the face of dwindling resources whilst recognizing it was still one of the largest and most stable of the history organizations in southeastern Pennsylvania. Other organizations were turning to HSP for help. HSP's board and staff finally agreed that continuing to avoid taking on a larger role within

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<sup>2</sup> Currently HSP received \$10,000 from the Commonwealth of Pennsylvania. For the 14 years previous to 2008 it also held a \$50,000 contract to provide education materials on ethnic and immigrant history across the state. This contract was cut with the state's cut backs.



the history and heritage community would eventually damage its own standing amongst its peers, and further contribute to the weakening of the sector. Even more importantly, HSP recognized that unless it accepted a leadership role, its own activities would likewise remain unfocused, as so much of its work involves collaborations with local organizations. The question, of course, was whether HSP clearly understood and could sustain the expectations of others in the field.

Philadelphia's history community was acknowledged in 2007 as "disorganized" and "fragmented" in the RAND report commissioned by the William Penn Foundation and the Pew Charitable Trusts.<sup>3</sup> Since then, not much has changed. The Greater Philadelphia region has always been recognized as both the largest and most complex cluster of history organizations within the commonwealth. But in 2008 when state funding was threatened, the lack of leadership in the region made it difficult to coordinate protest efforts. Part of the problem was that the two organizations that might have served this role, the Greater Philadelphia Cultural Alliance (GPCA) and the Pennsylvania Federation of Museums and Historical Organizations (PFMHO) were constrained. For example, while twenty percent of GPCA's 450 organizational members come from the history community, most are well established organizations that do not fit the typical Affiliates profile. The majority of potential Affiliates operate "off the radar" because they have no paid staff and have minimal budgets. In contrast, PFMHO, based in Harrisburg, has a wider group of history members, but represents organizations throughout the state. To many organizations PFMHO is too removed from the Philadelphia-region community and lacks the ability to actively advocate on its behalf.

Initial rough estimates placed the number of organizations in the Philadelphia five-county region at between 480 and 500, but with judicious paring-back HSP has created a database of around 330 entities. Most of these organizations struggle to sustain operations and survive with no paid staff and small budgets of less than \$250,000. According to the *2008 Portfolio* report from the Greater Philadelphia Cultural Alliance (GPCA), 40% of southeastern Pennsylvania's cultural organizations operate with a deficit (22 % with deficits greater than 10%). Moreover, while the GPCA's 2009 *Research into Action* report cites that living museums and historic sites are the 2<sup>nd</sup> and 3<sup>rd</sup> most visited cultural attractions in the region with around 84% of participation by the total population, with 68% of them providing free admission. Additionally, they are twice as reliant as other arts/cultural organizations on foundation and government support, making them particularly vulnerable to financial instability.

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<sup>3</sup> *Arts and Culture in the Metropolis: Strategies for Sustainability*. Eds. Kevin F. McCarthy, Elizabeth Heneghan Ondaatje, and Jennifer L. Novak. RAND Research in the Arts, 2007. This study was supported by the William Penn Foundation and the Pew Charitable Trusts. The report states: "The disorganization and fragmentation within the historical sector could reduce the opportunities for collaboration with the arts sector." (pg. 64)

## Consensus Amongst Service Providers

On November 23, 2009, HSP convened a meeting of 16 non-profit service providers to discuss whether there truly was a need, despite the disparaging remarks of the RAND study, to establish *yet another* entity serving the history and heritage sector. Participants included the City of Philadelphia's Office of Arts and Culture and the Creative Economy (OACCE), the Preservation Alliance for Greater Philadelphia (Preservation Alliance), the Greater Philadelphia Cultural Alliance (GPCA), the Arts & Business Council of Greater Philadelphia (Arts & Business), the Conservation Center for Art and Historic Artifacts (CCAHA), Germantown Preserved, the Pennsylvania Humanities Council (PHC), the Pennsylvania Historic and Museum's Commission (PHMC), the Greater Philadelphia Tourism and Marketing Corporation (GPTMC), the Philadelphia Area Consortium of Special Collections Libraries (PACSCL), the Civil War History Consortium (CWHC), the Free Library of Philadelphia, Penn Praxis, CultureWorks, RemerTalbot, and the Governor's Southeast Regional Office [See Appendix A].

The consensus at the meeting was that while each service organization ran programs and services with very little overlap in the types of activities being offered, there was ignorance on the part of the small history and heritage organizations that *so many programs already existed*. Indeed the plethora of programs offered by these 16 entities *is* confusing and it is not transparent how they can be used together to help strengthen organizational capacity. The idea of having an organization that aggregated information on behalf of the heritage organizations about what services existed was considered highly desirable.

In addition, it was recognized that many of the smaller organizations who had few staff and/or were largely volunteer run, did not in fact know what types of services they needed. It was clear from the discussion that many small organizations were convinced that strengthening fundraising and hiring a full-time executive director, for example, would lead to growing their operations, when the real issues relate to strategic planning and board involvement. The idea of having an organization mentor smaller organizations to help them develop a needs assessment and recommend which types of programs to avail themselves of, was very compelling to the group.

Even more compelling was the idea that if HSP undertook this role through the Affiliates program, they would be more aware of local challenges and therefore be able to provide strategic support over the long term. Service providers at the meeting lamented the fact that often organizations received grants to hire outside consultants unfamiliar with Philadelphia's cultural environment. They perform an internal assessment, give their recommendations, and then leave with little follow-up. While outside consultants are excellent at taking an inward look at an organization's situation, leaders in the Greater Philadelphia non-profit sector increasingly believe that understanding the ecology of Philadelphia's non-profit community by working with *local* consultants and engaging in collaboration, partnership, networking, and resource-sharing *with others* will help many of the smaller organizations succeed.

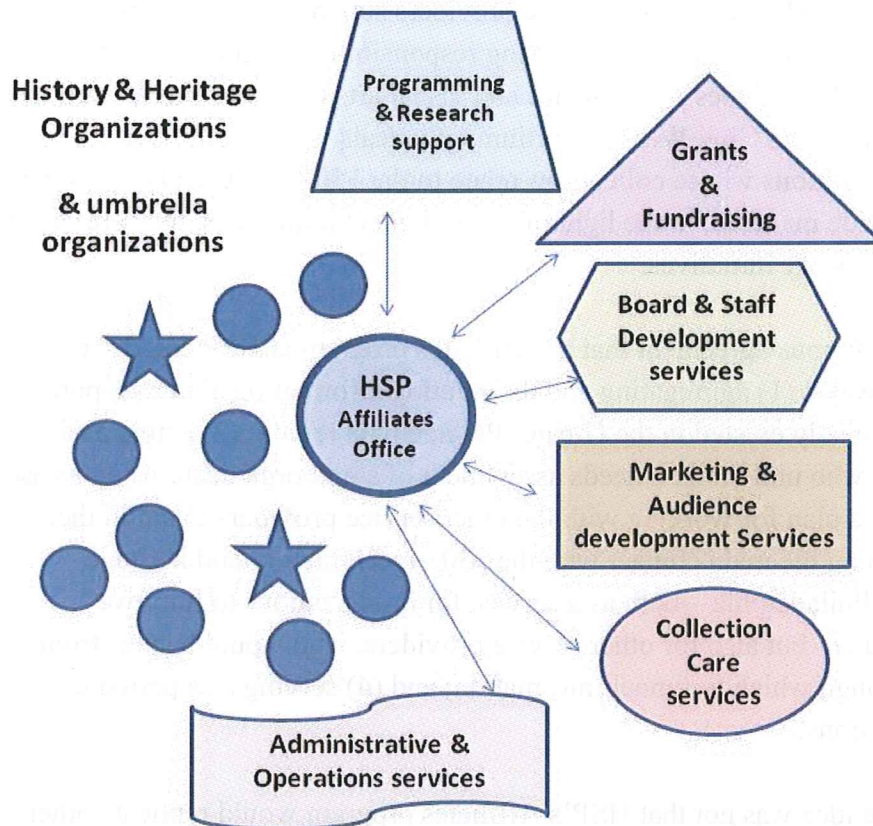


Finally, it was understood that while most of the service providers supported history and heritage organizations in some way, none took an all-encompassing responsibility for the sector. The GCPA membership, for example, includes performance and visual arts organizations as well and libraries, museums and theatres. The Civil War Consortium only deals with developing programming for those organizations whose collections relate to the 150<sup>th</sup> anniversary of the war. Though PHMC has a state-wide mandate, in the light of recent budget reductions, they are much less able to support regional history initiatives.

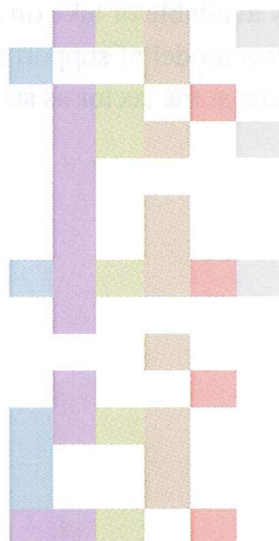
In conclusion, there was unanimous agreement that an Affiliates program at HSP could serve a very important role in three ways: (1) aggregating and distributing information about support services and programs that already existed in the Greater Philadelphia region; (2) acting as a “mentor” or local consultant who undertook a needs assessment of small organizations on a case-by-case basis and prescribed a plan for working with the other service providers to aid in their capacity building; (3) becoming the main contact with the 330+ small history and heritage organizations in the Greater Philadelphia—both as a service for organizations to improve communication with each other, but also for other service providers, who would benefit from having one organization through which to funnel information; and (4) serving as a periodic convener of history organizations.

At the end of the meeting the idea was not that HSP’s Affiliates program would replicate other programs and services already available or take on a central control-and-command model, but rather look to a dispersed *system* model of support that positioned the program to act as “broker” of information and advice amongst the sector as schematically shown below:





Arts & Business Council of Greater Philadelphia  
 Civil War History Consortium  
 Conservation Center for Art and Historic Artifacts  
 Cultural Alliance of Greater Philadelphia  
 Foundation Center / Free Library  
 Greater Philadelphia Tourism & Marketing Corporation  
 Historical Society of Pennsylvania  
 Office of Arts & Culture / City of Philadelphia  
 Penn Praxis  
 Pennsylvania Historic and Museums Commission  
 Pennsylvania Humanities Council  
 Philadelphia Area Consortium of Special Coll. Libraries  
 Preservation Alliance for Greater Philadelphia



Programming & Research	Blue square
Grants & Fundraising	Purple square
Board & Staff Development	Green square
Marketing & Audience Development	Brown square
Collection Care Services	Pink square
Admin. & Operations Support	Grey square

## Investigative Phase

The Historical Society of Pennsylvania (HSP) hired Calista Cleary in April 2010 to follow up on the ideas discussed at the November 2009 meeting and investigate the viability of establishing a History Affiliates program for Southeastern Pennsylvania. Her research focused on three specific areas: conducting needs assessment with Southeastern Pennsylvania historical organizations; meeting with regional umbrella groups to determine what they are and are not doing; and



investigating organizations around the county that support history organizations at the regional level.

Specifically, Calista's research/investigation included:

- Creation of an organizational database with updated contacts (330 organizations)
- Development of an advisory group
- Site-visits and direct phone communication (63 of 330 organizations, or 20%)
- Distribution of a monthly e-newsletter
- Survey of potential affiliate members

## **Advisory Board**

Recruiting members for an advisory board proved challenging as many leaders of history organizations—mid-sized and small—are extremely over committed. In addition, geography constrained efforts since many people living within suburban counties are reluctant to commit extended travel time. Nevertheless, Calista was able to recruit a representative mix of twelve people from all the five counties as well as individuals who represent a variety of organizations in terms of type and scope [See Appendix B]. To date, the advisory board has met three times: in July, September, and November 2010. The group's members have been instrumental in identifying individual organizational needs as well as thinking about programs and services that would strengthen the regional history community.

## **Communication**

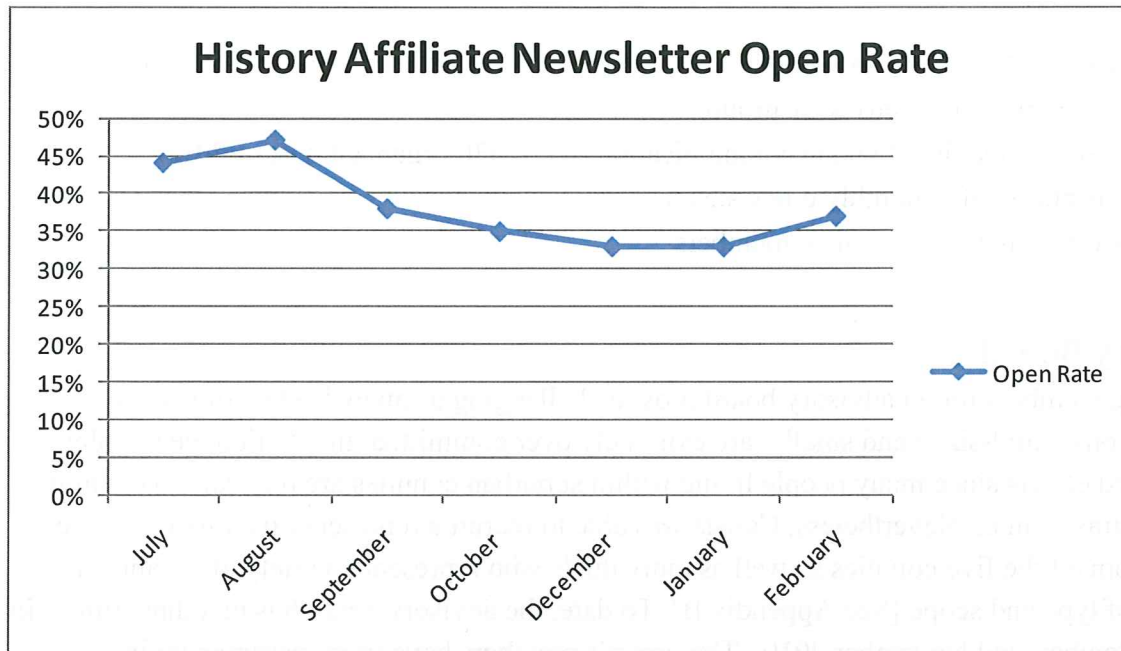
Calista quickly established electronic communication with organizations. On April 29, 2010 an electronic letter was sent to around 350 entities and resent on May 14<sup>th</sup> based on updated contact information [See Appendix C]. This first email introduced Calista as the Affiliates consultant and the Affiliates concept. On July 7, the first History Affiliates e-newsletter was sent. Since July, a newsletter had been sent monthly, with the exception of November when the survey was distributed. Over the summer, Master's Group Design created a logo based upon the style of the HSP logo giving the Affiliates its own identity, related to but distinct from the HSP brand.



**History Affiliates  
of Southeastern PA**

Since the first “branded” History Affiliates e-newsletter was sent, organizations have received information about resources, grant opportunities, notice of conferences and meetings, and issues that are of interest to historical organizations [See Appendix Items D & E]. These newsletters

have had a strong open rate, ranging from 32% to 46.7%. The largest number of unique click-throughs (individuals clicking on newsletter hyperlinks) tend to be for grant opportunities.



### “Creating Connections” Conference

The “Creating Connections” Conference took place at HSP on October 18, 2010. It was co-sponsored by the Conservation Center for Art and Historic Artifacts (CCAHA), the Greater Philadelphia Cultural Alliance (GPCA), and the Preservation Alliance for Greater Philadelphia (PAGP) [See Appendix F]. The event was designed not only to introduce the History Affiliates idea, but inform small organizations of the services that *are already* available to them (as discussed previously, this was identified as an issue in November 2009) and begin a conversation about the future of the history/heritage sector of Southeastern Pennsylvania as a whole. About 100 organizational representatives attended this conference—twice as many as had been estimated—which was important both in terms of identifying priority issues, and gauging interest in the long-term development of an affiliates-type program.

The conference featured two sessions. The morning session had several components: an introduction to the History Affiliates concept; a presentation of existing resources for nonprofits by CCAHA, GPCA, Preservation Alliance, and the Foundation Center at the Free Library of Philadelphia; a speaker, Andrew Masich, the President and CEO of the Heinz History Center in Pittsburgh who talked about the Affiliates program in the Pittsburgh region; and a breakout session to brainstorm and share ideas about what a similar initiative here in the greater Philadelphia area should include. The afternoon session was led by representatives of the



“People’s Contest”: A Civil War Digital Archiving Project. Project representatives explained their collections survey project and how Southeastern Pennsylvania organizations could participate and benefit.

Andrew Masich’s presentation on the Pittsburgh initiative was extremely relevant and sobering. Believing that “people value what they have to pay for,” the 125 Heinz Center Affiliate organizations all contribute a flat \$50 annual membership fee, which pays only a small portion of the Heinz Center’s estimated \$75,000 annual cost, the largest portion being the salary of a full-time coordinator whose salary is paid out of the Heinz History Center’s operating budget.<sup>4</sup> As Mr. Masich acknowledged:

*“That’s a tremendous commitment to our region, especially in the light of recent government cuts. But we feel strongly that we have to do everything we can to support the stewards of our heritage. The [Heinz Center] Affiliates as a group drive significant tourism dollars to our state and underpin the history education of our community.”*

Importantly, when asked what the single largest reason organizations chose to become an Affiliate was, Mr. Masich responded that it was to have direct access to the Heinz History Center’s staff and resources. “They feel,” he said, “as part of the Heinz History Center team.” Many participants expressed envy towards the Affiliates system in Pittsburgh and agreed that they would be willing to pay a membership fee to gain access to similar resources. As will be noted later in this report, this willingness to pay a fee was also borne out by follow up surveys.

Particularly in the breakout groups, there was spirited discussion about what organizations needed and a strong sense that people wanted to be more connected to each other. Many spoke of their frustrations as small organizations seeking to be recognized for their community impact amongst larger government agencies and the philanthropic community. The shared stories created a sense of camaraderie at the end of the day and a strong endorsement of an affiliates-type program regionally [Appendix G]. Afterwards Calista received a number of testimonials from participants who summed up the sentiments of Bruce Knapp from the Paoli Battlefield group:

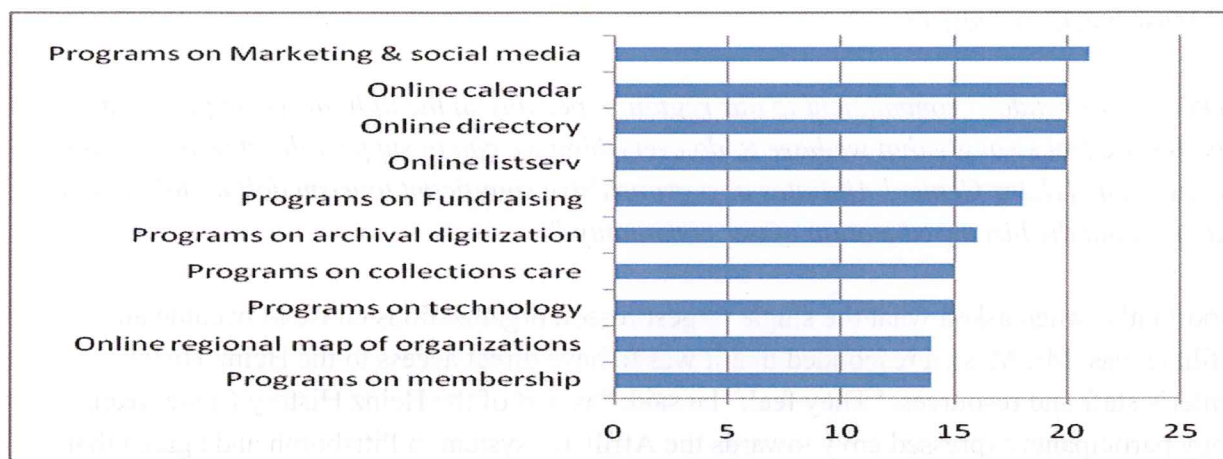
*My impression, observing and talking to the attendees, is that this was a perfect example of the “Field of Dreams” motto: If you build it, they will come. The timing of the HA grant during this challenging economic era made the acceptance of the concept almost a fait accompli. In fact, during my breakout session, the desire and confidence in the concept was so strong that I had to step back and ask them if they thought HA was an actual, existing, program or a planning step*

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<sup>4</sup> To put this in context, while the Heinz History Center has an annual operating budget of around \$8.8million, HSP has a \$2.7 million budget. The Heinz receives around 9% of its operating budget from government sources. HSP receives around 2.3%. The Pittsburgh Affiliates number 125 members, while it is estimated that the Philadelphia-region Affiliates could climb to twice that number.

*towards such a program. They all considered it a program that just needs to be implemented. The “table” combined some HA advisory council members, 3 persons who represented both service provider groups and separate preservation organizations and the rest straight preservation organizations. So I think it was a good mix.*

At the conclusion of the conference a survey was handed out [Appendix H], to which HSP received 37 responses. As can be seen from the top ten most sought after services, organizations asked for tools to market themselves and create an online community for shared communication and resource-sharing.



As the Conference survey confirmed, three priorities quickly emerged: (1) funding; (2) marketing/public relations; (3) communication and access to resources. A second tier of needs included collections care, visitation, membership, programming, board and volunteer issues, technology, exhibits and interpretation, and advocacy. Organizations identified a third tier of needs related to planning, including: preservation planning, strategic planning, disaster planning, and environmental controls.

## Regional Umbrella History Groups

Calista met or talked with representatives of regional umbrella history organizations including the Tri-State Coalition of Historic Places, the Rural History Confederation, the Chester County Historic Preservation Network (CCHPN), the Delaware County Historic Preservation Network, Historic Germantown, and the Fairmount Park Houses. The purpose of consulting with these organizations was: (1) to find out what programs and services these organizations were providing, and (2) to determine what they saw as the collective high-priority needs of their constituents.

Umbrella organizations tend to identify overarching needs of history organizations in the region, rather than the needs of individual organizations. They provide their members with marketing, limited workshops or professional development, and an opportunity to network and share



information. While these groups understand the broad needs of history groups in the region, their limited resources constrain them from fully addressing these needs. Each group struggles to sustain themselves through both money and staff time, and all were keen to learn about a possible Affiliates program for Southeastern Pennsylvania of which they could become a part.

The Tri-State Coalition of Historic Places, for example, which represents 25 historic sites and has an annual budget of \$1,000, voiced the need for a central organization that would advocate on behalf of history and heritage organizations to community leaders. They felt there was a strong need to lobby government and policy makers. They cited the desire for an umbrella organization that would support the smaller historical organizations in the region.

### **Umbrella History Groups Beyond the Philadelphia Region**

Calista's research also focused on examining organizations around the country that serve history organizations and investigated what programs and benefits they provide as well as how they fund their operations. The Ohio Historical Society (OHS), the Indiana Historical Society, and the Minnesota Historical Society (MHS) are three entities that support smaller historic organizations in their respective states. The local history office of the Ohio Historical Society offers a host of programs including workshops, networking, technical assistance, and on-site needs assessment. For a small annual fee correlated with their budget, organizations can take advantage of these services. The local history services department of the Indiana Historical Society (IHS) offers mostly free programs that fall into three broad categories: communication, training, and resources. Specific IHS services include a weekly e-newsletter, a lending library, workshops and consultations to individual organizations. Organizations can receive slightly upgraded services with an IHS membership. The Minnesota Historical Society offers three main services: networking, technical assistance and on site workshops and consultations. The organization also produces a weekly e-newsletter and a bi-monthly newsletter with more substantive content.

All of these organizations however, are primarily state-wide organizations with significant budgets subsidized in the range of 60% to 80% by local taxpayers. The annual operating budget of the MHS in St. Paul for example, is \$60 million with over 78% provided from annual appropriations. MHS includes two major museums, the state archives, and over 25 historic sites. In a way, MHS mirrors the Pennsylvania Historic and Museums Commission (PHMC) based in Harrisburg, who directly operates 11 sites, as well as the state museum, archives, and preservation office, and whose annual operating budget last year was \$18 million.<sup>5</sup>

The challenge with the state-subsidized model however, has been recently demonstrated when PHMC's annual allocation was cut by 52% over two years. Because PHMC staff are employed by the state, they are powerless to directly protest government cuts, and depend on their

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<sup>5</sup> It should be noted that PHMC's budget has been reduced 52% since FY 2008.

constituents to lobby policy makers on their behalf with mixed results. The coordinator of the local history office at the IHS recounted that when the state legislature recently proposed cutting the line item that supported their operations, a vigorous protest campaign by member organizations to their local legislators was rewarded by having their funds reinstated in the budget. In contrast, PHMC was unable to effectively rally their supporters to the Pennsylvania assembly, and their department took the *single largest* reduction of any agency in the state.

In addition to state historical societies, there are numerous other organizations around the country that support small to mid-sized historical groups, some of which are more comparable in size to HSP. As mentioned previously, the Heinz History Center in Pittsburgh offers an Affiliates Program that supports 125 small to mid-size historical organizations in Southwestern Pennsylvania. A membership-based program with a nominal fee (\$50 per organization), Heinz Center Affiliate benefits include access to the History Center's staff, workshops and programs, publications, a network directory, limited marketing, and free and discounted admissions to various local institutions. Similarly, the Connecticut League of History Organizations (CLHO) is an organization that supports 112 small to medium-sized history organizations throughout Connecticut. The CLHO offers resources, professional training, and networking to museums and history organizations. In addition to an annual conference, the organization offers a professional basics series; museum primer program; and an "Out and About" program, giving professionals a chance to do professional development; as well as a series of "Connecting to Collections" workshops. Membership in the Heritage League of Greater Kansas City, whose geographic reach is comparable to the greater Philadelphia region, provides over 80 organizations with an annual collections-care workshop, ongoing professional development opportunities to visit and experience other sites, networking opportunities and a regional history map that is both a directory and marketing tool for organizations.

Though there is variation in the programs and services offered by organizations supporting local historical groups, two factors are common to all of them: they operate on some version of a membership model, and none of them have found a way to make their activities self-supporting. In fact two organizations—the Heinz History Center and CLHO recorded deficits in the last IRS 990 income tax statements.<sup>6</sup> As Liz Shapiro, the Interim Director of the CLHO said, "Our members just don't have the money."

The CLHO obtains up to five grants a year totaling about \$45,000. These monies in combination with \$13,500 in membership dues and \$10,000 in workshop registration fees do not quite cover the costs their programs. Most of CLHO grants are program/project-based grants from the

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<sup>6</sup> The Heinz History Center in 2009 recorded revenues of \$7.6 million and expenses of \$8.9 million. This drop in income was largely due to cut government subsidies, and left them with a \$1.3 million deficit. The Connecticut League of History Organizations in 2009 recorded revenues of \$69,000 and expenses of \$75,000 leaving them with a \$6,000 deficit. Curiously the Heritage League of Greater Kansas City's last registered a 990 tax statement form in 1997. In that year they had revenues of \$84,000 and expenses of \$80,000.



Connecticut Humanities Council. Organizations pay both an annual fee of \$35 and additional registrations fees for programs that are never more than \$35, with members getting a \$10 discount. The Heritage League of Greater Kansas City supports its efforts with a combination of membership dues set at \$45, donations and underwriting. The Heinz History Center, as mentioned previously, requires a \$50 membership fee that only covers 8% of the total operating costs of the program.

## **Regional Discipline-Specific Umbrella Organizations**

Research also focused on several Philadelphia-based discipline-specific umbrella organizations to determine what functions these organizations serve and what successful discipline-specific initiatives, ideas, or lessons might be adapted for the History Affiliates program.

The Theatre Alliance of Greater Philadelphia, for example, which is a membership-based organization with a budget just under one million dollars has 134 organizational members and 350 individual members. It functions in four principal ways to support the Philadelphia theater community: (1) as an aggregator of pooled resources, (2) as a convener that gathers organizations to network and share ideas, (3) as an advocate to help the sector gain greater recognition and visibility, and (4) as an umbrella marketer to assist small organizations in gaining access to a level of marketing that would otherwise be unavailable to them.

In interviews, Margie Salvante, the Executive Director of the Theatre Alliance, revealed that no single program or service meets the needs of all her constituents, and as a result the Theatre Alliance has to differentiate members' needs and carefully tailor the range of programs they offer. Because the primary way in which members choose to participate in the organization is online, Ms. Salvante also spoke to the importance of a well-developed website, and collaborating closely with the Greater Philadelphia Cultural Alliance (GPCA) around a shared advocacy agenda. She further suggested that the history community may benefit from the Theatre Alliance's experience with creative marketing initiatives that have increased the capacity of theaters, despite the fact that a high percentage (68%) of history organizations do not charge admission. Ms. Salvante advocated for the value of charging a membership fee for no other reason than keeping membership statistics makes it much easier to maintain accurate information about the community.

Dance/USA Philadelphia is another local support agency that provides advocacy, resources, services, and collaborative opportunities for the dance community of the greater Philadelphia region. But unlike the Theatre Alliance, it is *not* membership based. Founded in 2007 as a branch office of Dance/USA the national service organization for professional dance, Dance/USA Philadelphia effectively functions as a stand-alone organization with an annual budget of \$430,000. Though it does not have a membership base, Dance/USA Philadelphia serves 148 dance organizations. It performs three primary functions: (1) as a testing ground for new cultural

models, (2) as an aggregator of web-based resources, and (3) as a provider of one-on-one consultations for dance groups that focus on creating programs and problem solving. The organization takes pride in measuring the needs of its membership, and developing and testing new cultural models in response to these needs. For example, its New Stages for Dance Program (formerly the Theater Rental Subsidy Program), subsidizes facility rentals, encourages collaborations among companies, and leverages joint marketing initiatives, in order to expand the availability of affordable rehearsal and performance spaces and increase income for its constituents. Its example is serving as a model to other cities, including Chicago. While this specific program does not transfer exactly to history organizations, the principle of assessing needs in the community and developing new cultural models/programs to meet those needs does.

The leaders of these two discipline-specific membership organizations stressed the importance of building a strong network that both gets and gives information, and not duplicating services that are already being offered by other organizations. As evidence, Lois Welk, the Director of Dance/USA Philadelphia, said that her organization had made a strategic decision *not* to provide professional development services because so many other organizations already do so. The only exception to this rule is one workshop that is not offered by any other organization in the dance community.

## Surveys

Based on the results of the short survey that was distributed at the “Creating Connections” conference, conversations with the advisory board, and ongoing needs assessment with organizations, an electronic survey was developed and sent to approximately 336 representatives of history organizations on November 29, 2010, followed by a reminder on December 13, 2010. The brief, ten-question survey was designed to get a sense of the specific programs and services that organizations are interested in as well as how much they might be willing to pay for these programs and services [Appendix Items I & J].

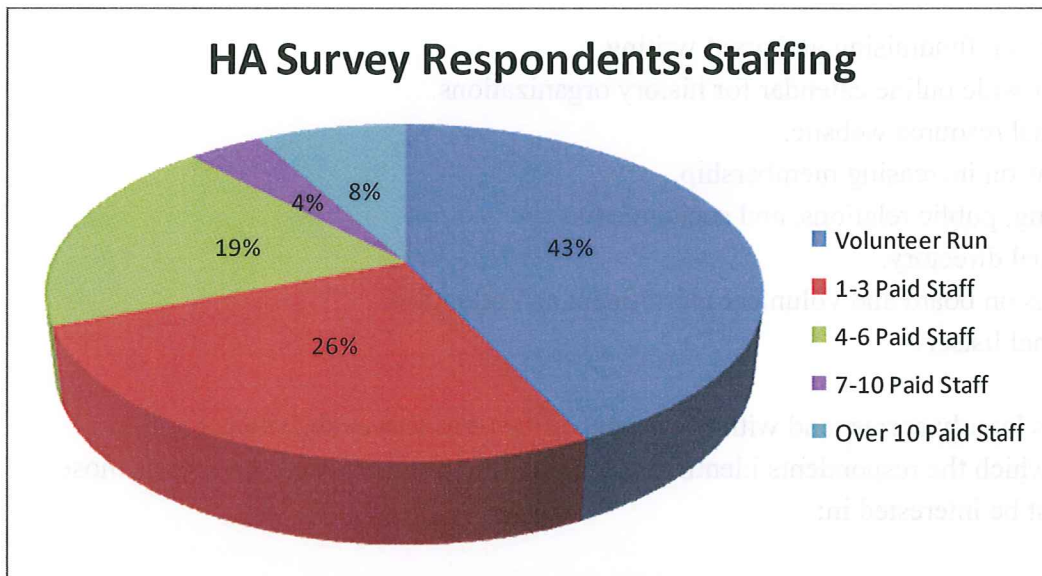
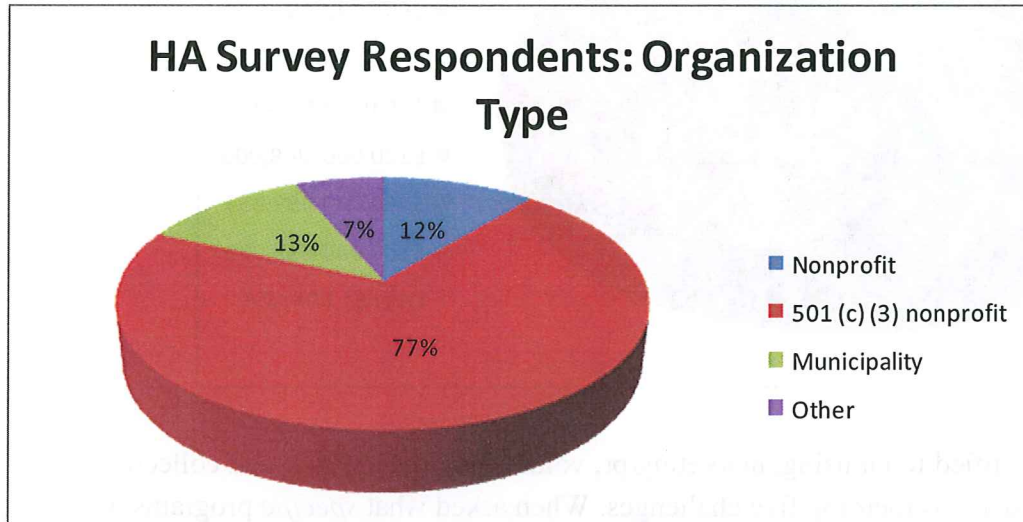
The online survey had a strong response rate of 30%, with 100 representatives of history organizations completing the questions. The majority of the respondents (77%) were 501(c)(3) nonprofits, with a few municipalities represented as well. Not surprisingly, entirely volunteer-run organizations represented the largest group of respondents at 43%. This factor was something that Calista Clearly had become increasingly aware of during her research period. In Delaware County, for instance, there are a total of 80 history organizations, with only 18 of them employing professional staff, while the rest (78%) are volunteer run.<sup>7</sup> Volunteer-run organizations are typically managed by people who often have other full-time jobs, and they have little or no experience in leading non-profit organizations and/or fundraising. Sixty-nine or over two-thirds of the organizations responding had three or fewer staff members, while the

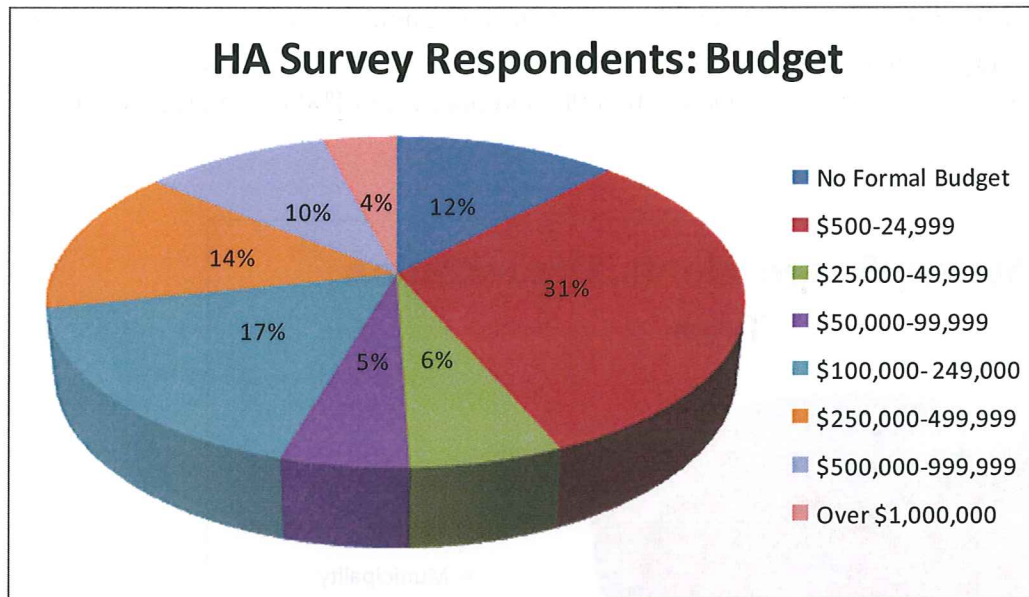
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<sup>7</sup> Harris, Donna. “Public History Feasibility Study & Implementation Plan.” Power Point Presentation to Delaware County Historic Preservation Network, Media, PA. 21 May 2010.



majority of this sub-group, 43%, operates with no paid staff. Organizations clustered around two annual operating budget ranges: \$500 – \$24,999 and \$100,000 – \$249,000. Fourteen (14%) of the organizations had budgets that exceeded \$500,000, and only four (4%) had budgets over \$1,000,000.





Organizations identified fundraising, marketing/pr, volunteers, membership and collections care issues—in that order—as their top five challenges. When asked what *specific* programs or services they wanted, organizations prioritized:

1. Programs on fundraising and grant writing.
2. A region-wide online calendar for history organizations.
3. A regional resource website.
4. Programs on increasing membership.
5. Marketing, public relations, and social media.
6. A regional directory.
7. Programs on board and volunteer recruitment and retention.
8. A regional listserv.

These responses largely correspond with the results of the prior survey distributed at the conference, in which the respondents identified the following programs and services as those they would most be interested in:

1. Programs on marketing, public relations and social media.
2. A five-county listserv for historical organizations.
3. A region-wide calendar for history events.
4. An online directory of history organizations.
5. Programs on fundraising, including endowment development.

Question #6 asked which programs and services organizations would be willing to pay for. This question saw a dramatic 57% drop in the number of responses. Clearly, while organizations are



interested in a host of programs and services, they are not necessarily willing and/or able to pay for them.

In Question #7, 55% of respondents indicated they would prefer a set fee for each History Affiliates event, versus 43% who indicated that they prefer to pay a flat membership fee for the overall benefits of a History Affiliates program. If a History Affiliates program provided a regional directory, a listserv, a monthly newsletter, a resource website and reduced rates for workshops, more than half thought that membership fees ranging from between \$35 to \$175 annually was “fair” to “very reasonable”. In response to a range of suggested fees, over 50% of organizations indicated they would be “quite likely” to participate, while an additional 27% identified themselves as “likely” to participate. That indicates that 77 organizations would be either “likely” or “quite likely” to join an Affiliates program with the proposed benefits. This response suggests that overall respondents perceived considerable value in the benefits that are focused on communication.

### **The Issue of Membership**

Leading up to this study HSP had assumed that it could *not* charge a membership fee because with multiple other support organizations to choose from (GPCA, Preservation Alliance, PACSCL, Arts & Business, etc.) organizations would not join, and/or the other service organizations would not appreciate the additional competition for membership dollars. As the online survey showed, however, neither assumption is true. Over 50 organizations said they would be “fairly likely” or “very likely” to pay a membership fee, while an additional 27 organizations indicated that they would be “likely” to join. Moreover, none of the above organizations are currently providing the type of discipline-specific services that would be available through a History Affiliates program at HSP.

“Membership” as explained in the survey would entitle organizations to be listed in a History Affiliates directory and post events to a master calendar on the History Affiliates portion of the HSP website. In addition, Affiliate members would receive discounts on twice-yearly programs presented by HSP, as well as discounts to programs at their respective member rate. At first, the barrier to participation should be low, particularly for the smaller organizations. The surveyed annual membership fees were tied to annual budget:

- under \$50,000, \$35;
- under \$100,000, \$75;
- under \$500,000, \$125;
- under \$1,000,000, \$150;
- over \$1,000,000, \$175.

Based on survey results, it is realistic to predict that a minimum of 50 organizations would be willing to pay to become Affiliates netting a modest \$2,500 – 3,000 received in the first year. The question, of course, is whether it is worth HSP time and effort to collect membership fees.

At the “Creating Connections” Conference, Andrew Masich from the Heinz History Center recommended levying a membership fee believing that organizations “valued what they pay for.” However, he did acknowledge that there was significantly less “competition” for membership dollars with fewer support organizations in Pittsburgh as compared to Philadelphia. Discussions with the Greater Philadelphia Cultural Alliance have centered on offering a membership program whereby small history and heritage organizations would be both a member of HSP and GPCA at a discounted rate.

Other service organizations derive a portion of their revenues from membership fees, but upon closer analysis these fees account for only a small amount of their annual budget. The Conservation Center (CCAHA), for example, derives less than 0.7% from membership (FY 2009); the Preservation Alliance derives 7% (FY2008); the Theatre Alliance of Greater Philadelphia derives 9% (FY2009); and the Cultural Alliance (GPCA) derives around 13% from membership fees (FY2010). If HSP decided to charge a membership fee for the Affiliates it can be expected in the first year to cover around 4% of the total expenses.

