



## Strategic Plan for 2018-2020

Developed by the Strategic Planning Subcommittee  
and

Approved by the Norman Borlaug Heritage Foundation Board  
December 2017

Last reviewed/revised by the  
Norman Borlaug Heritage Foundation Board on  
January 22, 2018

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## BACKGROUND

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The Norman Borlaug Heritage Foundation (NBHF) is a non-profit corporation with an all-volunteer board dedicated to the preservation of the birthplace and boyhood home of Dr. Norman E. Borlaug (1914-2009). The Foundation is committed to preserving the places where Dr. Borlaug established his values and work ethic and to recognizing his lifetime achievements and philosophy by welcoming a diversity of local, national, and international visitors to the farm, through education programs such as the Fall and Spring Inspire Education Days and the Education Residency Program, and by hosting agricultural, environmental, and humanitarian events on the Borlaug farmstead.

For over a half century, the scientific and humanitarian achievements of Dr. Norman Borlaug (Nobel Peace Prize laureate, winner of the Congressional Gold Medal and Presidential Medal of Freedom, and recipient of over 50 honorary doctoral degrees) kept starvation at bay for millions of people in third world countries. Gregg Easterbrook wrote of Borlaug, "Though barely known in the country of his birth, elsewhere in the world Norman Borlaug is widely considered to be among the leading Americans of our age."

Since its inception in 2000, the Foundation has restored and preserved the original structures located at the "Boyhood Farm" and adjoining "Birthplace" properties of Dr. Borlaug. Structures at the properties currently include the birthplace and boyhood homes, barns, a machine shed, chicken coop, and the one- room schoolhouse Dr. Borlaug attended in his youth. Visitors may also see trees once planted by the young Borlaug, wild prairie flowers, and informational signage with QR codes that were added in recent years along the walking path that interweaves the properties. A wide spectrum of visitors – from students and educators, to agriculturalists and legislators – have traveled to Northeast Iowa to experience the Borlaug farmstead.

The Foundation hosts two Inspire Education Days each year, bringing as many fifth graders as possible and several groups of high school students to the Borlaug farmstead from schools within a 45-mile radius. At Inspire Education Day, educators incorporate interdisciplinary components of education – ranging from science, to global studies, to math, and even music. Students also spend time learning about Dr. Borlaug's life and accomplishments and how his work has impacted the world.

For eleven years, Fall Inspire Education Day has taken place in September featuring a strong partnership with educators and students from Iowa State University. In 2010, the Foundation added a Spring Inspire Education Day as well, which takes place in May and features a strong partnership with Luther College educators and students. Foundation members collaborate with the college to provide a formative experience for those who will begin student teaching the following fall, while also keeping the spirit and educational legacy.

The Foundation hosts Borlaug-Thompson Interns each summer in partnership with the

College of Agriculture and Life Sciences at Iowa State University. The scholarship was established by NBHF founding Board member John (Jack) H. Thomson. Since his death in 2017, his son J. Scott Thomson has committed to continuing the scholarship. The Borlaug-Thompson Internship and Scholarship is one of the most prestigious internships offered by the college, enabling undergraduate students to serve as informal ambassadors to Northeast Iowa, develop projects and curricula to promote the legacy and values of Dr. Norman Borlaug, and make professional recommendations to the Foundation board, the ISU Extension, and the Dean of the College of Agriculture and Life Sciences.

Since 2014, the Foundation has hosted an annual Sustainable Farm Institute program to provide attendees with information and updates regarding practices that encourage and forward sustainable agriculture.

In October 2016, the NBHF Board appointed a strategic planning subcommittee with the charge of researching and completing a plan to guide the work of the Board for the next several years. This document is the product of that effort. In approving this plan in December 2017, the Board members committed to periodic review and revision of the plan so it will remain relevant and responsive to the needs of the Foundation and its constituents.

## GOVERNANCE

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**Founding Board of Directors:** Donald Arendt, Ken Becker, Ted Behrens, Steve Johnson, Rex Kleckner, Lori Moore, John (Jack) Thomson, Tony Tremmel, and Joyce Vagts.

**Foundation Advisors:** Matthew Behrens, Ted Behrens, Bill Borlaug, Jeanie Borlaug Laube, and Henry Elwood.

**Current Board of Directors:** Laura Schmauss (President), Mark Johnson (Vice President), Ken Becker (Secretary), Gary Gassett (Treasurer), Tom Spindler (Past President), Harold Flatland, Vickie Grube, Nichole Havlik, Steve Johnson, Todd Knobloch, Maury Kramer, Joanne Lane, Bill Reed, Mary Reicks, Christina Riessen, Neil Shaffer, Shirley Sovereign, and Dale Vagts.

## GUIDING PRINCIPLE

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*Honoring the Man, Strengthening the Legacy*

## MISSION

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*The mission of the Norman Borlaug Heritage Foundation is the preservation of Dr. Borlaug's birthplace and boyhood home and inspiration, encouragement, and empowerment through educational programming.*

## VALUES

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Through its work, the Norman Borlaug Heritage Foundation will remain faithful to the values exemplified by Dr. Borlaug including:

***Compassion*** for all people.

***Dedication*** to the task at hand regardless of its challenges or complexity.

***Determination*** to make the world a better place through hard work and ingenuity.

***Integrity*** in all transactions through a commitment to consistent moral and ethical standards.

## OPERATING BUDGET

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### Financial Report for NBHF for 2016:

#### **INCOME**

Conservation Reserve Program (CRP)	\$12,781
Contributions*	\$ 7,558
Grant	\$ 3,000
Other Income	\$ 1,615
<b>Total</b>	<b>\$24,954</b>

**NOTE:** Other income includes book sales and fundraising from wheat and t-shirt sales.

#### **EXPENSES**

Insurance, Taxes	\$ 6,811
Operating Expense	\$ 5,967
Supplies/Maintenance/Miscellaneous	\$ 2,330
Events/Capital Expenses	\$ 7,548
<b>Total</b>	<b>\$22,656</b>

### Projected Budget for 2017:

#### **INCOME**

Conservation Reserve Program (CRP)	\$12,781
Contributions*	\$ 2,500
Grant	\$ 3,000
Other Income	\$ 2,000
<b>Total</b>	<b>\$20,281</b>

#### **EXPENSES**

Insurance, Taxes	\$ 7,000
Operating Expenses	\$ 5,500
Supplies/Maintenance/Miscellaneous	\$ 6,500
<b>Total</b>	<b>\$19,000</b>

\*Contributions include Memorials and Donations

*Budgets do not include the Farm Institute Income and Expenses*

## FOCUS GROUP AND COMMUNITY SURVEY PROCESS AND RESULTS

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**Background:** The NBHF Board appointed a strategic planning subcommittee in 2016 composed of Board members Mark Johnson, Steve Johnson, Joanne Lane, Laura Schmauss, Barb Schwamman, and Tom Spindler to create a new plan for the Foundation. In November 2016, the subcommittee met with Dr. Julie Huiskamp of Cresco to discuss her assistance with the process. A retired librarian and education administrator, