

Strategic Plan

The Ruthmere Foundation, Inc.

NOVEMBER 2022



Dorothy A. Johnson Center
FOR PHILANTHROPY



Dorothy A. Johnson Center for Philanthropy

The Dorothy A. Johnson Center for Philanthropy at Grand Valley State University was established in 1992 with support from the W.K. Kellogg Foundation. Our mission is to be a global leader in helping individuals and organizations understand, strengthen, and advance philanthropy, resulting in a smart, adaptive sector that helps create strong, inclusive communities.

We put research to work with and for professionals across the country and the world. Through professional education offerings; research, evaluation, and consulting services; and bold thinking to advance the field, we support a philanthropic ecosystem defined by effective philanthropy, strong nonprofits, and informed community change.

Contact Us

Tamela A. Spicer, M.A,
201 Front Ave SW, Suite 200
Grand Rapids, MI 49504
616-331-9035 // spicert@gvsu.edu
johnsoncenter.org



CONTENTS

- [Dorothy A. Johnson Center for Philanthropy](#)..... 2
- [Contact Us](#) 2
- [Introduction](#) 4
- [Executive Summary](#)..... 4
 - [Stakeholder Engagement](#)..... 4
 - [The Framework](#).....5
- [Annual Planning](#)..... 6
- [Appendix A: Action Item Matrix Format](#).....7
- [Appendix B: SWOT Analysis](#).....8

Introduction

With a deep desire to be intentional and thoughtful about how they serve the community, the Ruthmere Foundation contracted with the Dorothy A. Johnson Center for Philanthropy in the fall of 2021 to engage in the strategic planning process to ensure the continued sustainability of the Ruthmere campus. Not only did the process itself provide the Ruthmere Foundation an opportunity to listen to the community, it also allowed the staff and board of directors to explore new ideas as they envision the continued impact Ruthmere has in Elkhart County, across the Midwest, and on historic preservation in general.

The Johnson Center believes that constructing a strategic framework provides nonprofit organizations with the greatest benefits, largely because of its adaptability. A strategic framework focuses on a broad organizational vision that begins with understanding what change the organization seeks to influence in the community. Within this vision, a basic framework can be developed that will guide annual planning while providing maximum flexibility for organizations to adapt to the rapidly changing environment we now live and work in.

Through stakeholder interviews, surveys, and facilitated conversations with Ruthmere's board of directors, staff at the Johnson Center drafted a strategic framework and worked with the foundation's planning team and staff to draft short-term action plans that can be continually updated as Ruthmere and its community impact evolves. Operationalized, the strategic framework provides accountability, direction, and aspiration for the Ruthmere Foundation.

Executive Summary

The Ruthmere Foundation's board of directors selected a small committee to work directly with staff at the Johnson Center on the planning process. While the committee led the planning process, the entire board of directors, along with Executive Director Bill Firstenberger, engaged in a day-long retreat to identify key areas of impact, and begin mapping out action steps for continued growth.

Building a strategic framework to guide the continued work of the organization began with acknowledging and celebrating the impact of the Ruthmere campus in the greater Elkhart community, and as part of the broader movement of house museums across the country. The preservation of Ruthmere, the Havilah Beardsley House, and more recently the Beardsley Carriage House goes beyond simply maintaining beautiful architecture. These homes tell the story of the Elkhart community and inspire the entrepreneurial spirit that continues to influence the growth of the city.

Stakeholder Engagement

Through facilitated dialogue, the planning committee began the process by identifying whose voices needed to be included in the process. Johnson Center staff conducted 11 individual stakeholder interviews and facilitated input through an online survey that recorded 93 responses, a summary of which is Appendix A of this report. Overall, stakeholders agreed that the Ruthmere Foundation does a wonderful job as “the preserver of history for the city” of Elkhart. Several stakeholders noted the benefit of historical preservation, the architecture, and Ruthmere’s “ability to inspire others”. Inspiration and innovation were common words that came up throughout the survey responses and the interview process. Respondents consistently noted the high quality of the Ruthmere campus and the excellence of the director who is present in the community and demonstrates “a strong focus on partnerships.”

The Framework

Informed by the stakeholder input and an internal SWOT analysis (see Appendix B), the planning committee and board met in May 2022, to give voice and shape to the strategic framework. Unlike a traditional strategic plan, a framework creates scaffolding for the organization to build upon in future years. A strategic framework takes an ecosystem approach, looking not just at how the organization impacts the community, but also how that community shapes the organization. True community impact is never isolated to one organization, it is always collective. In the rapidly changing environment that we live in today, sustainable organizations recognize that collective impact and the symbiotic relationships within the ecosystem.

The Ruthmere Foundation spent time unpacking the mission and articulating a clear vision for Ruthmere. These bookends acknowledge the collective impact of the ecosystem and hold the scaffolding within which the work of the organization happens.

Mission Statement

The Ruthmere Foundation engages and inspires the community through the exploration of history, the arts, architecture, and the entrepreneurial impact in Elkhart, Indiana.

Vision Statement

Every person within our reach recognizes that Elkhart's history, as seen in the Ruthmere experience and entrepreneurial story, belongs to them.

Success Indicators

Recognizing that Ruthmere is part of a larger ecosystem, it is important to look at indicators in the broader community to understand the movement toward achieving the vision. These indicators include:

- Wide-spread community participation in arts and history organizations.
- Increased use of Ruthmere's facilities as well as new and diverse communities.
- An increased diversity of visitors to arts and history organizations.
- Increased use of research resources focused on understanding historical restoration and community history.
- Increased partnerships initiated by others in the community.
- Increased restoration of neighborhood homes in the Beardsley Historic District.
- The formation of new businesses.