The value of membership for these service organizations however, is not primarily financial. Membership allows for much easier gathering of information about constituent organizations and requires organizations to “put some skin in the game” by placing a value on services and demonstrating their financial commitment to a cause. From the organizations’ end, becoming a member allows them to become part of a larger interest-driven community.

### **Fee for Service**

As previously mentioned, only a small portion of the expenses needed to sustain a History Affiliates program can be raised through membership fees. Another possibility is to charge for individual programs and services, and provide a menu of options for organizations to choose from. However, as programs in Minnesota and Connecticut demonstrated, a fee-for-service model has not proved viable because small organizations with limited budgets would rather pay once than face the uncertainty of not knowing what costs they will incur throughout the year.

The online survey confirmed that half of the organizations would be slightly more interested in paying for events, but in general, they were less willing to allocate money for programs and services than an annual membership fee. It is Calista’s opinion that survey respondents were “playing it safe” because they were not quite sure what benefits would be attached to membership. Therefore, the issue of charging a fee-for-service comes down to the basic “value proposition” presented. Services that offer “advice” such as board training, collections care, and



“how-to-workshops,” are less attractive because organizations at the end-of-the-day still have the costs of implementing the programs they studied to deal with. But if the services deliver quantifiable cost savings, such as increased membership, securing a grant, or gaining design services organizations are more willing to pay.

The amount of revenues that service organizations derive from workshop fees and fee-for service contracts varies widely. The Conservation Center (CCAHA), for example, derived less than 2% in workshops fees but an amazing 82% in conservation treatments contracts in 2009; the Preservation Alliance derived 23% from service contracts in 2008; and the Theatre Alliance of Greater Philadelphia derived 47% in service contracts and program fees in 2009. The services offered, however, were either very specialized or could not be replicated elsewhere (such as conservation of artifacts, or delivering a specialized theatre booking software).

A conundrum obviously exists for HSP if it decided to provide specialized services because of the significant staff costs involved. The most successful approach to this issue in recent years has been a *shared solution* as demonstrated by the fifteen-member Historic Germantown Preserved consortium that divides the cost of key personnel and coordinates activities across organizations. Another example can be found at Culture Works whose Enterprise Platform charges organizations with annual budgets of less than \$250,000 an annual fee to run the back-office operations. Their program is viable only because of economies of scale.

The question of what specialized services HSP could develop that are not duplicated and are in its area of specialty (archival processing, special collections care, historical research), has been considered. Below are a number of past, present, and future ideas:

- There had been serious discussion about ten years ago about HSP and the Conservation Center (CCAHA) partnering to offer archival storage for paper-based collections, but it was recognized that although there was a need within the sector for these types of services this would take a substantial financial/capital investment by both organizations.
- Renting office spaces for organizations either in the short term or long term is something that HSP has done in the past and is exploring as part of its capital expansion plans.<sup>8</sup>
- Also underway, in partnership with Night Kitchen Interactive, is the idea to provide the software platform of the PhilaPlace community history website to other organizations for a fee. Night Kitchen and HSP are giving a joint lecture on the idea of “AnyPlace” at the Museums and the Web Conference to be held in Philadelphia this May.
- A grant has just been submitted to the Mellon Foundation to help support a survey of small archival repositories in the Greater Philadelphia region. If successful, this initiative

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<sup>8</sup> HSP has in fact rented office space in the past to the genealogical Society of Pennsylvania and the Civil War History Consortium.

could lead to the development of archival standards, protocols, database software, archival processing and basic conservation services.

- In the spring of 2011 HSP will be hosting a CCAHA Collections Care Workshop and a State Archives Archival Basics Workshop, both of particular interest to prospective History Affiliates.

## **Taking a Systems Approach**

What this report, and the research behind it indicates, is that developing a sustainable approach to supporting the history and heritage sector is extremely complex. This fact was recognized by the Technical Development Corporation (TDC) in 2009 when they called for a *history system* between history organizations, support organizations, and the media.<sup>9</sup> By taking a more expansive view of sustainability that relies on building a “collective American memory” led by entities who share a mission to collect and share the history of the United States (libraries, museums, tourism agencies, places of higher education, publishers, the entertainment industry, community developers, preservationists, and the media), TDC asks history organizations to re-engineer themselves by becoming more responsive to contemporary events. In TDC’s view by placing history in context, organizations can improve their “value” in the wider community and share the responsibility for historical understanding.

The recommendations of the TDC report go beyond the focus of this report of sustaining operations by questioning the programming of small history and heritage organizations. Nevertheless, the fundamental issue of creating public “value” by working as part of a wider system of organizations is close to the ideals of HSP’s History Affiliates program. TDC is developing a follow-up report that will focus on organizations based in the Northeast and Mid-Atlantic that will conceive, articulate, and evaluate potentially sustainable solutions based on a systematic framework. HSP will be part of this study and closely study their recommendations.

## **Summary of Findings**

There is consensus amongst both the service organizations in Philadelphia, regional umbrella organizations, and the small history and heritage organizations themselves, that HSP can play a valuable role in aggregating and distributing information about support services and programs that already exist in the Greater Philadelphia region; act as a local “mentor” brokering programs between organizations; and centralize all information about the history sector. Furthermore organizations saw value in HSP providing a unified “voice” on behalf of the history and heritage sector at the state and local level, and working with other regions across the commonwealth

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<sup>9</sup> Technical Development Corporation, Inc., *Building a Sustainable Future for History Institutions: A Systemic Approach*, (Boston: 2009). [www.tdcorp.org](http://www.tdcorp.org)

(most notably Pittsburgh and Harrisburg ) to affect a unified approach in terms of policy development, education, and heritage tourism initiatives.

Although the majority of the history and heritage organizations surveyed are registered nonprofit entities many have no paid staff and one-third have annual budgets of less than \$25,000. By their actions they have demonstrated that they would actively participate in electronic forms of communications such as a monthly e-newsletter, listservs, and directories, and personally attend workshops and conferences. Furthermore they would prefer to pay a modest annual membership fee to be part of a larger community, rather than pay on an individual basis for programs and services. As demonstrated by the survey results, the single largest issue of immediate concern is fundraising, followed by how organizations can market themselves and attract new audiences. The third largest concern is having access to resources—particularly in the area of fundraising. All organizations valued developing a stronger peer-to-peer communication network to encourage resource sharing and facilitate joint programming.

## **Defining Affiliate Organizations**

While a number of advisors suggested that organizations “value what they pay for,” HSP believes that the primary value of the Affiliates program is to act as a convener of information to *ALL* the history and heritage organizations in the Greater Philadelphia region. To that end, removing any barriers to inclusion and providing incentives to become actively engaged is the foundation of a two-phased program.

With the goal of the Affiliate program being as inclusive as possible, organizations:

### Do NOT have to:

- Be a registered non-profit entity, but they cannot be for-profit company. (For profit-organizations can become HSP organizational members)
- Employ staff
- Hold programs for the public.

### Affiliates DO have to:

- Support either the care of historical collections or assets (i.e. an historic site) OR/
- Engage in activities that support historical research and education.
- Have a formal organizational charter and/or mission statement
- Designate a main contact person.
- Be in contact via email and have access to the internet.



## Membership

It is recommended to establish a 3-tiered membership program as follows:

### Affiliate Basic

A FREE membership with access to a host of *online* resources. These resources would only be accessible through a password-protected portal on HSP's website, designed in order to capture organizations' updated contact information and track usage. Online resources would include:

- A regional directory with addresses, contact names, etc.
- A master calendar of public and internal organizational events to avoid conflicting dates.
- Lists of local, regional, and federal resources.
- List of grant and funding opportunities.
- Online library of new literature, interesting articles, news-in-the field, etc.
- List of HSP staff resources / advisors / services.
- Invitation to join social media (chat room, blog, listserv and/or Facebook ) to encourage idea-sharing.
- Monthly e-newsletter.

Responding to the advice that paying a membership fee drives the harvesting of accurate information, Affiliate Basic members will only be granted a password to online resources if they provide updated contact and organizational information.

### Affiliate Partner

This is only available for organizations with annual operating budgets of less than \$500,000, which accounts for 96% of the surveyed organizations who were willing to pay a membership fee. The two levels were determined in consultation with the Advisory Board and supported by the December survey.

	Membership Fee
A. Annual Budget under \$100,000	\$75.00
B. Annual Budget between \$100,000 - \$500,000	\$125.00

Benefits include all the online services listed in the BASIC category, plus:

- Two free workshops / Affiliate meetings a year
- Discount to workshops given by HSP and other support organizations (CCAHA, GPCA, Preservation Alliance, etc.)
- 30% discount on Greater Philadelphia Cultural Alliance (GPCA) membership

- Free passes to HSP's Reading Room for pre-designated staff (A= 20 passes / B = 50 passes)
- 10% discount on all items in HSP's online store

### **Affiliate Client**

Affiliates would have access to a menu of discounted client programs and services offered by HSP. In Phase I they would include:

<b>Service / program</b>	<b>Annual Fee</b>	<b>Hourly Rate</b>	
Mail-holding service	\$100.00		Includes forwarding-on mail each week
Facility rental 2nd Floor conference room		\$200.00	Includes coffee/tea service, set up and break down
Facility Rental 1st floor conference room		\$400.00	Includes coffee/tea service, set up and break down
Facility Rental Document show-and-tell		\$200.00	Includes coffee/tea service, set up and break down
Research by Mail - up to one hour		\$30.00	
Research by mail - each additional hour		\$25.00	
Research by mail - rush service per hour		\$75.00	
Archival collections needs assessment		\$35.00	Travel time and supplies additional
Archival collections basic processing		\$60.00	Travel time and supplies additional. Available on or off site.
Basic archival conservation workshop		\$125.00	Two-hour minimum

### **Phase I: Implementation**

As indicated above HSP's primary goal is to aggregate information about and for the history and heritage community. In order to do so, HSP believes it needs to make the program affordable and accessible to a wide range of organizations. Therefore it recommends establishing the three tiered membership program referenced above: (a) Free online access (Affiliates Basic) to ALL organizations, (b) a modest membership fee for organizations with budgets of below \$500,000 (Affiliates Partners), and (c) a limited menu of fee-based programs and services (Affiliates Clients), that can be expanded in Phase II.

HSP believes it will take 18 to 24 months to implement Phase I with the assistance of a director of the program working between 30 to 40 hours (40 hours is full-time at HSP) per week.

The focus for this position will be to:



- Build a password-protected History-Affiliates portal of HSP's new website that will launch in the fall of 2011. The portal would include: a regional directory with addresses, contact names, etc; lists of local, regional, and federal resources; grant and funding opportunities; a library of new literature, interesting articles, news-in-the field, etc.; summaries of conferences and seminars attended by HSP staff and Affiliate members; and, a list of HSP staff resources / advisors / services.
- Establish a public online calendar that aggregates events being offered around the region.
- Continue to send a monthly e-newsletter with timely information on resources, grant deadlines, and issues in the field.
- Hold two free professional development workshops (one outside Center City Philadelphia)
- Coordinate with other support organizations on discounted programming opportunities.
- Coordinate with press and media organizations to promote History Affiliate activities.
- Establish a Facebook page as an online networking component.

### **Advisory Board**

It is recommended to retain and supplement if necessary the current Advisory Board structure (12 members) and continue meeting at least four times a year.

### **Mentoring Pilot Project: StEPs**

HSP also proposes piloting a "mentoring" project whereby the Affiliates Director would work closely with four to six organizations to do an organizational needs assessment and suggest programs and services managed either by HSP or other support organizations in Greater Philadelphia to help them achieve their goals. The program would tie-into the new Standards and Excellence Program for History Organizations (StEPs) created by the American Association of State and Local History (AASLH) with funding from the Institute of Museum and Library Services in 2010.

StEPs is a fast-paced voluntary assessment program largely delivered online and reliant on a lot of self-study. HSP proposes supplementing the StEPs assessment questions and performance indicators (basic, good, better) that rate an organization's performance in six areas: Mission, Vision and Governance; Audience; Interpretation; Stewardship of Collections; Stewardship of Historic Structures and Landscapes; and Management. The program is designed to serve as a map to improve awareness and achievement of national standards. The StEPs Program has a \$250.00 participation fee (\$150 for non AASLH members) which organizations in the pilot program would be asked to pay as a way of showing their commitment to the program.

### **Recognition Luncheon**

HSP further proposes instituting an annual luncheon each October to recognize milestones and recognize excellence amongst the history and heritage community of Greater Philadelphia. While

the Preservation Alliance for Greater Philadelphia holds a very successful luncheon for over 500 each year, their focus is on rewarding historic preservation activities. Likewise, while the Arts and Business Council holds a luncheon for over 1,000 to celebrate programs between the business community and the Arts, as the name suggests, history is totally excluded.

In the first year the Advisory Board would develop the award criteria and nominate the awardees. The goal is to create a more robust peer-group within the history and heritage sector focused on best practice. It is envisioned that in Phase I the Affiliate Director would need the additional help of a part-time coordinator (20 hour a week) for three months leading up to the event to manage the catering, advertising / media , sponsors, and guest speakers. Ideally, the costs of the event in the future would be sub-vented through sponsorships, and a goal for the future would be to use the luncheon as means to raise funds to help support the costs of managing the Affiliates program each year.

## **Phase II: A Catalyst for Strategic Change**

The direction and scope of a second phase of the History Affiliates program would in large part depend on the outcomes of the first phase and available funding. Ultimately, while it makes sense from HSP's perspective to establish a clear and limited focus for a History Affiliates Program at the outset, simply providing communication, aggregated online resources and networking opportunities is not be enough to fundamentally change the way the history and heritage sector sustains itself. The larger goal has to be to build capacity within the history sector and provide ways in which to rationalize its future direction. The more important question is: ***How can a strong Affiliate network – established in Phase I – become a catalyst for strategic change within the region?***

While it is somewhat premature to design Phase II, it is envisioned that the following elements would be included:

1. **Maintain the 3-tier membership, but add more fee-based programs and services to the Client category** as HSP further develops its strategic plan. For example, HSP is planning a renovation and expansion of its building and plans include creating temporary offices that can be rented to outside organizations. Similarly, as more collection storage is built, HSP may be in the position to help facilitate paper-based collection storage. Finally, just nearing its pilot phase, the Digital Center for Americana (DCA) has received requests to digitize collection materials of other organizations, a service that could be added to the menu.
2. **Maintain and grow the online communication tools, expanding to offering online Webinars and co-produced program materials** (see below).



3. **Continue to offer two free workshop and/or professional development meetings a year. A second phase may include videoing these sessions and making them available to view remotely.**
4. **Continue to offer discounted workshops, programs and services offered by other support organizations in the Greater Philadelphia area, and further explore how the Affiliates program could take on a systems approach as discussed by the TDC report.** For example, additional programs may involve local colleges and universities such as the University of the Arts who have had initial conversations with HSP to develop a continuing education certificate course in historic site interpretation for volunteers.
5. **Depending on the success of the pilot mentoring program, expand the number of organizations undertaking the StEPs / Affiliates mentoring program.**

#### **ADDITIONAL:**

6. Develop a robust education advisory board that coordinates with the Philadelphia School District and local Intermediate Education Units.
7. Serve as a testing ground for developing new program models that both creatively address the pressing needs of history organizations and foster collaboration within the community. Similar to what is being undertaken at Dance/USA Philadelphia with the New Stages for Dance Program, the History Affiliates program would begin to look at developing creative programs that emphasize collaboration to address pressing challenges.
8. Initiate a re-granting program whose funds are dedicated to supporting resource-sharing and conjoined activities and initiatives between one or more organizations. Funds for example, may support a shared marketing manager, a combine board training session, or complimentary exhibition schedule.

### **Funding**

The research in this report has made it clear that in this economic climate, an Affiliates program is not going to completely sustain itself financially. Examples, both local and national, of like-minded initiatives have shown that without major support from government or foundations the resources needed to continue developing a centralized network will soon disappear. The Tri-State Coalition of Historic Places, which represents 25 historic sites and has an annual budget of

\$1,000, is a sobering example of how difficult it is to maintain momentum simply on volunteer labor, no matter how enthusiastic.

The assumptions entering this pilot phase by HSP in terms of funding were three fold:

1. Organizations would not pay to become members
2. The program would be sustained through fee-based programs and services
3. Because the Affiliates program would be embedded within a large, fiscally-stable organization such as HSP, it would have a better survival rate.

Each of these assumptions has been challenged by our research. Firstly, we now know that the majority of organizations are prepared to pay a modest annual membership fee. However, if we were to make a conservative estimate that fifty organizations would join at the \$75 level and another ten at the \$125 level, this would equate to around \$5,000 of revenue. Whilst still recognizing that the membership fees will not cover the costs of administering the program, HSP does believe that it good practice to expect organizations to demonstrate their commitment in this way.

Secondly, while it seems to make sense for HSP to develop a menu of fee-based archival services, regional history organizations expressed little interest in availing themselves of these services. In the online survey, organizations rated several types of archival services as those they would be *least* inclined to take advantage of. In the few areas of relative interest such as archival management and digitization, several organizations including CCAHA, the Pennsylvania State Archives, and the Drexel University Archives already offer programs locally, and it makes more sense for HSP to help broker the use of these programs than to manage them itself. The issue of perceived value comes into play here, as does the concept of HSP taking a systems approach that leverages on the already present programs, services, skills, advice, time, and efforts of a wide range of support organizations. Until HSP is able to provide services that either save staff time and/or money, organizations are most likely going to be unable to spend money on what they see as “ancillary” activities that do not help them balance the bottom line.

Finally, the assumption that HSP’s ability to absorb a certain amount of the costs of managing an Affiliates program has been proven based on the experiences of other organizations who have partnered with HSP such as the Encyclopedia of Greater Philadelphia and the Civil War History Consortium. The conservative estimate of absorbing utility costs (heating, lighting, telephone, internet etc.) and sharing operational overheads (financial management, human resources, cleaning etc.) is around 30 – 45%. However, the real benefits come from the daily interaction with HSP staff and its constituents. Throughout her consultancy, for example, Calista Cleary worked closely with marketing and communications, library and archives, and managerial staff; attended all-staff and strategic planning meetings, and worked in the history community as a representative of HSP. It is HSP’s belief that by becoming the lead anchor for the History



Affiliates program, the sector as a whole has a better opportunity not just to survive financial hardship, but thrive through sharing the knowledge and skills of its employees and partners.

## Conclusion

Developing a History Affiliates Program presents a significant opportunity for HSP to provide leadership in the regional history community and broaden its identity from an archive and research library to a Center of History and Learning. With that same opportunity, however, comes significant challenges including: how to sustain the program; how to create connections and foster collaboration amongst historically independent, even territorial organizations; how to work with organizational leaders who often have little non-profit management experience; and how to strategically strengthen the entire sector in the long-term.

The sheer number of organizations—a possible 320—is also a daunting prospect, and if successful, would make the Affiliates one of the largest non-profit culture consortiums in the region. With this size, however also come tremendous opportunities to collaborate on education initiatives, heritage tourism, messaging, and advocacy.

Developing a first-phase History Affiliates Program focused on communication and aggregation of resources makes a lot of sense. It provides a firm foundation for the history sector to communicate better amongst itself, support prioritized needs, and develop a strategy for the future—one that should include sharing resources, downsizing, and building upon shared strengths. Finally, it allows a central point of access to the history community to other service organizations and funding agencies. A second phase concentrating more on taking a systems approach to capacity building, will only be possible after developing a strong network based on trust and mutual benefit. In the long-term the success of the History Affiliates program will depend on whether the material and physical culture of the Philadelphia region is not only preserved but serves as a driver for educational and economic growth for the next generation.

## Appendices

- A. List of Regional Service Organizations
- B. History Affiliates Advisory Board List
- C. History Affiliates Introductory Electronic Letter
- D. September History Affiliates Newsletter
- E. February History Affiliates Newsletter
- F. “Creating Connections” Conference Postcard
- G. Collated Results of Breakout Group Discussions at Conference
- H. Collated Results of Paper Survey Distributed at Conference
- I. History Affiliates Online Survey
- J. Overall Results of History Affiliates Online Survey
- K. History Affiliates Actual Grant Budget



## APPENDIX A

### List of Regional Service Organizations

- **Arts & Business Council of Greater Philadelphia**  
200 South Broad Street, Suite 700  
Philadelphia, PA 19102-3896  
215-790-3888
- **Civil War History Consortium**  
c/o The Union League of Philadelphia  
140 South Broad Street  
Philadelphia, PA 19107  
215-985-1445
- **Conservation Center for Art & Historic Artifacts**  
264 South 23<sup>rd</sup> Street  
Philadelphia, PA 19103  
215-545-0613
- **CultureWorks Greater Philadelphia**  
267-597-3803
- **Free Library of Philadelphia**  
1901 Vine Street  
Philadelphia, PA 19103  
215-686-5322
- **Historic Germantown Preserved**  
c/o Cliveden of the National Trust  
6401 Germantown Avenue  
Philadelphia, PA 19144  
215-848-1777
- **Governor's Southeast Regional Office**  
200 South Broad Street, 11th Floor  
Philadelphia, PA 19102  
215-560-2640
- **Greater Philadelphia Cultural Alliance**  
1616 Walnut Street, Suite 600  
Philadelphia, PA 19103  
215-557-7811
- **Greater Philadelphia Tourism and Marketing Corporation**  
30 S. 17th Street, Suite 1710  
Philadelphia, PA 19103  
215-599-0776

- **Philadelphia Area Consortium of Special Collections Libraries**

P. O. Box 22642  
Philadelphia, PA 19110-2642  
215-985-1445

- **Office of Arts and Culture and the Creative Economy**

City Hall Room 708  
Philadelphia, PA 19107  
215-686-8446

- **Penn Praxis**

409 Duhring Wing  
School of Design  
University of Pennsylvania  
Philadelphia, PA 19104-6311  
215-573-8719

- **Pennsylvania Historical and Museum Commission**

State Museum Building  
300 North Street  
Harrisburg, PA 17120  
717-787-3362

- **Pennsylvania Humanities Council**

Constitution Place  
325 Chestnut Street, Suite 715  
Philadelphia, PA 19106-2607  
215-925-1005

- **Preservation Alliance for Greater Philadelphia**

1616 Walnut Street, Suite 1620  
Philadelphia, PA 19103  
215-546-1146

- **Remer & Talbott**

484-278-1812



## **APPENDIX B**

### **History Affiliates Advisory Board**

Erica Armour, Executive Director  
Historic Fallsington, Bucks County

Laura Beardsley, Executive Director  
Germantown Historical Society, Philadelphia County

Pattye Benson, President  
Tredyffrin Historic Preservation Trust, Chester County

Anne Burnett, Consultant  
Historic Germantown, Philadelphia County

John Costello, Executive Director  
Delaware County Historical Society, Delaware County

Melissa Jest, Neighborhood Preservation Program Coordinator  
Preservation Alliance for Greater Philadelphia, Philadelphia County

Bruce Knapp, President  
Paoli Battlefield Preservation Trust, Chester County

David Luz, Executive Director  
Schwenkfelder Library & Heritage Center, Montgomery County

Tony Shahan, Executive Director  
Newlin Grist Mill, Delaware County

R. Scott Stephenson, Director of Collections & Interpretation  
American Revolution Center, Philadelphia County

Theresa Stuhlman, Preservation & Development Administrator  
Philadelphia Parks & Recreation, Philadelphia County

Beth Twiss-Houting, Director of Education\*  
Chester County Historical Society, Chester County

\*Has joined HSP staff since formation of Advisory Board

## APPENDIX C

### History Affiliates Introductory Electronic Letter

Dear [Name],

I am pleased to welcome you to the History Society of Pennsylvania. We are a non-profit organization dedicated to the study and preservation of Pennsylvania's history. Our mission is to promote historical research, education, and public programs that foster a deeper understanding of our state's past.

The Society's primary focus is on the history of Pennsylvania, from its early settlement to the present day. We offer a wide range of programs, including lectures, seminars, and field trips, designed to engage members and the public in the study of history. Our members enjoy access to a variety of resources, including our extensive library and archival collections.

We are currently planning a series of events for the upcoming season, and we would like to invite you to participate. Please contact us at [Phone Number] or [Email Address] for more information. We look forward to seeing you at one of our events.

Sincerely,

Kim S. [Name]

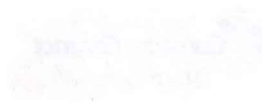
President & CEO of the Historical Society of Pennsylvania

History Affiliates

For more information, please contact [Name] at [Phone Number] or [Email Address].

Kim S. [Name]

President & CEO of the Historical Society of Pennsylvania







Dear Lauri,

The Historical Society of Pennsylvania is pleased to announce the creation of a **History Affiliates** program designed to support history and heritage organizations in Southeastern Pennsylvania. Currently in its planning stage, this new program will initially provide a network for your organization to better communicate with peer organizations in the region through an e-newsletter. When the full program is rolled out in early 2011, it will offer additional services to encourage institutional collaboration and capacity building. Recognizing that the Southeastern Pennsylvania history and heritage community is a large and diffuse group, we believe that through History Affiliates we can better communicate and work together to strengthen our respective organizations, as well as the Greater Philadelphia history community.

Over the next nine months, the Historical Society of Pennsylvania will embark on a planning phase, designed to assess organizational needs and determine the shape of the program. The Historical Society has hired Calista Cleary, who has a background in American history and historic preservation, to lead this effort. The planning process has been funded by a grant from The Barra Foundation, Inc.

If you would like to be involved in the planning process or would like more information about the History Affiliates program, please contact Calista at (215) 732-6200 ext. 243 or [ccleary@hsp.org](mailto:ccleary@hsp.org).

Calista will reach out to your organization again in a few months with more information and a formal invitation to join History Affiliates. We look forward to working with you to strengthen our individual institutions and, in turn, the Southeastern Pennsylvania history community.

Sincerely,

Kim Sajet  
President & CEO of the Historical Society of Pennsylvania

[Forward email](#)



This email was sent to [lcielo@hsp.org](mailto:lcielo@hsp.org) by [lcielo@hsp.org](mailto:lcielo@hsp.org) |

## APPENDIX D

### September History Affiliates E-Newsletter

Historic Preservation Commission Assessment Program  
application and materials online and by mail by October 30th. Please

## Grant Opportunities

Attention: our request for the historic assets, the effort to build  
a both the center for this new collection, and the

to serve to find out more information.  
organization with each collection during from 1994-1995, and  
your archives and possibly provide a grant-visit, as well as

including creating electronic records, recording scholarly research  
offering to catalogue unprocessed archival collections, and  
collections of Civil War archival materials, and the state, they are  
website as well as to be a resource for the state and the

Pennsylvania Historical and Museum Commission will create a  
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ABOUT HISTORY  
AFFILIATES

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CHECK YOUR  
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# History Affiliates



*Connecting & Supporting History Organizations*

## CONFERENCES

The Small Museum Association will be hosting its 27th Annual Conference Sunday, February 20 through Tuesday, February 22, 2011 at the Clarion Resort Fontainebleau Hotel, Ocean City, MD. For more information, click [here](#).

Pennsylvania Museums: Rebuilding and Rebounding, the Pennsylvania Federation of Museums and Historical Organizations' Statewide Museum Conference, will take place November 8 and 9, 2010, in Williamsport, PA. For additional information and to register, click [here](#).

On November 11 - 13, 2010, the Mid-Atlantic Regional Archives Conference (MARAC) will be holding its fall meeting in Harrisburg. The meeting will be in lieu of the annual PHMC Archives and Record Management Seminar normally held in Harrisburg at this time of year. The fall program theme is "The Politics of Archives." For further information, click [here](#).

## CHECK YOUR NONPROFIT STATUS

Is your nonprofit one of the 300,000 organizations that is in danger of losing its nonprofit status? Find out [here](#).

## ABOUT HISTORY AFFILIATES

## Register Now for Creating Connections Conference 8:30 AM - 4 PM Monday, October 18 Historical Society of Pennsylvania

Please join us for **Creating Connections**, a conference for history organizations in Southeastern Pennsylvania, cosponsored with the Conservation Center for Art and Historic Artifacts, the Greater Philadelphia Cultural Alliance and the Preservation Alliance for Greater Philadelphia. This event will introduce the History Affiliates Program, which is currently in its planning phase. The conference is also an opportunity for history organizations in Southeastern Pennsylvania to come together to discuss the many shared and pressing challenges confronting us and to consider how the History Affiliates Program might be developed to address some of these challenges.

The morning will feature a nonprofit resources session with an opportunity to talk with representatives of organizations, a chance to network with peer organizations, and a presentation by Andrew Masich, president and CEO of the Senator John Heinz History Center in Pittsburgh. In the afternoon, representatives of the Pennsylvania Homefront Civil War Digital Archives Project will discuss their collections survey and how your organization might participate. The project, which is a collaborative effort of the Richards Civil War Era Center, the Pennsylvania State University Libraries, Senator John Heinz History Center, the Historical Society of Pennsylvania, and the Pennsylvania Historical and Museum Commission, will create a website designed to be a resource station for the vast and diverse collections of Civil War archival material around the state. They are offering to catalogue unprocessed archival collections from 1851-1877, including creating electronic records, facilitating scholarly access to your archives and possibly providing preservation assistance. Any organization with archival collections dating from 1851-1877 is invited to attend to find out more information.

Attendees can register for the morning session, the afternoon session or both. To register for this free conference, click [here](#).

## Grant Opportunities

Heritage Preservation's Conservation Assessment Program applications will be available online and by mail in October 2010. These

There are hundreds of small history and heritage organizations in Southeastern Pennsylvania, and they face many similar challenges--a lack of funding, inadequate marketing resources, and a need to attract more visitors, members, and volunteers. To support these organizations in addressing these challenges, the Historical Society of Pennsylvania recently created the History Affiliates program. Currently in its planning stage and funded by the Barra Foundation, this new program will initially provide a network for organizations to better communicate with their peers in the region. For more information, click [here](#).

-----

#### CONTACT HISTORY AFFILIATES

Historical Society of Pennsylvania  
c/o Calista Cleary  
1300 Locust Street  
Philadelphia, PA 19107  
215-732-6200  
[www.hsp.org](http://www.hsp.org)



Register for Creating Connections Conf...

assessments are available for museums only. A general conservation assessment is a broad study of museum conditions, policies, and procedures that relate to and affect collections care. To be added to the mailing list to receive a paper copy or to find out further information about the program and eligibility see Heritage Preservation's [website](#).

IMLS is accepting grant applications for the agency's 2011 Conservation Project Support program to help museums identify their conservation needs and priorities, and to aid them in the safekeeping of their collections through the implementation of sound conservation practices. The application deadline is October 1, 2010. For further information and an application see IMLS's [website](#).

In August 2010, IMLS awarded \$1,485,000 to 14 organizations committed to preserving and sharing the history of African American life from the period of slavery to the present day as part of the Museum Grants for African American History and Culture program. The next deadline for the Museum Grants for African American History and Culture program is January 18, 2011. For more information about the program, click [here](#).

## Local Fundraising Workshops

The Regional Foundation Center located at the central branch of the Free Library of Philadelphia is offering several free fundraising workshops in the coming months including Foundations 101, Proposal Writing Basics, and Grow Your Major Donor Pipeline Through Prospect Research. For further information and registration, see the RFC's program [calendar](#).

If you would like more information about the History Affiliates Program or would like to be involved in the planning process, please contact Calista Cleary at (215) 732-6200 ext. 243 or [ccleary@hsp.org](mailto:ccleary@hsp.org).

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Historical Society of Pennsylvania | 1300 Locust Street | Philadelphia | PA | 19107





## APPENDIX E

### February History Affiliates E-Newsletter

The February History Affiliates E-Newsletter is now available. This newsletter provides information about the activities of the History Affiliates, including the upcoming annual meeting, the 2015-2016 awards, and the 2015-2016 membership drive. The newsletter also includes information about the History Affiliates' efforts to promote the history of the United States and to support the work of the Historical Society of Pennsylvania.

The History Affiliates are a group of organizations that are dedicated to the study and promotion of the history of the United States. They are organized into regional chapters, and each chapter is responsible for promoting the history of its region. The History Affiliates work together to promote the history of the United States and to support the work of the Historical Society of Pennsylvania.

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# History Affiliates



*Connecting & Supporting History Organizations*

## CONFERENCES

The Small Museum Association will be hosting its 27th Annual Conference Sunday, February 20 - Tuesday, February 22, 2011 at the Clarion Resort Fontainebleau Hotel, Ocean City, MD. For more information, click [here](#).

The theme of the 2011 Annual Conference of the Middle Atlantic American Studies Association will be "Heritage and the State." The conference will take place April 8-9, 2011 in Harrisburg, PA. For further information, click [here](#).

## RESOURCES

The National Trust for Historic Preservation has several 2011 Planning Calendars for Historic Sites available at its Historic Sites Web Site/Blog. To access the calendars, click [here](#).

The National Trust for Historic Preservation has a online toolkit titled "How Cultural Heritage Tourism Organizations Can Beat the Recession." The toolkit contains a searchable database and includes the following three components: 11 evidence-based survival strategies, case studies that illustrate these strategies, and links to other online toolkits for additional information. To access the toolkit, click [here](#).

AASLH is offering two self-paced, online courses on volunteers. "Are You Ready for Volunteers" covers the details of volunteer management and developing effective volunteer-run programs. "Seven Steps to a

## History Affiliates: Next Steps

The planning grant phase of History Affiliates has almost finished. Based on all your input--from surveys, meetings, conversations, and the "Creating Connections" Conference, (thank you!) we are completing a report which will help to clarify next steps and serve as springboard to gain further funding and development support. In the meantime, while HSP is completing this phase of the project you will continue to receive our monthly e-newsletters.

## Grant & Fellowship Opportunities

The **American Association of Museums Curators' Committee** has announced the availability of two fellowships for curators who have never attended an AAM Annual Meeting before and whose major job responsibilities are the care and interpretation of their museums' collections. These two \$1,000 fellowships are intended to help defray the cost of attending the Annual Meeting in Los Angeles, CA in May 2011. The deadline is **February 18, 2011**. For further information, click [here](#).

Last chance to apply for Technical Assistance Grants administered by the **Pennsylvania Federation of Museums and Historical Organizations** and funded through **Pennsylvania Historical and Museum Commission**. These grants help small historical organizations and museums to acquire skills to increase their level of professionalism and to better serve their audiences. If your annual budget is under \$250,000 you may be eligible for a TAG. Funding (up to \$1,500) can be used to train you and your paid or volunteer staff in collections or archives management, institutional development, and other capacity-building efforts. Eligible organizations should **apply as soon as possible**. These grants are available on a first come, first served basis. For eligibility requirements and application guidelines, click [here](#). For questions, click [here](#) to email Scott Doyle.

**National Endowment for the Humanities (NEH)** Landmarks of American History and Culture: Workshops for School Teachers. This grant supports organizations in the development of one-week residence-based workshops for a national audience of K-12 teachers. These workshops use historic sites to address central themes and issues in American history, government, literature, art, music, and related subjects. Grants will range between \$150,000 - \$180,000. The grant deadline is **March 1, 2011**. For grant guidelines and further



Successful Volunteer Recruitment Program" provides practical advice for successful volunteer recruitment. For further information on "Are You Ready for Volunteers, click [here](#). For further information on "Seven Steps to a Successful Volunteer Recruitment Program", click [here](#).

Looking for new and creative ways to attract visitors and members? Interested in the latest research on changing museum audience demographics and expectations? You can sign up for the Reach Advisors blog titled "Museum Audience Insight" in a free weekly e-newsletter format. To find out more or subscribe to the newsletter, click [here](#).

The list of free and low-cost resources for Southeastern Pennsylvania organizations available at the "Creating Connections" Conference is now online at the History Affiliates section of HSP's website. Click [here](#) to see the resource listing.

## ABOUT HISTORY AFFILIATES

There are hundreds of small history and heritage organizations in Southeastern Pennsylvania, and they face many similar challenges--a lack of funding, inadequate marketing resources, and a need to attract more visitors, members, and volunteers. To support these organizations in addressing these challenges, the Historical Society of Pennsylvania recently created the History Affiliates program. Currently in its planning stage and funded by the Barra Foundation, this new program will initially provide a network for organizations to better communicate with their peers in the region. For more information, click [here](#).

## CONTACT HISTORY AFFILIATES

Historical Society of

information, click [here](#).

**Institute for Museum and Library Science (IMLS)** has announced its 21<sup>st</sup> Century Museum Professionals Grants. The purpose of these grants is to increase the capacity of museums by improving the knowledge and skills of museum professionals in multiple institutions. Grants fund a wide range of activities, including the development and implementation of classes, seminars, and workshops; resources to support leadership development; collection, assessment, development, and/or dissemination of information that leads to better museum operations; activities that strengthen the use of contemporary technology tools to deliver programs and services; support for the enhancement of pre-professional training programs; and organizational support for the development of internship and fellowship programs. These matching grants will range between \$15,000 - \$500,000. The application deadline is **March 15, 2011**. For eligibility requirements, guidelines, and further information, click [here](#).

## Local Workshops

The Nonprofit Resource Center at the Margaret R. Grundy Memorial Library in Bucks County is offering several fundraising workshops in February, including **Grantseeking Basics for Nonprofits** (new class) on February 14 at 6 p.m. and **Introduction to Foundation Directory Online** on Monday, February 28 at 6 p.m. Both classes are free, but space is limited and registration is required. To register, click [here](#) or call 215-788-7891, ext. 6.

The Philadelphia Foundation is offering a workshop titled **Changing the World with Social Networking** led by writer, artist, and media technology expert Deanna Zandt. The workshop will be held Thursday February 17, 2011, from 12 p.m.-2 p.m. at the offices of the Leeway Foundation (1315 Walnut Street, Suite 832 in Center City East). The workshop is free but pre-registration is required. For more information about the workshop, click [here](#). The workshop is now filled, but you can contact the Leeway Foundation at 215-545-4078 to be placed on the waiting list--additional slots are likely to become available.

**Coming to Penn's Woods: Immigration to Pennsylvania in the 18<sup>th</sup> and 19<sup>th</sup> Centuries.** This workshop, sponsored by the Rural History Confederation and the Pennsylvania Humanities Council, will be held at Pennsbury Manor on February 23, 2011. Through speakers and discussion, this workshop will explore the impact of immigration on the Philadelphia region and beyond. For further information about the workshop, click [here](#).

The Mid-Atlantic Regional Archives Conference (MARAC) is sponsoring a **Practical Electronic Records Workshop** on Thursday, February 24, 2011, 9-4, at Rutgers University's Alexander Library, in New Brunswick, NJ. The cost for the workshop, which will be led by Bonnie Weddle, New York State Electronic Records Archivist, is \$75. For further information or to register, click [here](#).

3/14/2011

History Affiliates--Next Steps

Pennsylvania  
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Philadelphia, PA 19107  
215-732-6200  
[www.hsp.org](http://www.hsp.org)



## Webinars

The **Board Development 101** is the newest webinar developed by the American Association for State and Local History (AASLH), designed to provide training to the staff (volunteer and paid) and board members of museums and history organizations. The webinar will be two, 1.5 hour sessions on February 8 and February 15. The cost is \$85 for members and \$150 for nonmembers. For further information, click [here](#).

Registration is now open for AASLH's winter series of **StEPs Webinars**, the latest installment in the StEPs initiative (Standards and Excellence Program for History Organizations). These webinars are **free** of charge to staff and volunteers of museums, libraries, history organizations, historical sites, and archives who seek to learn and enhance standards and best practices at their institutions. These highly interactive webinars will connect you with experts and colleagues to discuss issues of common concern, ranging from strategic planning, collection policies, and fundraising. **All three webinars are open to AASLH members and nonmembers.** To see the full schedule or register, click [here](#).

## Get Involved

**Museums Advocacy Day 2011:** February 28-March 1, 2011, sponsored by the American Association of Museums (AAM). Museums Advocacy Day is your chance to join with advocates and colleagues from around the country and speak up for museums. The entire museum field is welcome to participate: staff, volunteers, trustees, students, even museum enthusiasts. Whether you are a seasoned advocate, or brand new to the process, Museums Advocacy Day is a unique opportunity to network with museum professionals from your state and meet with Congressional offices. For more information or to register, click [here](#).

If you would like more information about the History Affiliates Program or would like to be involved in the planning process, please contact Calista Cleary at (215) 732-6200 ext. 243 or [ccleary@hsp.org](mailto:ccleary@hsp.org).

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## “Creating Connections” Conference Postcard

# CREATING CONNECTIONS

## A HISTORY AFFILIATES CONFERENCE

AT THE HISTORICAL SOCIETY OF PENNSYLVANIA



SIGN UP NOW FOR

## CREATING CONNECTIONS

A CONFERENCE FOR HISTORY ORGANIZATIONS  
IN SOUTHEASTERN PENNSYLVANIA

MONDAY, OCTOBER 18, 2010 / 8:30 AM - 4:00 PM

HISTORICAL SOCIETY OF PENNSYLVANIA  
1300 LOCUST STREET / PHILADELPHIA

PLEASE JOIN US FOR THE INAUGURAL EVENT OF HISTORY AFFILIATES, A NEW PROGRAM BEING  
CREATED TO PROVIDE SUPPORT TO SMALL HISTORY ORGANIZATIONS IN SOUTHEASTERN PENNSYLVANIA.

