



Hartford Preservation Alliance Strategic Plan January 2014-January 2017

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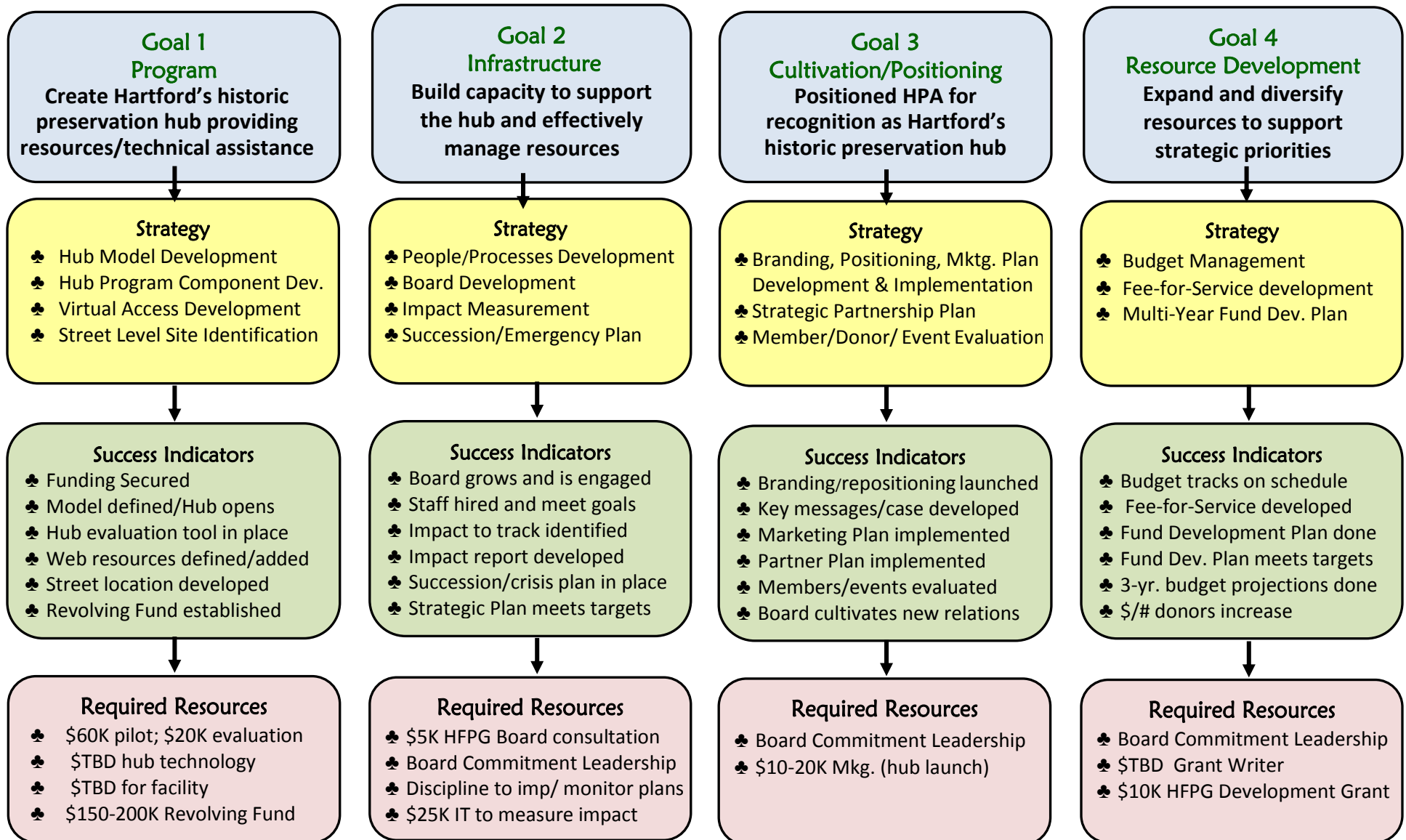
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Hartford Preservation Alliance Strategic Summary Framework

Focusing Priority

To be Hartford's historic preservation resource and technical assistance hub
and develop the organizational structure, partnerships and resources to support it





The HUB for Hartford historic preservation resources and referral Proposed Components





Planning Process Background

Introduction

In the 16 years since its founding the Hartford Preservation Alliance (HPA) has built a strong reputation as the primary advocate for the preservation and revitalization of Hartford's unique architectural heritage and neighborhood character. The Alliance's work is focused on education, technical assistance and advocacy. With this focus, the HPA has built a working knowledge for the preservation and appreciation of the roughly 5,500 registered historic buildings throughout Hartford's neighborhoods and downtown.

