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**I. PURPOSE & METHODOLOGY OF THE STRATEGIC ASSESSMENT**

The board and staff of the Rivers of Steel National Heritage Area undertook this strategic assessment to guide their near-term action agenda and lay the foundation for a new strategic plan for the long term realization of the Rivers of Steel vision. Three legislative requirements give immediate impetus to the effort:

- an opportunity to establish the Carrie Furnaces site as a national park;
- federal reauthorization in 2012 that requires an evaluation and a new strategic plan;
- continuing public funding under significantly constrained federal and state budgets.

This report therefore captures the best thinking of the board and staff about immediate priorities and the elements for a strategic plan, but does not substitute for the actual planning effort which will come later.

With the leadership of a board/staff planning team (Frank Reed and Ted Muller from the board and Angie Morini and Augie Carlino from the staff), Rivers of Steel engaged consultants (Claudia and Bill Schechter) to help the board and staff assess the issues, develop the context for a strategic discussion, and develop written products and short-term plans that the board and staff would use as a foundation for Rivers of Steel strategic planning. This report includes the assessment results, the outcomes of a one-day retreat of board and staff, and the groundwork for future planning.

Rivers of Steel solicited input through an online survey of 14 board members, 8 staff, and 13 other stakeholders (funders, public officials who manage heritage area programs at the state and federal level, and partners in Rivers of Steel programs within its eight-county region). The consultants then conducted telephone interviews to probe in more depth leadership, funder, public official, and partner view points. *(Survey and interview responses, summarized in this report, are contained in full in the appendices.)*

On 9/22/10, 20 board and staff members convened for a full day retreat focused on the short-term requisites and the foundational elements for a strategic plan – vision, mission, programmatic and organizational goals. Based upon the discussions of that day and the results of the survey and interviews, the consultants have provided Rivers of Steel with this report, an earlier two-page memo of immediate action needs, and the written notes and responses from each of these efforts, contained in the appendices. The consultants will present these findings and recommendations to the board of directors at its December 9, 2010 meeting.

## **II. CURRENT CONTEXT FOR THE RIVERS OF STEEL NATIONAL HERITAGE AREA**

Rivers of Steel has built a distinguished 15 year record of achievement with programs celebrating, enhancing and marketing the industrial history and cultural landscape of the eight counties of southwest Pennsylvania, quite literally lying along the rivers that transported the output of steel mills and coal mines -- the industrial giants of America and the communities built by those who worked for them. The assessment probed the external opportunities and challenges for the national heritage area, the internal strengths and weaknesses of the organization, and the salience of past and future program efforts. These factors will shape the goals and constraints of Rivers of Steel's next strategic plan.

### ***A. External Context (locally, regionally, and nationally)***

Influences from outside Rivers of Steel as an organization, such as geographic, economic, community and governmental factors, suggest prospects for achieving goals and identify barriers that may limit achievement. The survey and interviews explored these environmental factors with respondents.

#### **Survey and interview respondents emphasized three critical opportunities:**

- a. Rivers of Steel now controls the historic Carrie Furnaces steel mill site, has fostered legislation to make the site a national park, and thus has the opportunity to create an anchor for future programs and heritage tourism. With the site come substantial rehabilitation and maintenance obligations. The Carrie Furnaces site plays a central role in the future Rivers of Steel vision and strategies.
- b. Rivers of Steel has received support for development of "receptive services," i.e. the provision of experiences such as heritage tours to tourism packagers. Vibrant tourism is an established tool for economic revitalization as well as an opportunity for revenue generation for Rivers of Steel. The opportunity offered by heritage tourism is two-fold: mission accomplishment and revenue replacement.
- c. Respondents view increased visibility for the heritage area and recognition for cultural conservation as the third most significant external opportunity. The strategic planning effort should probe this assumption rigorously. Nationally, the past ten years have seen a growth in heritage tourism, but also a decline in attendance at purely historic buildings. Cultural conservation and educational programs that link the history of the region to its future will attract private funding, but given the loss of public funding, determining how to achieve goals efficiently and with impact will require Rivers of Steel to make difficult choices based upon available funding interests.

#### **The most critical challenges that Rivers of Steel faces now and over the next five years cited in the surveys and interviews focus on the barriers to the opportunities listed above.**

- a. Pennsylvania has benefitted from the availability of state funding for heritage conservation and restoration, along with the focus in the northeast region of the National Park Service on heritage area development. These two sources of funding suffered significant cuts in 2010, and the NPS program may not survive in the current economic climate. Rivers of Steel has relied almost entirely on these two sources for its

operations and the grant programs and technical assistance for partners. Planning for the future will have to include business revenue sources as the public purse promises to be severely limited.

- b. The birth of a new park is never easy - getting the legislation passed to create and fund Carrie Furnaces National Park faces serious economic and political hurdles. At the retreat, a board member described as a goal that Carrie Furnaces would have all the benefits of a national park designation, but with fewer restrictions. The strategic plan will have to tease out how support and revenue will be generated for the heritage area while the site is managed by the National Park Service. If passage of the legislation fails in 2010, a much longer legislative battle may face Rivers of Steel, placing a premium on contingency planning for the site.
- c. Gaining non-governmental funding and passage of Carrie Furnaces legislation in turn depend upon increasing public (and political) interest in, and support for, the heritage area. Competition for heritage tourism, usually a state area of expertise, requires Rivers of Steel to ensure a strong state relationship. The next Rivers of Steel strategic plan will need to strike a balance among historic preservation, education and cultural programs, and community development, all within funding constraints. If Rivers of Steel is vital to preserving the heritage of southwestern Pennsylvania and mentoring smaller communities within that context, then Rivers of Steel will need strategies that demonstrate its capacity to potential partners. To date, while Rivers of Steel has helped many partners across the eight counties, it has not forged an active alliance among those partners sufficient to meet the challenges of the future.

***B. Internal Operations, Management, Governance, and Funding***

Factors that Rivers of Steel as an organization can control, such as staffing, planning, programs, and fundraising, have over time built operational strengths and weaknesses that enable or constrain capacity of Rivers of Steel to exploit opportunities and overcome barriers. The survey and interviews investigated the characteristics that the Rivers of Steel managing entity, the Steel Industry Heritage Corporation, brings to achieving Rivers of Steel mission and goals.

**Strengths:**

Respondents credit Rivers of Steel with a strong, competent, and dedicated staff led by a visionary CEO. Rivers of Steel also enjoys the support of key partners and elected officials who share its vision and mission. The organization has a reputation for doing good work and adapting to changing circumstances.

**Weaknesses:**

Rivers of Steel developed a financial architecture that relied on federal and state funds for operating costs and leveraged other funds for specific projects. The dependence upon public monies has led to inadequate funding and an attendant loss of staff, eliminating the cultural staff, and curtailing Rivers of Steel's achievement. Rivers of Steel has suffered more from the loss of public funding than some other heritage areas because the organization has not built into its staff a diversified development function.

Respondents also cited lack of public awareness about the NHA and visibility for its programs as weaknesses, although these may be symptomatic of underlying causes, including the failure to develop a network among the many stakeholders the NHA has supported. The board of directors brought important expertise and balance among industry and labor to the Rivers of Steel themes and programs. However, in the face of the funding challenge and Carrie Furnaces site control, the board may need to diversify its membership further and adopt new roles, extending Rivers of Steel's access to funders and communities with a stake in the heritage area's success.

#### **Concerns and Issues Raised by Partners and Funders**

Outside stakeholders brought additional considerations to the list for strategy development. Most knew Rivers of Steel reasonably well, although a few essentially said they knew little about Rivers of Steel, "other than the organization's great reputation." The following points incorporate the concerns and advice of these external stakeholders:

Federal and state officials describe Rivers of Steel as a model NHA, competent, and a positive influence. But that praise comes with two caveats: first, the federal funding picture is unlikely to improve (and more likely to disappear, according to interviewees), and the state funding will return gradually. Thus playing a leadership role within state networks will be crucial to future support. "Rivers of Steel has done a good job and has strong local partnerships, but in the state and nationally, NHA's are in trouble." Interviewees believe the Pennsylvania program will probably bounce back, but the national outlook is dicey.

Having voiced this concern, several respondents went on to enumerate critical strategic questions for Rivers of Steel:

- Is Rivers of Steel meeting the challenges of adapting to a changed environment for NHA's?
- As one of the strongest NHA's, how will they maintain that reputation?
- How would they replace the CEO's expertise and knowledge if he were to leave?
- How will they achieve self-sufficiency and sustainability?
- What role should they play vis-à-vis other NHA's? – both on a state and federal level

Stakeholders view the large geographic area of Rivers of Steel as problematic and note that it overlaps other heritage areas. Any strategic plan must address how to achieve goals effectively within this scale and scope, and how to develop and maintain productive partnerships across such diverse communities.

An attendant concern of partners is how Rivers of Steel can be more involved in the community and gain more regional exposure, especially with local residents. Partners believe the tours have been extremely successful, but suggest that additional focal points, such as churches and libraries, are keys to greater local support. Rivers of Steel's grants to partners have been critical for community support. As those grants have depended upon state funding, how will Rivers of Steel solidify a partner network without the "grants glue"? Partners also encouraged Rivers of Steel to build strategies based upon the success of *Routes to Roots*.

What is the economic impact of Rivers of Steel? Funders and public officials focused discussion on economic effect and programs that involved people, not just improvements that preserve

sites and conserve collections. Local partners emphasized funding to promote the area, including revitalization of the 7<sup>th</sup> Avenue corridor and more business development. In the evaluation necessary for the reauthorization campaign, these partners urge Rivers of Steel to address the first half of its original legislative charge:

- (1) To foster a close working relationship with all levels of government, the private sector, and the local communities in the steel industry region of southwestern Pennsylvania and empower the communities to conserve their heritage while continuing to pursue economic opportunities;

As Rivers of Steel undertakes its strategic planning, the balance among economic revitalization, heritage tourism, and cultural preservation will have significant implications for funding.

Finally, partners asked whether it will be possible for Rivers of Steel to expand private funding. They advise that Rivers of Steel needs a stronger case for support, one that answers “what’s the end result,” specifies outcomes for the community, and tells a story that has multiple parts. The funding for conservation and preservation has to bring community benefits beyond the bricks and mortar. Several funders believe that Carrie Furnaces’ use – and price tag – will influence whether or not Rivers of Steel's case can compete with other significant efforts in the region. They are skeptical that a price tag in the millions will be attractive unless there is a strong case for regional economic benefits.

**For the planning effort:**

Key questions to answer in the strategic plan:

1. What will the balance be among the goals and how will that change over time, given current funding constraints?
2. What is the role for Carrie Furnaces? What are the alternatives if Carrie Furnaces is not designated as a national park site?
3. How do we define our impact in the eight-county area? Does it differ geographically? By community? What is our “offer” to communities? Can we have an impact on the region’s economics and if so, how do we plan to do so?
4. How do we select partners and what is our “offer” to various partners? What does Rivers of Steel expect from its partnerships? Is our small grants program essential? If so, how will that be funded?
5. What is our goal for our funding architecture? How will we research the feasibility of meeting that goal? What business plan is needed to include heritage tourism and use of buildings as sources of revenue for Rivers of Steel?
6. What screens or criteria will be used to determine viable programs? Is funding availability a decisive factor along with mission relevance? Might funding become the primary factor in certain circumstances?
7. How will visibility be defined and then integrated into every Rivers of Steel activity?

*(For more detail, see the online survey form, results and summary, as well as the summary and themes of interviews documents in the appendix.)*

### III. KEY STRATEGIC TOPICS FOR THE RETREAT

#### ***A. Board & Staff Expectations for the Retreat***

Based upon the survey assessment and interview questions regarding important outcomes for the retreat, board and staff members expressed specific concerns associated with both the external environment and the internal structure. The paragraphs below discuss those points made by a majority of board and staff members. The list will play a dominant role in the goals and strategies selected in the plan.

1. Rivers of Steel needs a new vision given Rivers of Steel's achievements, a changed environment, and control of Carrie Furnaces. As one member said, "we need to establish a vision of what we want Rivers of Steel to be and increase the commitment of board members to achieving that vision. We need to decide where we are headed and define our goals." Board and staff members laid down the following requirements for a new vision:
  - a. define the role of Carrie Furnaces,
  - b. strike a new balance between 'industrial' and 'cultural' initiatives and programs, including what may be subsidized by other efforts,
  - c. recognize the interrelatedness of the mission elements, and
  - d. energize partners and new support.
2. Rivers of Steel has helped many organizations, but not woven a sustainable network of "partners in action". Strategies for partnerships might address the following in the plan:
  - a. Closer collaboration with related organizations, especially in Fayette and Greene Counties.
  - b. A merger or closer working relationship with the National Road heritage area.
  - c. Working with viable partners to achieve cultural conservation goals, thereby meeting community expectations in difficult circumstances with leverage.
  - d. Engaging local governments and industry-labor partnerships more prominently in providing support and visibility.
3. The board and staff need consensus on "where to go with the Carrie Furnaces site." Rivers of Steel is glad to have control of the property, but with that comes pressure for clarity about its financial, strategic, and staffing implications. Should Rivers of Steel commit wholeheartedly to the original plan to restore Carrie Furnaces? Given the cautions from partners and funders, are there alternative levels of restoration for Carrie Furnaces? The amount of funding to maintain facilities and staffing for Carrie Furnaces is immense. How realistic is private funding? Is Rivers of Steel ready to restart the paused capital campaign now or are there prerequisites? What are the specific consequences if Carrie Furnaces becomes a national park? How would it be managed, especially in relation to other NPS units in Western Pennsylvania?
4. The plan should address structure, turnover and succession for both Rivers of Steel staff and board:
  - a. The board should use its renewal practices (term limits) to gain new members who expand access to financial and public support, and achieve geographical representation.



- b. The board has advised the growth that has taken place to date. But this environment requires decision-making, not counsel. In that light, the board might examine its committee structure to align committee efforts with action priorities and rework its agendas to facilitate decisiveness.
  - c. Revenue generation will require business expertise that may challenge the staff's administrative and financial capacity. How will Rivers of Steel integrate business planning and management into both its strategies and its revenue sources?
  - d. Absence of a long-term sustainable development function has resulted in vulnerability against long odds given the economy, government revenue problems, and the pressure on the National Park Service to define the life expectancy for heritage areas. Good fundraising requires board commitment as well as a substantial case for Rivers of Steel that meets private funder interests.
  - e. Finally, Rivers of Steel board and staff need to consider strategies and outcomes for regional/geographic representation; racial and gender diversity reflective of the regional communities; and how to parlay the industry/labor partnership potential at the board table.
5. A successful strategic plan will define funding needs, sources, and uses. Board and staff cite diversifying funding, learning to live within limits, and expecting Carrie Furnaces to increase public and private funding as core principles in developing a sustainable financial base. First, Rivers of Steel must develop sustainable revenue sources, perhaps setting as a target equal to the federal funds of the past. Receptive services (supplying venues and experiences to the heritage tourism markets) are viewed as a prime alternative, but how does this resource align with mission? What other revenue generating sources might come with Carrie Furnaces? As the year-to-year anxiety around federal funding intensifies, how sparse are non-public sources? The strategic planning effort should also assess the following donor sources for their long-term viability:
- a. reviving a capital campaign,
  - b. achieving reauthorization,
  - c. building a reserve fund,
  - d. seeking foundation funding,
  - e. increasing donor base, and
  - f. involving some surrounding communities.

Because Rivers of Steel has never had a significant development effort, the strategic plan will need to assess the climate and access available for contributions of all kinds.

**B. The Goals and Agenda for the Retreat**

Based on these suggestions and expectations, these were the goals for the retreat:

- Identify where we have been, where we are today, and where we want to be in the future.
- Prioritize the critical tasks for meeting our immediate challenges
- Lay the groundwork for a new five year strategic plan.

The outcomes of the retreat are covered under the relevant topics in the rest of this report.

*(The agenda, PowerPoint slides, worksheets, handouts, finance factsheets, and transcribed notes from the retreat are included in the appendix to this report.)*

#### **IV. VISION OF RIVERS OF STEEL IN TEN YEARS**

Presently Rivers of Steel has no vision statement describing what will result from its future mission actions. That statement will be a critical outcome of the strategic plan, engaging board and staff, partners and funders, public officials and community citizens in the effort because the results will matter. A clear description of desired success will also help in making the difficult choices among its opportunities and within its constraints.

**A. At the retreat, four tables each outlined a vision statement for Rivers of Steel.**

**Table 1 Vision: Connect the Dots**

- Recognition of historic sites
- Recognition of cultural heritage
  - Recognition of Rivers of Steel as catalyst: physical (tangible assets, infrastructure) and programmatic (intangible assets)
- Recognition of the heritage area region as a destination
- Brand

**Table 2 Vision: We're not dead yet!**

- Eliminate assumption that steel manufacturing is dead in this region
- Steel's past is the path to the future
- Integrate into the present and the future:
  - Utilize institutions to interpret our past
  - Show continuity of past, present, and future manufacturing at Carrie Furnaces
  - Advocates for steel – leadership position
  - Packaging heritage, present, and steel's future

**Table 3 Vision: Carrie Furnaces as a Portal**

- Have a central focus/anchor/portal (Carrie Furnaces) linking local & regional sites with Rivers of Steel brand
- Visitor & Education building at Carrie Furnaces:
  - Dedicated Marketing Director AND Development Director
  - Tourism is central to all programming: educational, cultural, interpretive
  - Income-producing programs & facilities
  - Willing to travel throughout heritage area
- A branded model

**Table 4 Vision: Heritage Matters**

- Branded steel story (well-defined)
  - Rivers of Steel as an institution/staple in related community/regional events
  - Museum of Industrial History
- Heritage Tourism (physical & virtual)
  - Well-developed regional heritage tourism brand
  - Well-developed recreational ties – e.g. Great Allegheny Passage, et al.
- To achieve – strong marketing in all incarnations
  - Goals achieved = funding success



**The four statements contained several common elements:**

1. a celebration of and strong educational programming about the region's broader industrial stories,
2. links that connect people to the assets of region,
3. Carrie Furnaces as a central physical presence and a hub for other sites and programs,
4. regional and national recognition for the Rivers of Steel brand and story, and
5. vibrant partnerships.

***B. Proposed Vision Statement for Discussion, Revision, and Adoption***

In the survey, interviews and at the retreat, board and staff members agreed on the elements, if not the wording, of the following vision statement:

A restored Carrie Furnaces national park site embraces and celebrates the heritage and future of the steel industry and the communities built by steel workers. With Carrie Furnaces as anchor, Rivers of Steel has become a recognized brand for the heritage of steel, a regional destination that people across the nation come to experience, and a connection of people with cultural history. The heritage area enjoys a sustainable financial future and through partnerships with organizations, funders and communities, has preserved more and more of the cultural and physical heritage of its eight-county region. Rivers of Steel educational and cultural programs help younger generations understand work and industry, through the legacy of the past and the use of our industrial heritage to drive our future. Rivers of Steel has contributed to community revitalization through heritage tourism, business development around the Carrie Furnaces site, and preservation programs.

**For the planning effort:**

The next step for the Rivers of Steel board and staff – helpful for any contractor conducting the strategic plan and for advocacy and development efforts – is to agree on a final vision for the end result of next 10 years' of effort. There is sufficient agreement and detail in the common elements and the ideas in this section to complete this task within 2-3 months.

*(For more detail, see the notes transcribed from the flip charts and worksheets from the 9/22/10 retreat in the appendix.)*

## V. THE MISSION OF RIVERS OF STEEL

The Rivers of Steel National Heritage Area has a legislative mission, but long before that its founders had a broader mission in mind. During the retreat, board and staff reviewed the mission as it stands today and recommended several changes.

### A. Mission Statements

#### According to the National Park Service:

“Committed to protecting and promoting the cultural, historical and natural assets of a region, National Heritage Areas play a vital role in maintaining both the physical character and the cultural legacy of the United States.”

#### As described in the Rivers of Steel authorizing legislation:

“The objectives of the Steel Industry American Heritage Area are— (1) to foster a close working relationship with all levels of government, the private sector, and the local communities in the steel industry region of southwestern Pennsylvania and empower the communities to conserve their heritage while continuing to pursue economic opportunities; and (2) to conserve, interpret, and develop the historical, cultural, natural, and recreational resources related to the industrial and cultural heritage of the seven-county region of southwestern Pennsylvania.”

#### As stated by Rivers of Steel on its website:

(underlining emphasizes the active mission statements)

“The Rivers of Steel National Heritage Area, comprised of eight counties in southwestern Pennsylvania, encompasses the greater Pittsburgh area and the Monongahela, Allegheny and Ohio River valleys. For more than a century, this area was known as the "Steel Making Capital of the World" and the dynamic and powerful story of Big Steel is preeminent in the region's artifacts, buildings, historic communities, industrial sites, and the living cultural traditions of its people.

Created by an Act of Congress and the Commonwealth of Pennsylvania in 1996, the Rivers of Steel National Heritage Area is managed by the non-profit Steel Industry Heritage Corporation (SIHC) in partnership with the National Park Service and the Commonwealth of Pennsylvania. SIHC works with communities throughout the region to identify, conserve, promote and interpret the cultural, historic, recreational and other resources associated with steel and steel-related industries.

The goal of the Rivers of Steel National Heritage Area is to use these resources to encourage community revitalization through cultural tourism, historic preservation, natural and recreational resource conservation, cultural and educational programs and related economic development. Since its inception, Rivers of Steel National Heritage Area has undertaken projects in the region using public and private funds for the National Heritage Area.”

#### **At the retreat, board and staff agreed on three important changes.**

First, a reworked mission statement should be more focused, defining within the broad legislative mandate the “We do this by . . .”, or as one said, concentrate on who we are and what we do. In setting forth a laundry list of activity, the sharpness of the vision gets lost.

Second, the mission sounds so generic that the sense of personal connection, of people, with Rivers of Steel as a catalyst for connections is lost.

Finally, members felt the mission emphasized the past and should explicitly include the present and future.

Closely allied with a straight forward mission statement is a brief menu that sets the scene, as paragraph one above does, and gives more detailed bullets about key strategies to achieve mission. As with the vision, sufficient progress was made on the changes needed in the current mission statement so that the board and staff should be able to have a working draft of the basic statement for the strategic planning effort.

**For the planning effort:**

The next step for the board and staff of Rivers of Steel (and helpful for any contractor conducting the strategic plan and for advocacy and development efforts) is to agree on a final revision of the Rivers of Steel mission. There is sufficient agreement and detail in the common elements and the ideas in this section to complete this task within 2-3 months.

*(For more detail, see the retreat notes in the appendix.)*

<b>VI. AGREEMENT ON ACTION AREAS AND PROGRAM GOALS FOR STRATEGIC PLANNING</b>
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The strategic planning requirement necessary for reauthorization offers Rivers of Steel the opportunity to redefine its overall goals and clarify the results the organization will achieve. This effort comes at an ideal time, as Rivers of Steel has not conducted “business as usual” this past year and the loss of federal funding has highlighted the need to rethink what is critical, what is possible, and what can be funded in the future. At the same time, Rivers of Steel has before it an opportunity that it has worked hard to achieve: control of Carrie Furnaces and the opportunity for the site to become a national park. This section lays out the results of the surveys and interviews, reviews the program brainstorming at the retreat, and then discusses core topics for consideration in developing strategies.

***A. Survey Responses Dealing with Strategies, Program Areas, and Initiatives***

The survey asked respondents to assess the strategies Rivers of Steel has implemented to carry out its mission over the past 10 years and then evaluate which may be most important for future activity.

**Respondents graded Rivers of Steel's past performance on the five major strategies, goals, and program areas:**

<i>Rank</i>	<i>Strategy</i>	<i>Grade</i>
1 <sup>st</sup>	Preserving historic resources	A-
2 <sup>nd</sup>	Communicating the stories of the region	B+
3 <sup>rd</sup>	Sustaining cultural traditions	B+
4 <sup>th</sup>	Stimulating economic development	C+
5 <sup>th</sup>	Developing recreation and natural resources	C+

**Asked to look ahead to the next five years, respondents re-prioritized the program areas:**

- 1<sup>st</sup> Preserving historic resources
- 2<sup>nd</sup> Stimulating economic development
- 3<sup>rd</sup> Communicating the stories of the region
- 4<sup>th</sup> Developing recreation and natural resources
- 5<sup>th</sup> Sustaining cultural traditions

**The priorities carry through to respondents' assessment of how critical Rivers of Steel's key programs are to achieving its mission.**

- 1<sup>st</sup> Heritage tourism development & marketing
- 2<sup>nd</sup> Advocacy
- 3<sup>rd</sup> Education and interpretation
- 4<sup>th</sup> Cultural conservation, traditional arts & folklife
- 5<sup>th</sup> Technical assistance to communities

When asked what programs might be dropped, a few respondents listed the last two, but this was a small minority of answers. Tourism and marketing, and educational and interpretive programming were mentioned for expansion. In general, the survey results give little guidance on specifics, beyond the overall increased emphasis on activities with economic outcomes.