### MORNING SESSION / 9:00 AM - 12:30 PM

ATTENDEES WILL LEARN ABOUT THE HISTORY AFFILIATES PROGRAM, FREE AND LOW-COST  
SERVICES, AND RESOURCES FOR HISTORICAL ORGANIZATIONS. GUEST SPEAKER ANDREW MASICH,  
PRESIDENT & CEO OF THE SENATOR JOHN HEINZ HISTORY CENTER, WILL DISCUSS THE HEINZ  
CENTER'S AFFILIATES PROGRAM.

### AFTERNOON SESSION / 1:15 PM - 4:00 PM

THE PENNSYLVANIA HOME FRONT IN THE CIVIL WAR DIGITAL ARCHIVES PROJECT SEEKS TO  
INCREASE ACCESS TO CIVIL WAR ARCHIVAL MATERIAL BY CATALOGING ORGANIZATIONS'  
UNPROCESSED CIVIL WAR-RELATED COLLECTIONS. FIND OUT ABOUT THE PROJECT AND HOW  
YOUR ORGANIZATION CAN PARTICIPATE.

REGISTER FOR THIS FREE CONFERENCE AT [WWW.HSP.ORG](http://WWW.HSP.ORG)

FOR MORE INFORMATION CONTACT CALISTA CLEARY AT 215-732-2600 x243 OR [CCLEARY@HSP.ORG](mailto:CCLEARY@HSP.ORG).

IN ASSOCIATION WITH THE CONSERVATION CENTER FOR ART AND HISTORIC ARTIFACTS, THE  
GREATER PHILADELPHIA CULTURAL ALLIANCE, AND THE PRESERVATION ALLIANCE FOR GREATER  
PHILADELPHIA. FUNDED BY THE BARRA FOUNDATION.



greater  
philadelphia  
**cultural  
ALLIANCE**



Historical Society  
of Pennsylvania



## APPENDIX G

### Breakout Group Ideas Generated From Creating Connections Conference 10/18/2010

**Collated answers in response to the following question: Based on your organization's biggest challenges, what specific programs, services or activities would strengthen your organization?**

#### Nonprofit Management

Financial management guidance  
Loss of institutional memory (help with succession planning)  
Cost negotiation  
Strategic planning resources  
Capacity and conservation assistance

Fundraising (participants were asked to put aside issue of funding, which is an assumed, and yet it still got mention)  
Grant writing

#### Advocacy

Legislative lobbying  
Advocacy  
Elected officials and leadership support

#### Collections Care

Digitization  
Master collections database

#### Marketing and Public Relations

Coordinated marketing plan  
Advertising—buy a block and parcel out  
**Marketing Resources** (bolded items indicate areas of particular interest that were mentioned multiple times)

Combined calendar of Events

#### Board and Volunteers

Help managing volunteers  
Board development

#### Communication Within History Community

Networking  
Creating online directory and map of History Affiliates (history organizations)  
Develop partnerships/synergies among groups

#### Communication and Partnerships Outside History Community

Develop ties with business community



Access to non-historical resources (interns, universities, media)  
Ways to provide opportunities to educators

### Professional Resources

Helpline—access to person who can help  
Database to matchmake organizations  
Professional development system—best practices training  
Listserv where you could ask questions  
Identification of existing service providers  
Technical and staff support  
Educational programs: collections care, board development —offered in suburbs

### Technology

#### **Technology**

Search engine optimization  
Website

### Membership

Get younger members involved

## APPENDIX H



### History Affiliates of Southeastern PA

1. Which of the following programs or services would your organization be most interested in?  
(number in parentheses indicates number of responses to that item)

- ☐ 1. Programs on marketing, public relations and social media (21)
- ☐ 2. Five-county listserv for historical organizations (20)
- ☐ 3. A region-wide online calendar for history events (20)
- ☐ 4. Online directory of historical organizations (20)
- ☐ 5. Programs on fundraising, including endowment development (18)
- ☐ 6. Programs on archival digitization (16)
- ☐ 7. Programs on integrating new technologies & technology planning (15)
- ☐ 8. Programs on collections care (15)
- ☐ 9. Programs on increasing and retaining membership (14)
- ☐ 10. County-by-county maps (print & online) of historical organizations (14)
- ☐ 11. Programs on volunteer recruitment, training and retention (14)
- ☐ 12. Online contractor/consultant database (13)
- ☐ 13. Collaborative matching of sites for staff sharing (12)
- ☐ 14. Quarterly meetings featuring training and networking (12)
- ☐ 15. Programs on interpreter & docent training (10)
- ☐ 16. Programs on board development: recruitment, training and retention (10)
- ☐ 17. Programs on generating new programming ideas (10)
- ☐ 18. Programs on archival accessioning, processing, cataloging and deaccessioning (10)
- ☐ 19. Programs on exhibit development and interpretive planning (10)
- ☐ 20. Collaborative opportunities for shared volunteer training (9)
- ☐ 21. Programs on preservation planning (8)
- ☐ 22. Archival consultation services, including needs assessment or preliminary processing (7)
- ☐ 23. Archival storage (7)
- ☐ 24. Programs on strategic planning (5)
- ☐ 25. Advocacy support (5)
- ☐ 26. Local broadcasting of professional conferences (AASLH, AAM) with networking component (4)
- ☐ 27. Programs on insurance and liability at historic organizations (3)
- ☐ 28. Other, please list \_\_\_\_\_

Additional programs suggested by participants:

- Specific topic roundtable discussions in various geographic locations
- Central certification program for guides/docents
- Equipment sharing, on #27, in addition to staff sharing
- Collaborative opportunities for education programming/field trips

- Coordination of activities of existing professional development organizations, i.e. Tri-State Coalition, Museum Council, Rural History Confederation. DVAG, PACSCL
- Bricks and mortar funding #1 (1)
- Strategies for recovery from inactive/damaging management (board/financials) (1)
- Website development, if not included in #1 (1)

2. Which of the programs or services you checked in the previous question would your organization be willing to pay for?

- ☐ 1. Programs on archival digitization (11)
- ☐ 2. Programs on fundraising, including endowment development (10)
- ☐ 3. Programs on collections care (8)
- ☐ 4. Programs on integrating new technologies and technology planning (7)
- ☐ 5. Online directory of historical organizations (6)
- ☐ 6. Programs on increasing and retaining membership (6)
- ☐ 7. Programs on preservation planning (5)
- ☐ 8. Programs on interpreter and docent training (4)
- ☐ 9. Programs on marketing, public relations and social media (4)
- ☐ 10. Programs on archival accessioning, processing, cataloging and deaccessioning (4)
- ☐ 11. Archival consultation services, including needs assessment or preliminary processing (4)
- ☐ 12. Archival storage (4)
- ☐ 13. Five-county listserv for historical organizations (4)
- ☐ 14. Collaborative matching of sites for staff sharing (4)
- ☐ 15. County-by-county maps (print & online) of historical organizations (3)
- ☐ 16. Online contractor/consultant database (3)
- ☐ 17. A region-wide online calendar for history events (3)
- ☐ 18. Quarterly meetings featuring training and networking (3)
- ☐ 19. Programs on exhibit development and interpretive planning (3)
- ☐ 20. Programs on insurance and liability at historic organizations (3)
- ☐ 21. Programs on generating new programming ideas (3)
- ☐ 22. Programs on volunteer recruitment and retention (3)
- ☐ 23. Programs on strategic planning (3)
- ☐ 24. Collaborative opportunities for shared volunteer training (2)
- ☐ 25. Advocacy support (2)
- ☐ 26. Local broadcasting of professional conferences (AASLH, AAM) with networking component (1)
- ☐ 27. Programs on board development: recruitment, training and retention (0)
- ☐ 28. Other, please list \_\_\_\_\_

Comments provided by participants:

- Would pay for all of above programs or services if cost less than \$20 per person per 1-hour session
- History Affiliates membership fee should fund above items
- Would pay for all of the above but have limited funds
- Can't say without knowing details and the cost
- Depends on cost
- Partial subsidies for professional consultation would be most welcome, to lower barriers to expert information/advice
- Pennypacker Mills is owned by Montgomery County. We are mandated to have free admission and events by the Commissioners. They set our budget and are cutting it 20% in 2011. You do the math!



## APPENDIX I

### History Affiliates Online Survey

- Comments provided by participants
- Would pay for all of above programs or services if cost less than \$20 per person per 1-hour session
  - History Affiliates membership fee should fund above items
  - Would pay for all of the above but have limited funds
  - Can't say without knowing details and the cost
  - Depends on cost
  - Partial subsidies for professional consultation would be most welcome, to lower barriers to expert information
  - Pennsylvania State is owned by Montgomery County. We are mandated to have free admission and events by the Commissioners. They set our budget and are cutting it 20% in 2011. You do the math.



# History Affiliates of Southeastern PA

## History Affiliates Survey

### \* Required Question(s)

#### How can History Affiliates help your organization ?

Our goal is to understand how we can provide support to history and heritage organizations in Southeastern Pennsylvania. The Historical Society of Pennsylvania is developing a History Affiliates Program and we want to know what programs and services your organization might be interested in. Please complete this quick, 10-question survey by **December 17** to let us know what programs and services would be most valuable to your organization. The survey takes approximately 3 minutes to complete. All individuals completing the survey (and providing contact information) will be entered in a raffle for two \$75 Visa gift cards.

#### \* 1. Is your organization:

- ☐ A nonprofit
- ☐ A 501 (c) (3) nonprofit
- ☐ A municipality
- ☐ Other

#### \* 2. How is your organization staffed?:

- ☐ Entirely volunteer run
- ☐ 1 - 3 paid professional staff
- ☐ 4 - 6 paid professional staff
- ☐ 7 - 10 paid professional staff
- ☐ Over 10 paid professional staff

**\* 3. What is your organization's annual budget?**

- ☐ No formal budget
- ☐ \$500 - \$24,999
- ☐ \$25,000 - \$49,999
- ☐ \$50,000 - \$99,999
- ☐ \$100,000 - \$249,999
- ☐ \$250,000 - \$499,999
- ☐ \$500,000 - \$999,999
- ☐ Over \$1,000,000

**\* 4. What do you see as the top 4 challenges of your organization currently?**

- ☐ Advocacy
- ☐ Board Issues
- ☐ Collections Care Issues
- ☐ Communication and Networking
- ☐ Exhibit & Interpretive Development
- ☐ Fundraising
- ☐ Membership
- ☐ Marketing & Public Relations
- ☐ Planning
- ☐ Professional Resources & Training
- ☐ Program Development
- ☐ Staffing
- ☐ Technology
- ☐ Visitation
- ☐ Volunteers
- ☐ Other \_\_\_\_\_

Comment:



500 characters left.

**\* 5. Which of the *specific* programs or services listed below would your organization be most likely to take advantage of?**

- ☐ Programs on board & volunteer recruitment, training and retention
- ☐ Collaborative opportunities for shared volunteer training
- ☐ Programs on archival management, including cataloguing & digitization
- ☐ Programs on collections care
- ☐ Archival consultation services, including needs assessment or preliminary processing
- ☐ Archival storage
- ☐ Five-county listserv for historical organizations
- ☐ Five-county directory of historical organizations
- ☐ Regional resource website for historical organizations
- ☐ Programs on generating new programming, exhibit & interpretive ideas
- ☐ Programs on fundraising and grant writing
- ☐ Programs on increasing and retaining membership
- ☐ Programs on marketing, public relations & social media
- ☐ A region-wide online calendar for historical organizations
- ☐ County-by-county maps of historical organizations
- ☐ Programs on planning, including preservation and strategic planning
- ☐ Online contractor & consultant database
- ☐ Programs on interpreter & docent training
- ☐ Quarterly meetings featuring professional development & networking
- ☐ Programs on integrating new technologies, technology planning & website development
- ☐ Other \_\_\_\_\_

Comment:

500 characters left.

**\*6. Which of the programs or services you checked in the previous question would your organization be willing and/or able to pay for at a reduced or subsidized rate?**

- ☐ Programs on board & volunteer recruitment, training and retention
- ☐ Collaborative opportunities for shared volunteer training
- ☐ Programs on archival management, including cataloguing & digitization
- ☐ Programs on collections care
- ☐ Archival consultation services, including needs assessment or preliminary processing
- ☐ Archival storage
- ☐ Five-county listserv for historical organizations
- ☐ Five-county directory of historical organizations
- ☐ Regional resource website for historical organizations
- ☐ Programs on generating new programming, exhibit & interpretive ideas
- ☐ Programs on fundraising and grant writing
- ☐ Programs on increasing and retaining membership
- ☐ Programs on marketing, public relations & social media
- ☐ A region-wide online calendar for historical organizations
- ☐ County-by-county maps of historical organizations
- ☐ Programs on planning, including preservation and strategic planning
- ☐ Online contractor & consultant database
- ☐ Programs on interpreter & docent training
- ☐ Quarterly meetings featuring professional development & networking
- ☐ Programs on integrating new technologies, technology planning & website development
- ☐ Other \_\_\_\_\_

Comment:

500 characters left.

**\*7. Would your organization be more likely to take advantage of a History Affiliates Program that charged a subsidized membership fee tied to annual budget or one that charged a flat subsidized fee per event or service?**

- \* 8. If the History Affiliates Program provided benefits including a regional directory, a regional list serv, a monthly newsletter, a resource website and reduced rates for workshops, how would you rate the following membership fees tied to annual budget?**

Under \$50,000     \$35  
Under \$100,000     \$75  
Under \$250,000     \$100  
Under \$500,000     \$125  
Under \$1,000,000     \$150  
Over \$1,000,000     \$175

Very Reasonable	Fairly Reasonable	Reasonable	Moderately Unreasonable	Very Unreasonable
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

- \* 9. Based on the benefits and membership fees in the previous question, how likely is it that your organization would join the History Affiliates Program?**

Very Likely	Fairly Likely	Likely	Fairly Unlikely	Very Unlikely
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comment:

500 characters left.

**10. Please enter the information indicated below.**

By entering my personal information, I consent to receive email communications from the survey author's organization based on the information collected.