Today, the Alliance is in the midst of a transition, poised to move forward as a partner in the challenge of community economic development in Hartford. The HPA believes that preservation-aided community economic development can lay the foundation for preserving our heritage and at the same time revitalize key neighborhoods.

With this new focus in mind, the Board recently hired an executive director with economic development experience and committed to strategic planning. Through this strategic planning process, HPA reviewed the tenets of its founding to take a bold look down the road. The Alliance's goal is to build capacity to effectively support preservation of Hartford's rich architectural heritage yet combine that with the 21st century realities to emerge as a major regional and state preservation hub. This document charts the roadmap to achieve this focusing priority.

Planning Methodology

The planning process commenced in October with a 360 degree organizational review. Key findings are summarized in the Situational Analysis (appendix A1-A-13)

A planning committee convened three times to plan the planning and the full Board took an active role in plan development in the form of two mini-retreats in November and December. In January the Board approved the Focusing Priority that set the stage for the development of a model historic preservation hub, which is the platform of this strategic plan. The Board approved the planning goals at the February Board meeting. A supporting budget and implementation plan was also developed as part of the strategic planning process.

Value Proposition

The Hartford Preservation alliance revitalizes communities, reconnects us to our heritage and Collaborates to impact community economic development (for those who live and work in Hartford):

- **By providing a one-stop hub** for technical assistance, resources and referral services
- **By providing expertise and tools** to safeguard Hartford's architectural and heritage assets
- **By being a key voice** for preserving the built environment that makes Hartford unique and appealing
- **By influencing the development of public policy** to prevent blight and demolition
- **By becoming recognized as a partner** in community and economic development
- **By convening** stakeholders and advocates around a common vision



Planning Framing Question

What program focus and activities will enhance our impact, relevance (value) for our audiences and assure organization sustainability?

Additional Questions Explored

- **MISSION:** How does HPA become more relevant? Should we be providing coordinated direct service or continue offering a random array of strategic activities? What does it mean to provide education, advocacy, technical assistance and economic development?
- **AUDIENCES:** Who are our primary customers and strategic partnerships? What do they value? How do we provide them greater value? Who should be our target audience for the next 12 months? 18-36 months? Are there new and different audiences we should consider serving?
- **CASE FOR SUPPORT:** How can we document and track our impact? Why are we worthy of investment?
- **SUSTAINABILITY:** How can we expand and diversify funding—grants, fee-for-service, individual donations? How do we assure that we have stable staffing, resource, program delivery and meet evolving needs?
- **BRAND/POSITION:** What is our brand and market position? How can we increase our visibility?
- **STRATEGIC PLAN/INFRASTRUCTURE:** What are our strategic priorities and strategies to become more sustainable, visible and relevant for our primary customers and partners? What organizational capacity, Board/staff training will be required to implement our strategy?

Key Strategic Decisions

- Historic property owners and the city of Hartford are HPA's primary customers.
- To develop the resources, infrastructure and partnerships to be Hartford's Historic Preservation Hub, providing resource and technical assistance.
- As part of this hub, HPA must develop a physical location, tangible products/programs and demonstrate mission impact to be more relevant and better recognized.
- Marketing/positioning initiatives must be developed to support HPA's historic preservation Hub roll-out.
- Board Standing Committees will include Executive, Finance and Governance; other Board activities will be completed through defined task forces enabling HPA to be more focused, nimble and respond to opportunities.