Levers

While Ruthmere's board recognizes that they cannot control these indicators on their own, they are able to take action that will influence movement toward these community indicators.

The board has identified four key levers (areas of influence) and four cross-cutting levers that undergird all the work of the organization. The levers provide anchors in the framework and help focus the work as the organization engages in planning.

Key Levers

- Historic Preservation
- Education
- Arts and Culture Enrichment
- Celebrate the Spirit of Entrepreneurship

Cross-Cutting Levers

- Marketing and Community Engagement
- Human Resources
- Financial Stability
- Facilities

As the Ruthmere board and staff put these levers into action, they have identified three key priorities for the next three to five years.

Deepening the Support Structures

Sustainability requires good systems and structures to support the mission. As the Ruthmere campus continues to grow, both its footprint and influence, it's important to ensure that the backbone systems and structures can support that growth.

The organization needs to regularly evaluate the tools and resources necessary for effectiveness, as well as how best to organize the people and systems. Marketing plans, databases to support cataloguing the collection and tracking volunteers and donors, updated maintenance plans, succession plans, and board development plans are just a few of the structures and systems to consider in the near future.

Elevating and Developing Personnel

The board recognizes that the Ruthmere Foundation relies heavily on staff and volunteers to get the work of the organization done. In the current market, retaining staff is vital and attracting new talent to support growth is increasingly important. The board is committed to ensuring that the staff has access to professional development and the organization can pay market rate for the talent.

Supplementing staff talent with volunteer engagement can create greater organizational capacity. Board and staff will need to evaluate needs and draft a plan to cultivate volunteers and engage them in meaningful ways. Volunteer development includes the board itself as it seeks to better represent the community and organize itself in a way that best serves the changing needs of the Ruthmere Foundation.

Renovating the Beardsley Carriage House

The acquisition of the Carriage House opens possibilities for the Ruthmere campus. There is a desire to engage the community in thoughtful design of the space that meets the growing needs of the Ruthmere campus.

Once designed, the renovation process itself provides opportunities to cultivate new support, deepen educational opportunities, and elevate the story of the Ruthmere Foundation across the region.

Annual Planning

This framework allows Ruthmere's board of directors and staff to effectively plan as they identify priorities, set specific goals, and create action plans for each desired planning period, whether that is annually, every three years, or even nine months. By operationalizing the strategic framework with planning documents as noted below, the Ruthmere Foundation will continue to drive the mission forward while moving toward the aspired vision.

Appendix A: Action Item Matrix Format

STRATEGIES						
Strategy (overall priority and direction): Name overall strategy being planned and implemented.						
Objectives/Goals	Applicable Levers	Priority Years	Activities	Responsibility	Timing	Indicators of Success
<i>(specific results/measurable and timely)</i>	<i>(factors which we have some control over)</i>	<i>(specific time frame for objective)</i>	<i>(specific activities that will lead you to completing the objective)</i>	<i>(who or what committee will lead the charge)</i>	<i>(when should this be done)</i>	<i>(how are we measuring success)</i>
Action Item Objective Description	Define Levers	Define Years	Outline Objective Activities	Define Team Responsibilities	Activities Schedule	Define Measurables

Appendix B: SWOT Analysis

STRENGTHS

- Owns the history of Elkhart – knowledge and artifacts and being able to tell the story.
- Outstanding staff from top to bottom.
- Arts collection and the contribution to arts in the community – physical facilities of the historic homes and their importance.
- Musical performances.
- Financials are strong.
- Volunteer leadership is strong – board and family leadership.
- Building locations and the nature of the history there – being close to Wellfield and sites themselves.
- Community support – really stepped up in the last 5 or 10 years.
- Community partnerships – priority of collaborations with arts orgs and other sectors.
- Fun group.

OPPORTUNITIES

- Leadership changes in the community.
- Expand beyond Elkhart area – two-hour radius.
- Changes in the Elkhart community.
- Destination visitors.
- More with the courtyard gardens and Wellfield partnership.
- Northside of the river museum development – local arts culture and education.
- Two new property/carriage house and property next to creek house – what to use it for.
- Local Indigenous groups for a pow wow on the property – needs trust building.
- Neighborhood and its programming – historic homes in the area could be protected as part of the story.

WEAKNESSES

- Challenge in reaching broadly diverse audience – reflection of ethnic diversity in community.
- Aging volunteers and supporters.
- Motivating visitors – could be question of marketing, culture, perception, etc. – visitor numbers have plateaued – repeat visitors and new.
- Language – using the word *museum* vs. campus – more than a museum.
- Finding the programs that attract diverse ages.
- Public perception in the community – there is an assumption that the Ruthmere is a wealthy organization – lack of understanding of need.
- Community partnerships – need to be expanded and some partners are hard to engage.
- Expanding beyond Elkhart area.
- More opportunities for ongoing programming to get repeat visitors.
- “Entrepreneurial spirit” isn’t really cultivated.
- Depth of senior staff – succession planning.
- Board leadership – succession plans.

THREATS

- House museum visits are declining across the country.
- The RV industry – if it goes down it will hurt all.
- Public perception of safety in Elkhart.
- Neighborhood – historic homes/area is not necessarily protected as local or national historic district.
- Family and board leadership.
- Potential for mission creep – founding director has passed.
- Parking options in the area and renting parking lots.