First Name:

Last Name:

Company Name:



Work Phone:

Email Address:

emailaddress@xyz.com

Address 1:

Address 2:

City:

State/Province  
(US/Canada):

-- Select a state --

Postal Code:

**Thank you very much for your feedback!****Finish**

## APPENDIX J

### Overall Results of History Affiliates Online Survey

How can History Affiliates help your organization? (27% goal is to understand how we can provide support to history and heritage organizations in Pennsylvania. The History Society of Pennsylvania is currently developing a History Affiliates Program and we want to know what programs and services your organization might be interested in. Please complete this quick, 10-question survey by December 15 to let us know what you think. We will send you a report on the results of the survey. The survey takes approximately 5 minutes to complete. All individuals completing the survey (and providing contact information) will be entered in a drawing for two \$25 gift cards.

#### Text Block

How can History Affiliates help your organization? (27% goal is to understand how we can provide support to history and heritage organizations in Pennsylvania. The History Society of Pennsylvania is currently developing a History Affiliates Program and we want to know what programs and services your organization might be interested in. Please complete this quick, 10-question survey by December 15 to let us know what you think. We will send you a report on the results of the survey. The survey takes approximately 5 minutes to complete. All individuals completing the survey (and providing contact information) will be entered in a drawing for two \$25 gift cards.

Is your organization?




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## History Affiliates Survey

[Survey Details](#) | [Overall Results](#) | [Individual Results](#)**Results View:** [Partial & Completed](#) [Update View](#) **100 Responses**  | [Filter these respondents](#)    Export results to: [- Select a file type -](#)**Share results:** No**Results URL:** Available when results sharing is enabled.

Click a value under 'Number of Responses' to view those respondents and save them to a list.  
(For rating and ranking questions, click on Show Details first. Not available for open-ended text and questions that collect personal information.)

---





### Text Block:

How can History Affiliates help your organization ?Our goal is to understand how we can provide support to history and heritage organizations in Southeastern Pennsylvania. The Historical Society of Pennsylvania is developing a History Affiliates Program and we want to know what programs and services your organization might be interested in. Please complete this quick, 10-question survey by December 17 to let us know what programs and services would be most valuable to your organization. The survey takes approximately 3 minutes to complete. All individuals completing the survey (and providing contact information) will be entered in a raffle for two \$75 Visa gift cards.






---

1 **\* Is your organization:**











Answer	0%	100%	Number of Responses	Response Ratio
A nonprofit			<a href="#">12</a>	12.0%
A 501 (c) (3) nonprofit			<a href="#">77</a>	77.0%
A municipality			<a href="#">13</a>	13.0%
Other <a href="#">View all</a>			<a href="#">7</a>	7.0%
<b>Totals</b>			<b>100</b>	<b>100%</b>

















## 2 \* How is your organization staffed?:

Answer	0%	100%	Number of Responses	Response Ratio
Entirely volunteer run			<a href="#">43</a>	43.0%
1 - 3 paid professional staff			<a href="#">26</a>	26.0%
4 - 6 paid professional staff			<a href="#">19</a>	19.0%
7 - 10 paid professional staff			<a href="#">4</a>	4.0%
Over 10 paid professional staff			<a href="#">8</a>	8.0%
No Responses			0	0.0%
<b>Totals</b>			<b>100</b>	<b>100%</b>

## 3 \* What is your organization's annual budget?



Answer	0%	100%	Number of Responses	Response Ratio
No formal budget			<a href="#">12</a>	12.1%
\$500 - \$24,999			<a href="#">31</a>	31.3%
\$25,000 - \$49,999			<a href="#">6</a>	6.0%
\$50,000 - \$99,999			<a href="#">5</a>	5.0%
\$100,000 - \$249,999			<a href="#">17</a>	17.1%
\$250,000 - \$499,999			<a href="#">14</a>	14.1%
\$500,000 - \$999,999			<a href="#">10</a>	10.1%
Over \$1,000,000			<a href="#">4</a>	4.0%
<b>Totals</b>			<b>99</b>	<b>100%</b>




















## 4 \* What do you see as the top 4 challenges of your organization currently?

Answer	0%	100%	Number of Responses	Response Ratio
Advocacy			<a href="#">8</a>	8.0%
Board Issues			<a href="#">26</a>	26.0%
Collections Care Issues			<a href="#">30</a>	30.0%
Communication and Networking			<a href="#">12</a>	12.0%
Exhibit & Interpretive Development			<a href="#">14</a>	14.0%
Fundraising			<a href="#">67</a>	67.0%
Membership			<a href="#">36</a>	36.0%
Marketing & Public Relations			<a href="#">43</a>	43.0%
Planning			<a href="#">14</a>	14.0%
Professional Resources & Training			<a href="#">16</a>	16.0%
Program Development			<a href="#">19</a>	19.0%
Staffing			<a href="#">20</a>	20.0%
Technology			<a href="#">16</a>	16.0%
Visitation			<a href="#">17</a>	17.0%
Volunteers			<a href="#">37</a>	37.0%
Other ( <a href="#">View all</a> )			<a href="#">8</a>	8.0%
<b>Totals</b>			<b>100</b>	<b>100%</b>

[View comments \(21\)](#)

## 5 \* Which of the specific programs or services listed below would your organization be most likely to take advantage of?

















Answer	0%	100%	Number of Responses	Response Ratio
Programs on board & volunteer recruitment, training and retention			<a href="#">42</a>	42.0%
Collaborative opportunities for shared volunteer training			<a href="#">25</a>	25.0%

Programs on archival management, including cataloguing & digitization		<a href="#">34</a>	34.0%
Programs on collections care		<a href="#">33</a>	33.0%
Archival consultation services, including needs assessment or preliminary processing		<a href="#">15</a>	15.0%
Archival storage		<a href="#">18</a>	18.0%
Five-county listserv for historical organizations		<a href="#">40</a>	40.0%
Five-county directory of historical organizations		<a href="#">42</a>	42.0%
Regional resource website for historical organizations		<a href="#">53</a>	53.0%
Programs on generating new programming, exhibit & interpretive ideas		<a href="#">29</a>	28.9%
Programs on fundraising and grant writing		<a href="#">55</a>	55.0%
Programs on increasing and retaining membership		<a href="#">51</a>	51.0%
Programs on marketing, public relations & social media		<a href="#">48</a>	48.0%
A region-wide online calendar for historical organizations		<a href="#">54</a>	54.0%
County-by-county maps of historical organizations		<a href="#">29</a>	28.9%
Programs on planning, including preservation and strategic planning		<a href="#">28</a>	28.0%
Online contractor & consultant database		<a href="#">31</a>	31.0%
Programs on interpreter & docent training		<a href="#">26</a>	26.0%
Quarterly meetings featuring professional development & networking		<a href="#">31</a>	31.0%
Programs on integrating new technologies, technology planning & website development		<a href="#">34</a>	34.0%
Other ( <a href="#">View all</a> )		<a href="#">4</a>	4.0%
<b>Totals</b>		<b>100</b>	<b>100%</b>

[View comments \(8\)](#)



6 \* Which of the programs or services you checked in the previous question would your organization be willing and/or able to pay for at a reduced or subsidized rate?

Answer	0%	100%	Number of Responses	Response Ratio
Programs on board & volunteer recruitment, training and retention			<a href="#">22</a>	23.6%
Collaborative opportunities for shared volunteer training			<a href="#">9</a>	9.6%
Programs on archival management, including cataloguing & digitization			<a href="#">17</a>	18.2%
Programs on collections care			<a href="#">20</a>	21.5%
Archival consultation services, including needs assessment or preliminary processing			<a href="#">9</a>	9.6%
Archival storage			<a href="#">11</a>	11.8%
Five-county listserv for historical organizations			<a href="#">9</a>	9.6%
Five-county directory of historical organizations			<a href="#">8</a>	8.6%
Regional resource website for historical organizations			<a href="#">12</a>	12.9%
Programs on generating new programming, exhibit & interpretive ideas			<a href="#">13</a>	13.9%
Programs on fundraising and grant writing			<a href="#">39</a>	41.9%
Programs on increasing and retaining membership			<a href="#">27</a>	29.0%
Programs on marketing, public relations & social media			<a href="#">23</a>	24.7%
A region-wide online calendar for historical organizations			<a href="#">10</a>	10.7%
County-by-county maps of historical organizations			<a href="#">6</a>	6.4%
Programs on planning, including preservation and strategic planning			<a href="#">11</a>	11.8%

Online contractor & consultant database		<a href="#">4</a>	4.3%
Programs on interpreter & docent training		<a href="#">10</a>	10.7%
Quarterly meetings featuring professional development & networking		<a href="#">18</a>	19.3%
Programs on integrating new technologies, technology planning & website development		<a href="#">19</a>	20.4%
Other ( <a href="#">View all</a> )		<a href="#">7</a>	7.5%
<b>Totals</b>		<b>93</b>	<b>100%</b>

[View comments \(17\)](#)

- 7 **\* Would your organization be more likely to take advantage of a History Affiliates Program that charged a subsidized membership fee tied to annual budget or one that charged a flat subsidized fee per event or service?**

Answer	0%	100%	Number of Responses	Response Ratio
Subsidized membership fee			<a href="#">43</a>	43.8%
Flat subsidized fee per event or service			<a href="#">55</a>	56.1%
<b>Totals</b>			<b>98</b>	<b>100%</b>

- 8 **\* If the History Affiliates Program provided benefits including a regional directory, a regional list serv, a monthly newsletter, a resource website and reduced rates for workshops, how would you rate the following membership fees tied to annual budget? Under \$50,000 \$35 Under \$100,000 \$75 Under \$250,000 \$100 Under \$500,000 \$125 Under \$1,000,000 \$150 Over \$1,000,000 \$175**

1 = Very Reasonable , 2 = Fairly Reasonable , 3 = Reasonable , 4 = Moderately Unreasonable , 5 = Very Unreasonable

	1	2	3	4	5	Number of Responses	Rating Score*
						100	2.3

\*The Rating Score is the weighted average calculated by dividing the sum of all weighted ratings by the number of total responses.

[Show Details](#)

9 **\* Based on the benefits and membership fees in the previous question, how likely is it that your organization would join the History Affiliates Program?**

1 = Very Likely , 2 = Fairly Likely , 3 = Likely , 4 = Fairly Unlikely , 5 = Very Unlikely

	1	2	3	4	5	Number of Responses	Rating Score*
						100	2.4

\*The Rating Score is the weighted average calculated by dividing the sum of all weighted ratings by the number of total responses.

[View comments \(17\)](#)

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10 **Please enter the information indicated below.**

Remember, you can import these responses into your Contacts. [View the answers](#) to do this.

Answer	Number of Responses
First Name	90
Last Name	90
Company Name	89
Work Phone	88
Email Address	92
Address 1	91
Address 2	10
City	91
State/Province (US/Canada)	91
Postal Code	91

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**Text Block:**

Thank you very much for your feedback!

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### History Affiliates Actual Grant Budget

# APPENDIX K

## History Affiliates Actual Grant Expenses (through 3/3/2011)

Grant Expenses	Vendor	Date	Expense	Total	Overall Total
Advisory Board Lunch	Citi Market Place	9/23/10	\$73.32		
Advisory Board Lunch	Citi Market Place	11/11/10	\$46.36		
Conference Postcard	Overnight Prints	10/1/10	\$119.34		
Stamps for Conference Postcard	USPS	9/9/10	\$127.60		
Lunch Catering for Conference	Chef's Table	10/18/10	\$1,268.00		
Lunch Catering for Conference--reimbursed by Penn State	Chef's Table		-\$1,268.00		
Honorarium for Andrew Masich	Heinz History Center	10/18/10	\$250.00		
UPS charge--return of postcards	UPS	10/9/10	\$5.28		
Donuts	Dunkin Donuts	10/19/10	\$52.43		
Advisory Board Meeting Food (2 separate receipts)	Trader Joe's	7/25/10	\$14.96		
Two \$75 Visa gift cards for survey raffle incentive	CVS		\$159.90		
E-Newsletter Template Redesign	Tabula	8/30/10	\$300.00		
Affiliates Logo Creation	Master's Group Design	9/28/10	\$508.00		
Laptop Computer	TeleQ Network Solution	3/25/10	\$1,234.00		
Independent Grant Evaluator (12.5 hours at \$50/hour)	Kenneth Wolensky	12/6/09-12/3/10	\$625.00		
Consultant signing bonus			\$5,000.00		
Consultant salary		4/2010 - 3/9/2011	\$20,323.78		
Office Supplies		4/2010-11/2010	\$408.57		
Office Supplies	Ogden Brothers	3/3/11	\$88.99		
				<b>\$29,337.53</b>	
<b>Personal Expenses (billed to grant)</b>	<b>Miles</b>	<b>Date</b>	<b>Expense</b>		
Mileage to PennyPacker Mills		7/7/10	\$26.95		
Mileage to CCHPN Meeting--West Chester, PA		9/14/10	\$19.80		
Mileage to DCHPN Meeting--Chadds Ford, PA		9/16/10	\$26.95		
Mileage to Tri-State Coalition Meeting--Yorklyn, DE		9/24/10	\$26.95		
Cab Fare from RFC mtg. to HSP		9/1/10	\$7.92		
Parking Downtown		10/12/10	\$9.00		
Mileage to Fairmount Park Houses Meeting--Philadelphia		10/12/10	\$8.80		
Mileage to RHC Meeting--Bristol, PA		11/10/10	\$38.50		
Tolls to RHC Meeting		11/10/10	\$7.89		
Cab Fare to GPCA Meeting		5/28/10	\$12.46		
Roundtrip Mileage to Statewide Museums Conference--Williamsport, PA		11/8/- 11/9/2010	\$188.65		
Milage to Historic Germantown Meeting		1/11/11	\$13.75		
Mileage to HG Meeting		1/11/2011	\$13.75		
Mileage to DCHPN Meeting--Chadds Ford, PA		2/3/2011	\$12.65		
Lunch Meeting--Marge Salvante		2/16/2011	\$35.16		
				<b>\$449.18</b>	
					<b>\$29,786.71</b>