Emerging Strategic Imperatives

- Identify resources (staff and financial) to develop the Hub.
- Develop the hub model (programs and infrastructure).
- Rebrand the HPA around the hub priority service delivery focus.
- Build a skill-based Board and engage Board in mission and strategic activities.
- Identify outcomes to measure and develop the tools to track and report.
- Increase the number of historic listed properties in the city of Hartford



Strategic Plan

Mission

Revitalize, Connect and Collaborate

Revitalize the historic fabric of Hartford,

Connect us to our heritage and

Collaborate to impact community economic development

*By providing historic preservation and revitalization technical assistance, education and advocacy,
for those who live and work in Hartford*

Vision

**We envision a thriving Hartford whose future prosperity builds on our rich heritage through our
historically significant architecture, sites and neighborhoods.**

In striving to achieve this vision the Hartford Preservation Alliance will:

- **Be the heritage preservation hub**—the place where people who live and work in Hartford go for heritage preservation technical assistance and support
- **Assume a leadership role in partnering for the City's revitalization**—so that what's old is new and tenants and homeowners will stand in line to rent, buy and work in Hartford
- **Influence and inform historic preservation's community economic development potential**—driving agenda and content
- **Support compliance with the Historic Preservation Commission's development guidelines**
- **Promote and create neighborhood historic districts**
- **Play a vital role in re-envisioning and preserving the City's historic housing stock**—and in encouraging new homeowner's to the city
- **Demonstrate tangible impact and achieve recognition for our approach and results**

Values

Historic Preservation is a Practical investment

Builds community ♦ Creates a unique and diverse sense of place ♦ Encourages economic development

- **Community Building:** By encouraging people to come together around preservation projects and smart growth, historic preservation builds community pride in being part of something meaningful. It pulls people together to keep the memories that matter, provides meaningful opportunities to work together and build something—to be part of the “hood.” It, helps you know your neighbors, feel safe walking around, make neighborhoods more energized and friendly, have shopping and jobs within walking distance to make neighborhoods.
- **Sense of Place:** By preserving a window into our history, architecture and culture, historic preservation builds aesthetically pleasing neighborhoods where people want to live and work and creates a differentiating sense of place. Makes sure we have a “there” there and not just anonymous strip malls of Nowhereville, USA.
- **Economic Development:** By integrating historic preservation into economic development, the Hartford Preservation Alliance helps build on the existing fabric of the city to encourage investment and create a more successful and cohesive community



Strategic Plan Focusing Priority, Strategic Goals and Key Strategies

Focusing Priority

To be Hartford's historic preservation resource and technical assistance hub and develop the organizational structure, partnerships and resources to support it for historic property owners and the city of Hartford

so that the HPA is relevant, is recognized and achieves mission impact and sustainability

Goal 1: Program: To create Hartford's historic preservation hub that provides technical assistance and resources for historic homeowners and city officials by:

- a. **Hub Model Development:** Develop pilot and evaluation model
- b. **Hub Program Component Development:** Explore/implement Revolving Fund, Financial Resource Advice, Historic Commission Application, Historic Database
- c. **Virtual Access Development (on line resources):** Consider tools to enhance hub support on-line
- d. **Street Level Site Identification:** Explore sustainable facility options

Goal 2: Infrastructure (People and Processes): To build organization capacity to support the historic preservation hub and programs and effectively manage resources by:

- a. **People and Processes Development:** Consider staff structure, training, processes and technology
- b. **Board Development:** Consider composition, nomination, orientation, evaluation roles, responsibilities and structure
- c. **Impact Measurement Development :** Consider what to measure and how to track and report data
- d. **Leadership Succession & Emergency Planning:** Discuss and develop process and document

Goal 3: Positioning/Cultivation: To position HPA to be recognized as the hub for Hartford historic preservation technical assistance by:

- a. **Branding, Positioning, Marketing Action pPlan Development:** Consider case, messages, market position and hub launch materials
- b. **Strategic Partnership Prioritized Action Plan Development:** Consider and prioritize Walking Tours, Advisory Council, Awards Ceremony, Best Dressed, Tippler Tour, Urban Planning Input etc.
- c. **Membership, Donor, Event Evaluation:** Prioritize initiatives that deliver the greatest ROI

Goal 4: Resource Development: To expand funding to support strategic priorities by:

- a. **Budget Management:** Develop/monitor annual budget. reserves and multi-year projections
- b. **Resource Development:** Consider fee-for-service opportunities (e.g.: real estate activity and project management) and develop prioritized action plan
- c. **Fundraising Plan Development:** Consider grants, events, Individuals, foundations, corporations



Hartford Preservation Alliance Implementation Plan

Goals, Priorities and Strategies	Leadership Responsibility	Q 1 2014	Q 2 2014	Q 3 2014	Q 4 2014	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q 1 2016	Q 2 2016	Q3 2016	Q4 2016
Goal 1: Program: Create a historic preservation hub providing technical assistance and resources for historic homeowners and city officials by:													
1a. Historic Preservation Hub Development: Develop/implement pilot/evaluation model													
• Develop concept model and simple supporting educational materials—fact sheet	FH/BP/FEC	X	X										
• Identify resources to support model development-\$60K	FH	X	X										
• Explore funding from SHPO	FH	X	X										
• Obtain City support for HUB partnership	FH	X	X										
• Seek support from HFPG and other funders	FH	X	X										
• Convene Hub Task Force	FH/TBD TF		X	X	X								
• Launch soft Hub opening (June) and Grand Launch (Annual Meeting)	FH/Board			X	X								
• Evaluate and modify model over 3-years						X		X		X		X	X
1b. Supporting Technical Assistance Program Components: Explore/implement revolving fund, Financial Resource Advice, Historic Commission Applic, Database													
• Implement and monitor model	FH/Staff	X	X	X	X	X	X	X	X	X	X	X	X
• Build construction expertise database for homeowner access	FH/Staff		X	X	X	X	X	X					
• Explore Revolving Fund feasibility; make recommendation by end of 2014	FH/Task Force TBD		X	X	X	X							
• Enhance Historic Database and monitor utilization	MF	X	X	X	X	X	X	X	X	X	X	X	X
• Create credentialed contractor database and monitor utilization	Staff TBD		X	X	X	X	X	X	X	X	X	X	X
• Explore strategic role opportunities in State Historic Tax Credit	FH/Task Force TBD			X	X	X	X	X	X	X	X	X	X
• Create financial toolbox for Financial Resource Advice	FH/MF	X	X	X	X								
1c. Virtual Access (on line resources): Consider tools to enhance hub support on-line													
• Convene Task Force to identify capacity needs/potential offerings—webinars, toolbox etc.	FH/Task Force TBD									X	X	X	X
1d: Street Level Site Identification: Explore sustainable facility options													
• Convene Task Force to explore and evaluate potentials options	FH/Task Force TBD					X	X						



Hartford Preservation Alliance Implementation Plan

Goals, Priorities and Strategies	Leadership Responsibility	Q 1 2014	Q 2 2014	Q 3 2014	Q 4 2014	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q 1 2016	Q 2 2016	Q3 2016	Q4 2016
Goal 2: Infrastructure: Build organization capacity to support the historic preservation hub location/facility & programs and effectively manage resources													
2a. People and Processes													
• Hire and train staff to plan and launch	FH	X	X										
• Review and refocus staff resources to support Hub focus—new job descriptions	FH/MF	X	X										
• Complete technology grant HFPG	FH/Consultant	X	X										
• Annually review processes, technology, infrastructure needed to sustain support of hub	FH/Board				X	X							
• Annual evaluate staff performance and set annual goals	FH/Board Chair					X							
2b. Board Building: clarify roles, responsibilities, structure, nomination and orientation:													
• Convene Governance Committee, develop charter and workplan	Gov. Comm	X	X										
• Clarify Board Roles, Responsibilities and structure	Gov. Comm	X	X										
• Convene Annual Meeting Task Force	FH/Gov. Com/TF	X	X										
• Develop and implement formal nomination and orientation process	Gov. Comm.	X	X										
• Nominate at least 3 new Board members annually	Gov. Comm/Board	X	X	X									
• Clarify committees/task forces, chairs and work plans	Gov. Comm	X	X										
• Convene Governance Committee regularly	Gov. Comm.		X	X	X	X	X	X	X	X	X	X	X
• Evaluate Board annually; monitor committees, task forces, strategic plan implementation	Gov. Comm.		X	X	X	X	X	X	X	X	X	X	X
2c. Impact Measurement: Determine what to measure													
• Convene Impact Task Force to decide what we want to and can measure	FH/DP/JG/JK/TF		X	X	X								
• Identify resources (\$, Technology and people) to track impact	FH/consultant				X	X							
• List partnerships and activities on web pages	MF	X	X	X	X	X	X	X	X	X	X	X	X
• Develop baseline & dashboard/report card to demonstrate historic preservation impact	FH/DP/Cons.			X	X	X	X	X	X	X	X		
2d: Leadership Succession and Emergency Planning													
• Complete basic succession plan and review annually	FH/Board/ FEC	X	X	X		X				X			