However, when asked to give three centerpiece goals for the strategic plan, consensus was quite clear among all the respondents:

- Carrie Furnaces and all its implications – physical and programmatic – claimed universal attention.
- Tourism promotion as tool of economic development was cited second. A number of answers said Rivers of Steel's goal should be to become a model of heritage tourism.
- Finally, the development and diversified use of buildings and physical sites featured as the third critical action area.

In this section asking for core goals, a number of responses included Rivers of Steel becoming more sustainable and less dependent on federal funding. The overwhelming experience of the past year's contraction clearly influenced the choice of core goals.

***B. The vision and mission discussions at the retreat modified and clarified goal priorities for the strategic plan.***

Board and staff identified the following four key action areas and within each identified or brainstormed specific tasks with a time indication of short, medium, and long-term. These areas coincide with, but also expand the three core goals from the survey and interviews, particularly the addition of a marketing goal, and the charge to rebuild cultural and educational programs.

The contrasting rank given cultural and educational programming in the surveys versus at the retreat presents a core strategic challenge for Rivers of Steel. First, the cultural staff were the community organizers for Rivers of Steel; their loss undercuts the capacity to strengthen an advocacy network for the organization. But more important, the loss signals the need to develop a very different funding structure which will depend much more upon the interest of funders. Rivers of Steel has used its public funding to leverage private funding for projects,

without developing direct sources of private funding for its staffing and operations necessary to achieve these projects. Without public funding, Rivers of Steel not only loses the leverage aspect of its financing pattern, but also will now have to share control over what projects to undertake.

**Carrie Furnaces**

- Advocate for the Carrie Furnaces site -- press Carrie Furnaces legislation with local leaders and build a coalition to get legislation passed. (S)
- More fully develop Carrie Furnaces Tours with volunteer, earning immediate income (S)
- Define the central role (S) and a management plan for Carrie Furnaces (M).
- Develop Carrie Furnaces and the W. A. Young sites. (M/L)

**Rebuild Cultural & Education Programs, Services, and Events**

- Hold steel worker reunions to generate interest (S)
- Develop winter heritage workshops (via oral history, storytelling, genealogy, etc) and partner with county tourism agencies to provide the workshops in all counties (S/M)
- Create a yearly Rivers of Steel festival, e.g. Joe Margarac Festival (S-M)
- Create/increase educational programs for schools at all levels (S-M-L)
  - Develop an industrial history musical to be produced by high schools (S)
- Create exhibits (temporary/traveling) to involve communities, etc. (L)

**Visitor Facilities and Services**

- Build additional infrastructure: visitor center, museum, tour center
  - Develop more exhibit space throughout the Bost Building – more museum-like (S)
  - Create specific research and educational rooms (M)
- With Carrie Furnaces as hub, identify key sites (old and new) to link hub and spokes, i.e. develop Carrie Furnaces tours to work as a hub for other sites
  - Develop a “Cradle of Creativity” tour showing all the ideas that spawned the industrial revolution around Pittsburgh
  - Expand tours in other areas of Rivers of Steel
  - Develop tours showing both the past & future of steel making (include tour of working mill)
  - Develop diverse tours at Carrie Furnaces, i.e. eco-tours, art tours
- Build a system for access to Rivers of Steel sites by walking, biking, bus, and boat
- Assist in promoting a labor history/present/future trail in Homestead, Braddock, and McKeesport (M)
- Partner with Homestead Revitalization, create Homestead Heritage Walks as the local heritage story promotes our regional story and Rivers of Steel has a positive public face (M)

**Market Events and Tourism**

- Brand and successfully tell the Rivers of Steel story – via all marketing incarnations (media, social networking, heritage tours)
- Hire a director of development to complement the marketing specialist (S)
- Develop a strong marketing plan and tools (S/M/L)

- Market heritage tourism with regional partnerships and regional identity (S/M/L)
- Create a marketing tool for Rivers of Steel, e.g. annual report (M)
- Enhance media services: website, advertising/brochures, press releases (L)
- Work with the American Automobile Association (AAA) to market heritage tourism (L)

***C. For the planning effort:***

In summary, the surveys and the retreat discussion highlight core topics for goal statements and strategic development in the Rivers of Steel plan:

1. Carrie Furnaces' role, use, restoration alternatives, visitor service facilities and revenue opportunities are central to the plan. There is general agreement that the site will act as an anchor and a hub, made perhaps more certain if the site is included in the National Park system. Beyond that agreement Rivers of Steel has much strategic thinking to do.
2. Heritage tourism will play a much more prominent assignment in Rivers of Steel's next ten years. As an incentive and funding mechanism, tours and heritage experiences may help rebuild the cultural and educational programs. Receptive services revenue may offer the best substitute for federal funding while attracting local and regional support. Clearly there is strategic synergy between Carrie Furnaces as a starting point for a wide variety tours and personal heritage experiences and the desire to include the entire region.
3. In straightened circumstances, Rivers of Steel will have to approach its programmatic dreams selectively. The discussion and survey answers make clear that priorities have shifted because the economy and the uncertainty of continued federal and state support has forced a shift. Rivers of Steel will need to devise alternative ways to achieve goals that were readily funded in past years through the grant program and relied on staff expertise. And if Rivers of Steel wants a more focused mission approach, then program strategies must reflect that focus.
4. Plans for bricks and mortar – the use of structures and sites – will play a larger role in the coming ten years, but with heavy financial demands. Funding for buildings comes via two major avenues, governmental funding (local, state, and federal) and capital campaigns, which rely heavily upon major donors and broad public support.
5. Marketing will become a more prominent core competency for everyone on the staff. The shift in funding mechanisms will force more attention on promoting the Rivers of Steel brand and case. In past years, Rivers of Steel has had the financial wherewithal to be both program expert and financial partner. The shift in emphasis will be challenging for both staff and board. Assessing what this means for Rivers of Steel is essential to a successful strategic plan.

*(For more detail, see the detailed survey responses, interviews summary, and retreat notes documents in the appendix.)*

**VII. STRATEGIC PLAN IMPLICATIONS FOR FUNDING, STAFF, BOARD, AND PARTNERS**

Over the past 10 years, in very simplified terms, Rivers of Steel has organized its internal structure using National Park Service funding for its staff, with emphasis on programmatic staff, and state funds to leverage partnerships and grants. The Rivers of Steel board has provided guidance and advice, but overall has not played the traditional non-profit board role of opening doors and helping raise funds. As Rivers of Steel contemplates the next 10 years, both of these circumstances will change dramatically.

This section lays out the results of the survey and interviews regarding Rivers of Steel's internal operations and its partnerships. The section summarizes the outcomes of discussion at the retreat about implications in four organizational areas: funding and fundraising, staffing, governance, and partnerships. The section then identifies core topics for consideration in developing strategies. The next section addresses long term strategies and the following section presents the short-term action planning tasks.

***A. Assessing Internal Operations and External Relationships (from the online survey)***

**Organizationally, respondents graded our current performance on these components:**

1 <sup>st</sup>	Management and administration	B+
2 <sup>nd</sup>	Finance and accountability	B+
3 <sup>rd</sup>	Program implementation	B+
4 <sup>th</sup>	Planning and program development	B
5 <sup>th</sup>	Communications and outreach	B-
6 <sup>th</sup>	Governance and succession planning	B-
7 <sup>th</sup>	Assessment and evaluation	C+
8 <sup>th</sup>	Fund raising	C+

**On external relationships respondents grade the performance on these criteria:**

1 <sup>st</sup>	Partnership with public sector (government)	B+
2 <sup>nd</sup>	Partnership with non-profit sector	B
2 <sup>nd</sup>	Citizen and key stakeholder involvement	B
4 <sup>th</sup>	Partnership with private sector	B
5 <sup>th</sup>	Balance of effort across the 8 county region	B-

Participants in the planning retreat built on these assessments, addressed the four major components of internal operations and external relationships, and offered suggestions and recommendations for each, in both the strategic plan and in the shorter term.

***B. Implications for Fundraising and the Sources and Uses of Funding***

**Sources of Funds:**

Rivers of Steel earlier in its evolution had made strategic decisions to limit fund-raising from local governments, workers, or foundations. Thus it has not developed a staff capacity for raising private sector contributions and sponsorships. Similarly, fundraising events have not been a significant part of the revenue mix. The exception is the grant to develop revenues through "receptive services" for heritage tourism.



Given the economic climate of the region and the public funding enjoyed by Rivers of Steel, these decisions made sense when they were applied. Now, two factors drive a change:

- To gain reauthorization and meet the emerging definition for national heritage areas, Rivers of Steel will need to demonstrate financial sustainability beyond federal and state funding. There is some movement toward defining this as viability without federal funding, but that requirement is unclear.
- Public funding will return gradually, if at all, during the next ten years. If Carrie Furnaces becomes a national park site, there will be planning and operations funding for the site, but if not, Rivers of Steel will need to raise private funds for the site, in addition to determining how to support current programs.

At the retreat, board and staff members agreed on the following strategies for the Rivers of Steel funding architecture in the future.

- All agreed to work to keep state and federal dollars in the mix, to the maximum extent possible, but with the understanding that these funds will no longer cover all operations and programs.
- Rivers of Steel will use revenue generating opportunities for business development, including receptive services for heritage tourism and service and tourism revenue from programming, as a major source of income in the future. Business revenue will include rents or other income from buildings. This will have staffing implications and will require business planning as part of the strategic plan effort. The board will look to determine what other businesses Rivers of Steel should expand to, recognizing that today Rivers of Steel has a grant to expand its receptive services development so that will demand priority for staff time.
- Rivers of Steel will enter the fundraising arena, beginning with foundations and corporate sponsors which may be a good match to programs. This requires immediate development expertise, as well as cultivation. The board and staff will start working on building relationships with new funders. A development staff (paid or volunteer) will help the staff sort out how much of program costs can find funder “homes.”
- Rivers of Steel will develop “retail” fundraising gradually, building an individual donor base, including major donors, and events that are held specifically to net funds.

### **Uses of Funds:**

The annual amount necessary to maintain present operations totals \$1.1 million. Asked what Rivers of Steel needs in 2011, the group listed operations funding, a reserve target and strategy, a fundraiser on staff, and increased business revenue. An immediate investment is required to fund the expertise and to create the materials. Successful foundation and corporate sponsorships require a staff matrix involvement to build relationships with funders; each staff person has a role with funders as well as development director. In addition, a major element of board members’ time will need to focus on opening doors and creating access to resources.

### ***C. Implications for Staff***

The survey, interviews, and retreat discussions identified staffing gaps that need to be addressed in the short term. The strategic goals will require longer term adjustments to the Rivers of Steel staffing plan, particularly in the inclusion of business and fundraising capabilities.

A development “staff” is an immediate priority. Finally, the board must determine if, how, and when to rebuild the cultural/education capacity; build back community outreach and education; and attract volunteers as a means of expanding staff capacities.

***D. Implications for the Board of the Steel Industry Heritage Corporation***

Retreat participants also applied the strategic planning considerations and constraints to the board, identifying changes that are needed to manage the short-term demands and accomplish the long-term goals. These include the following:

**Short-term management of demands:**

- Focus the board meetings and committee time on accomplishing the immediate needs in legislation, funding, and planning.
- Develop a committee to oversee housekeeping issues, like evaluation and financial reporting.
- Have board members visit Congressional delegations, other NHA’s, partners, and constituents.
- Use the elevator speech: be advocates/ambassadors for Rivers of Steel

**Longer-term changes:**

- Develop agendas and committee structure that facilitate more strategizing, more goal setting & actions, and planning for the future.
  - Concentrate on direction, oversight, accountability, and fundraising
- Adopt a board job description that includes opening doors and creating funding results.
  - ✓ Diversify Rivers of Steel's board connections: funding/fundraising, marketing, access, and tourism.
  - ✓ Every board member should be a financial supporter, making a personal commitment that is comfortable financially.
- Broadened board membership, both in expertise needed, industry, and geography
  - Expand board to have representation from the manufacturing industry & fundraising expertise
- Succession planning for staff and board

***E. Implications for Partners and Partnerships***

In considering ways to make partners more aware of Rivers of Steel's immediate needs and include partners in the strategic decisions to be made, retreat attendees made the following suggestions:

**Short-term partner involvement:**

- Improve our communication with partners, making it more frequent (i.e. monthly breakfast) to engage partners and inform them of what Rivers of Steel is doing – always exchanging information.
- Host a luncheon with the local political figures, to explain Rivers of Steel's opportunities and challenges and solicit strategic input.
- Develop a strong National Road/Rivers of Steel partnership.
- Develop new relationships with current industry for funding and exhibition materials.

- Find a way to help the partners as they go after funding; Rivers of Steel needs to market partners.

**Longer-term partnership goals:**

- Develop a plan to expand partners that are “missing from the table” as a section within our strategic plan.
- Make contact with the various school districts for ongoing educational programs.
- Define in the strategic plan what it means to connect communities to their cultural heritage, including how to build community outreach and engagement that is effective in achieving Rivers of Steel’ goals.
- Develop strong NPS/Rivers of Steel joint programming and facilities planning.
- Investigate mergers/relationships with other non-profits with similar missions.

***F. For the planning effort:***

The strategic plan will have organizational components that address staffing and funding requirements, and hopefully will address partnerships as a key mechanism for mission achievement. The retreat discussions suggest that board structure might also be addressed, but the board may want to address its structure and work methods well before the plan. The items listed as short-term should be included on board or committee agendas within the next 6 months. The next section overlaps this one, as it sets forth the short-term planning done to address the immediate legislative and funding needs.

*(For more detail, see the survey responses, interviews summary, and retreat notes documents in the appendix.)*

**VIII. PRIORITIZE THE CRITICAL TASKS FOR MEETING THE IMMEDIATE CHALLENGES**

Finally, the retreat participants addressed critical requirements from four immediate challenges facing Rivers of Steel in the near term, including:

- Evaluation (overdue; needs to be completed by 2011)
- Reauthorization (current Congressional authorization ends in 2012)
- Status of Carrie Furnaces legislation (and contingencies in the interim)
- Funding to support current programs, staff, and facilities

The group set priority tasks for each of these challenges over the next 24 months.

***A. Evaluation:***

After the retreat, the board members authorized Augie Carlino to contract for an evaluation immediately. The evaluation is a Congressional requirement for the National Park Service, but unfunded as of today. However, Congress will not reauthorize an NHA without an evaluation. Therefore, Rivers of Steel will fund its own independent evaluation of its achievements.

<u>Evaluation Schedule:</u>	<u>Due</u>
1. Explanation of evaluation requirements	Now
2. Make a decision on evaluation process	9/2010
3. Secure funding	11/2010
4. Write RFP (draft is now written)	12/2010
5. Select contractor	1/2011
6. Conduct credible/objective evaluation	8/2011
7. Report to Congress	9/2011

***B. Reauthorization:***

The legislative authorization for Rivers of Steel ends in 2012. Usually, an end to authorization stops any funding. In the appropriations process, through earmarks, funding can be reinserted through temporary extensions of authorization, but that road becomes increasingly difficult under the current budget scrutiny. Participants agreed that reauthorization was essential, and given the short time frame, a top priority for a task force. The topic group identified four action items, which remain to be assigned.

Reauthorization may take place on a heritage area by heritage area basis, but Rivers of Steel must also consider the possibility that the program may be eliminated. Preparing for this possibility will involve collective action with other areas as well as meetings with Congressional supporters to explore alternatives.

Re-authorization (It takes a village)

1. Develop the case: "The Rivers of Steel Story"
2. Assemble a strong case: effective story-telling = effective story ownership
3. Build a coalition: build and develop vested partners (current)
4. Create new partners: identify and cultivate new, but potentially vested, partners
5. Enhance political connections: build new ones, strengthen current ones

***C. Status of Carrie Furnaces legislation***

The Carrie Furnaces bills (H.R. 5500 and S. 199) have been referred to the appropriate committees, but no further action has taken place. Given the agenda already before the 2010 post-election Congressional session, an omnibus parks or public lands bill proposed earlier is most likely a non-starter. Prospects for any parks legislation in the next Congress are dim, but not impossible. Rivers of Steel needs a coordinated task force effort to address the Carrie Furnaces legislation along with reauthorization. The potential outcomes are included below:

1. We now know that legislation will not pass in the December lame duck Congressional session. Therefore, our strategy may have to shift to a focus on incorporating Carrie Furnaces into an omnibus National Park Service (NPS) bill.
2. If legislation passes, the NPS will need funds for preparing a management plan (a 2-3 year process) and for staffing/partnership (in the meantime).
3. Until NPS owns site, Rivers of Steel should be the management entity under a cooperative agreement with NPS. Rivers of Steel should plan now for safety improvements, programming, and development partnerships.
4. If legislation does not pass, Rivers of Steel will need funds and new partners for safety improvements, programs, and a management plan.

***D. Funding to support current programs, staff, and facilities***

Rivers of Steel faces a budget shortfall in the 2011 fiscal year of \$100,000 on an operating budget of \$1.1 million. This is after the severe staffing cuts and elimination of the grants to partners that took place in the current year. Therefore, the immediate short term goal is, first, to fund the gap, and second, to achieve that and increased funding, to fund a development function. A fundraising task force began to form at the retreat, and the notes below capture the start of its planning.

1. *Start building relationships:*
  - Foundations: Heinz, McCune, Forbes Funds
  - Corporations: US Steel, utilities, Allegheny Ludlum, hospitality business (hotels, restaurants, tourism, bus owners, et al.)
  - Labor Unions: Steelworkers
  - Individuals
  - Expand earned revenue like tours
2. *Retain a person dedicated to fund raising/development.*
  - Could be someone who is retired, but has had major fundraising responsibility
  - Bring on board in early 2011

At the close of the retreat, the planning team asked the facilitators to provide a document addressing preliminary observations from the retreat and recommendations for next steps. A revision of that document follows this section and incorporates many of these short-term planning items.

<b>IX. NEXT STEPS FOR STAFF AND BOARD: ORGANIZING FOR ACTION</b>
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Rivers of Steel faces a compact two years of extraordinary action – two legislative undertakings, on-going appropriations requests, an evaluation, and a management/business plan that can carry the legislative battles, let alone secure additional private funding. At the retreat, board and staff together identified quite clearly the tasks that, in a sense, have come due.