Hartford Preservation Alliance Implementation Plan

Goals, Priorities and Strategies	Leadership Responsibility	Q 1 2014	Q 2 2014	Q 3 2014	Q 4 2014	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q 1 2016	Q 2 2016	Q3 2016	Q4 2016
Goal 3: Positioning/Cultivation: To position HPA to be recognized as the hub for historic preservation technical assistance by:													
3a. Branding, Positioning, Marketing Action plan : Case for Support; Key Message development													
• Develop Fact Sheet, Graphic, Case and Message Cards, Tag Line	FH/FEC/ BP/Board	X	X										
• Train Board as cultivation ambassadors to promote hub priority	FEC/Board	X	X										
• Develop marketing strategies, materials and plan to launch the hub and rebranding	FH/BP/Board	X	X	X									
• Develop/implement/monitor annual marketing/cultivation strategy	FH/BP				X	X	X	X	X	X	X	X	X
3b. Strategic Partnership Action Plan Development:													
• Maintain current Strong Partnerships: City/ SHOP	FH	X	X	X	X	X	X	X	X	X	X	X	X
• Evaluate/plan strategic walking tours	FH/MH				X	X							
• Convene Editorial Advisory Council	FH/TBD				X	X							
• Convene Task Forces—with external people: HUB (1a); Revolving Fund (1b); Tax Credit (1b); Virtual(1b); Site Identification (1d); Impact (2c); Member/Event (3c)	TBD	X	X	X	X	X	X	X	X	X	X	X	X
• Explore/prioritize Old State House partnership	FH		X										
• Explore/prioritize CT Humanities Council partnership	FH			X									
• Explore/prioritize Corporation partnerships	FH		X	X									
• Explore/prioritize CT Main Street partnership	FH				X								
• Explore/prioritize Metro Hartford Alliance partnership	FH				X								
3c. Member, donor, event evaluation													
• Convene Member Value Evaluation Task Focus—after Hub launch	BP/FH/MF			X									
• Review member levels, categories and value and develop 2015 action plan and goals	FH/BP/Board/MF				X	X	X	X	X				
• Convene Event Evaluation Task Force—post launch (consider mission impact/\$)	TBD (BK-JK) TF				X	X	X						
• Develop annual member, event plan based on above TF recommendations	TBD/ TF						X	X					X



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Goals, Priorities and Strategies	Leadership Responsibility	Q 1 2014	Q 2 2014	Q 3 2014	Q 4 2014	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q 1 2016	Q 2 2016	Q3 2016	Q4 2016
Goal 4: Positioning/Cultivation: To position HPA to be recognized as the hub for historic preservation technical assistance by:													
4a. Budget Management													
• Develop annual budget	FH/Finance	X			X	X			X	X			
• Monitor Budget monthly to assure it tracks on schedule	FH/Finance/Brd	X	X	X	X	X	X	X	X	X	X	X	X
• Develop maintain and grow 3-year budget projections	FH/Finance		X	X	X								
• Consider strategies to build and invest an operating reserve	FH/Board												
4b. Resource Development: Consider fee-for-service opportunities													
• Explore real estate activity						X							
• Explore project management		X											
• Develop prioritized action plan						X							
4c. Fund Development Plan													
• Attend Hartford Foundation Training			X										
• Develop/monitor annual grants calendar				X		X		X		X		X	
• Conduct annual appeal with goal of increasing \$ and #	FH/BP/MF			X	X			X	X			X	X
• Consider strategies to cultivate and thank top donors													
• Assure 100% Board participation in annual appeal and increase annual gift \$	Board	X				X				X			
• Ask Board to personally sign annual appeal letters and thank you notes	Board				X				X				X
• Ask Board to provide 10 names of people to approach for basic member/donor letter	Board			X	X								

Hartford Preservation Alliance Mission Pathway Framework

Focusing Question: What program focus and activities will enhance our impact, relevance (value) for our audiences and assure organization sustainability

What We Do (Mission)	How We Do It (Program Components)	For Whom (Key Audiences/Stakeholders)	Why We Matter (impact/difference we make)
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One-Stop-Hub

Mission
Revitalizes communities, connects us to our heritage and collaborates to impact community economic development

Value Proposition

- By providing a one-stop hub
- By providing expertise/tools
- By being a key HP voice
- By influencing development of public policy
- By becoming recognized as the Historic Preservation Hub and community and economic partner

Technical Assistance

- Construction Resources
- Tax Credits
- Historic Comm. Applic.
- Revolving Fund
- Financial Res Advice
- Historic Databasee

Advocacy

- Tax Credits
- Historic District
- Govt. preserv. Intervent.

Lead and Convene

- Annual Meeting
- Advisory Council
- Strategic Forums—TBD

Education

- Strategic Tours
- General classes
- Curriculum devel. projects

Misc. Projects

- Real Estate Activities
- City Historic Preservation Partnerships
- Preservation House Tour

Primary Customers

- The City
- Historic Homeowners

Secondary Customers

- The State
- Foundations
- Corporate Sponsors
- Members/Board
- New residents, bus. owners, professionals

Additional Stakeholders

- Contractors/Architects
- Developers
- Corporations
- Small Businesses
- Realtors
- Nonprofit partners
- Preservation Groups
- Heritage Houses

HPA Indicators

- # Use 1-stop center
- # Tax Credits (TA)
- \$ Invested in revolving fund
- # Tangible Projects
- # Historic Permits (TA)
- # Hits to Database
- # Hits to Webpage
- # HPA Renovation Bdg. (TA)
- # Strategic Tours
- Increase # of protected

Community Indicators

- # Foreclosures
- % Property Value Growth
- \$ Median Housing Values
- % Crime Rate Decreases
- # Historic Permits
- \$ Tax credits
- # Vacant properties
- # Tax delinquent properties
- Job Growth
- Business Growth
- Tourism Growth
- # Professionals purchase

Hartford Preservation Alliance Strategic Plan revised Tuesday, October 14, 2014




Red indicates programs to be explored

Hartford Preservation Alliances Strategic Plan Required Resources, Purposes & Funding Options

Goal/Priority Area	Required Resources	Est. Cost	Fund Options	F/Y 14	F/Y 16	F/Y 16
Goal 1: Program	• Hub development	\$60K	• SHPO	X		
	• Hub evaluation	\$20K	• HFPG/SHPO grant	X		
	• Revolving Fund	\$15K PTE \$150K capital	• 1772 Foundation • HFPG	X	X	
	• Hub Technology	\$TBD	• TBD			
	• Street Facility	\$TBD	• TBD			
Goal 2: Infrastructure	• Impact Measure Reporting Development.(staff and technology)	\$25K	• HFPG Grant	X	X	
	• Governance Consultation	\$5K	• HFPG	✓		
Goal 3: Positioning/ Marketing	• Rebranding	\$10-20K	• SHPO Grant	X		
Goal 4: Financial:	• Development Plan	\$10K	• HFPG TAG		X	X

HPA Strategic Plan Budget Projections 2014-2016				
		2014	2015	2016
Income				
Grant Income				
DECD/SHPO - BOS		75,000	75,000	80,000
DECD/SHPO - Parkville Historic District		1,850		
Community Education TBD		10,000	10,000	10,000
John E Rogers School Technical Assistance		10,000	10,000	10,000
City of Hartford Partnership Support		45,000	45,000	45,000
Travelers Foundation		10,000	10,000	10,000
HFPG -General Operating Support		100,000	100,000	100,000
HFPG - \$144K Grant		16,047		
HFPG - Technology Grant		15,000		
Grant Sub Total		282,897	250,000	255,000
Preservation Center				
DECD/SHPO - Preservation Center		30,000	50,000	75,000
Consultation		500	5,000	10,000
Aetna Foundation-Farmington Avenue Economic Dev.		1,000	25,000	35,000
The Hartford-Farmington Avenue Economic Dev.			10,000	20,000
1772-Revolving Fund		5,000	2,500	2,500
		36,500	92,500	142,500
Membership		6,500	7,500	7,500
Fundraising				
Annual Appeal		6,000	10,000	15,000
Awards		15,000		
Cocktail Promotion		2,000	2,000	2,000
Annual Meeting		10,000	15,000	20,000
Tours/Workshops		300	1,000	2,000
Fundraising Sub Total		33,300	28,000	39,000
Interest Income		200	300	500
Total Income		359,397	378,300	444,500
		2014	2015	2016
Expense				
Administration				
Accounting/Bookkeeping		10,500	10,500	12,500
Audit		4,725	5,000	5,000
Prof. Development/Conferences		7,500	12,500	15,000
Dues/Fees		750	1,500	1,500
Office Technology Upgrade		15,000	5,000	5,000
Office Supplies		2,000	3,500	4,000
Payroll Fees		225	750	1,000
Postage		1,200	2,000	2,500
Printing/Copying/Documentation		2,500	3,500	4,000
Rent & Utilities		16,500	20,000	22,500
Travel & Entertainment		1,800	2,500	5,000
Telephone/Internet		3,100	3,500	3,500
Administration Sub Total		65,800	70,250	81,500
Payroll				
Salaries & Wages		199,520	283,020	285,520
Health Insurance		10,000	12,500	
Payroll Taxes				
FICA		14,964	21,227	18,414
SUTA		4,988	7,076	6,138
Salaries & Wages Sub Total		229,472	323,822	310,072
Insurance				
D&O		1,520	1,600	1,750
Liability Insurance		1,525	1,650	2,000
Insurance Sub Total		3,045	3,250	3,750
Marketing				
Annual Report				
Design		5,000	7,500	10,000
Printing		3,000	5,000	6,500
Marketing Consultant		13,680	15,000	15,000
Community Education		10,000	10,000	10,000
Marketing Sub Total		31,680	37,500	41,500
Fundraising				
Awards/Annual Meeting		4,000	7,500	10,000
Programs - Other		2,000	2,500	3,500
Fundraising Sub Total		6,000	10,000	13,500
Total Expense		335,997	444,822	450,322
Net Income/(Loss)		23,400	-66,522	-5,822

Hartford Preservation Alliance Dashboard Framework
 (Will be updated regularly and further developed in implementation phase)
 (13 targets based on Strategic Plan Imperatives)

Sample Dash Board (Using Plan Priority Goals and Strategic Imperatives)	Statu s	Target	Activities/Comments
 Complete  In Process  No Action			
Multi-year strategic plan meets targets (Below are plan target highlights)			•
1. Program Goal			
➤ Hub funded and opens with evaluation tool defined and in place		Sept 2014	•
➤ Virtual tools identified and incorporated into web page		2015	•
➤ Site Evaluation Task Force convened and makes recommendation		2015	•
2. Infrastructure Goal			
➤ Staffing evaluated, job descriptions completed, staff hired and trained			•
➤ Impact measures defined; tracking/reporting tool developed			•
➤ Board Committees and Task Forces achieve goals			•
➤ New Board Members nominated/oriented (w/ skills to support Hub focus)		3 new	•
3. Branding/Positioning/Marketing Goal			
➤ Hub rebranding and support materials developed		Sept 2014	•
➤ Message Cards and Case for Support Complete		June 2014	•
4. Financial Sustainability Goal			
➤ Budget Tracks on Schedule			•
➤ New Revenues Identified			•
➤ Member grow/annual fund \$ grow; 100% Board participation			•