If one makes the assumption, as we do, that Rivers of Steel needs the federal legislation and appropriations over the next ten years to realize its promise for the region, then the board and staff need to reorganize their priorities to meet these demands, while maintaining a stable base of programs that continue to fulfill community expectations.

***A. Suggestions for moving beyond “business as usual” for the next six months include:***

1. The board needs to meet monthly for the next six months with the focus being “how will we organize ourselves to achieve our immediate goals?” Each meeting has to count – reaching decisions and assigning joint implementation responsibilities, and thus staff should work alongside the board. This will somewhat relieve Augie as the hub through which all spokes connect today. The executive committee can address the fiduciary oversight needs.
2. First, rethink the annual work plan and budget for the coming year to emphasize the tasks and the funding needed to complete the evaluation and hire a fundraiser, as well as realign existing staff to critical assignments.
3. At the December meeting, task forces of board and staff should walk away with implementation assignments, with progress reports evaluated monthly. Four task forces could cover the needs without fragmenting efforts. At this December meeting, charter task forces for funding, advocacy, strategic planning, and short-term work plan and budget. The advocacy task force has 4 assignments: Carrie Furnaces legislation (aim for an omnibus bill in 2011 or 2012), 2011 appropriations (time line – end of 2010), 2012 appropriations (time line – end of 2011), and reauthorization (time line – end of 2012).
4. A funding task force began to form around Ellen Kight and Moe Coleman at the retreat, along with staff members Jeff Leber, Ron Baraff, and Sherris Moreira. Augment this group immediately with at least two additional board members and invest the group with the charter to find development ‘staffing’ and write the case statement for ‘wholesale’ fundraising.
  - a. Stay away from ‘retail’ fundraising (e.g. individual membership, events) for now unless it’s done for you by a partner institution (e.g. the Steelworkers could include an appeal in a mailing to all its members and retirees, paying the mailing cost, for \$10 on October 13 to take advantage of the match). River of Steel has neither the base nor the operational cash to support such efforts.
  - b. Begin to cultivate corporate and foundation resources immediately.
  - c. Continue an emphasis on revenue generating enterprises. When you hire long-range planning expertise make sure you receive a business plan, not just a general management plan. The National Park Service does not know how to develop profitable businesses.

5. With regards to the evaluation, why not simply negotiate with Westat to begin immediately, using the logic model they have developed, perhaps augmented by Rivers of Steel? The evaluation would have high validity with the National Park Service and Congress, and it's ready to go. (Try to purchase it for less than \$100,000.)
6. With regards to the Rivers of Steel grant program, consider how to gain even modest funding for 2011 and how to restructure the program so that a useful network for advocacy and branding gets developed. How will sites, trails, and events become "designated" as part of Rivers of Steel? What's the reciprocal package/offer? Lessons from other National Heritage Areas and the Chesapeake Bay Gateways Network are relevant here.

***B. What are the relevant topics for the coming board and executive committee meetings?***

1. In your first 2011 meeting, discuss the reorientation needed in work plan and budget, to give the staff guidance. If needed, adopt an amended budget. Also, fund a development capacity for Rivers of Steel.
2. In your second 2011 meeting, address the question about Carrie Furnaces' central role. \$100 million is a very big number that doesn't sit well with today's economic priorities if it is invested entirely in bricks and mortar.
  - a. Develop a realistic timeline for formation of the national park (designation, assessment, real estate transactions, general management plan, etc.)
  - b. Develop guidance for a capital budget for protection and a realistic approach to renovation over a 10- to 20-year period.
  - c. Develop a vision for Carrie Furnaces as a hub today, even in disrepair, tied to the language in the designation. If \$100 million is the number, Rivers of Steel will need to develop the case statement for how that amount will be invested in or benefit the 8-county area.
  - d. Develop an interim contingency plan, including what would happen if the federal designation is delayed or not successful.
3. In your third 2011 meeting, address the results of the 2010 advocacy and develop a two-year advocacy plan. Incorporate a structure to reach out to all the partners that Rivers of Steel has touched through grants and technical assistance over the past 10 years to create a network of support, with the electronic communications to enable action.

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<b>X. APPENDICES: REPORTS, SUMMARIES, AND HANDOUTS USED IN THE PROJECT</b>
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(These files have been uploaded to a private, invitation-only folder on [www.Box.net](http://www.Box.net): Rivers of Steel)

***Strategic Assessment***

- [RoS-01 Strategic Assessment factsheet.pdf](#) (69kb): project description (1p)

***Online Survey & Responses***

- [RoS-02 online survey.pdf](#) (143kb): the 21 question SurveyGizmo form that we used (5p)
- [RoS-03 online survey results summary.pdf](#) (157kb): the summary of responses to the 21 question online survey . . . Retreat handout (4p)
- [RoS-04 online survey results.pdf](#) (223kb): the complete (anonymous) responses from all 35 respondents (19p)

***Interviews Summary: Board & Staff; Partners, Funders & Others***

- [RoS-05 telephone interviews summary.pdf](#) (111kb): themes and concerns (4p)

***Retreat Handouts***

- [RoS-06 Retreat agenda.pdf](#) (102kb): the agenda for the 9/22/10 Planning Retreat . . . handout (2p)
- [RoS-07 Retreat PowerPoint.pdf](#) (1.7mb): The 23 slides used at the Retreat, presented 2 slides/page . . . handout (12p)
- [RoS-08 Retreat worksheets.pdf](#) (149kb); the 7 participant worksheets used at the Retreat . . . handout (7p)
- [RoS-09 Retreat financial data 2006-2009.pdf](#) (48kb): factsheet on Rivers of Steel/SIHC finances . . . handout (1p)
- [RoS-10 Retreat finance scan of NHAs.pdf](#) (??kb): factsheet comparing finances of selected NHAs . . . handout (1p)

***Transcripts of Retreat Products***

- [RoS-11 Retreat notes.pdf](#) (161kb): transcription of notes from Retreat flipcharts and worksheets (10p)

***Reports***

- [RoS-12 next steps 9-29-10.pdf](#) (117kb): consultant recommendations to Planning Team after the Retreat (2p)
- [RoS-13 Strategic Assessment Final Report.pdf](#) (240kb): report and recommendations (23p)
- [RoS-14 Final Report Executive Summary.pdf](#) (67kb): brief summary (2p)
- [RoS-15 Strategic Assessment presentation.pdf](#) (xxx kb): PowerPoint slides for 12/9/2010 Board meeting (xx p)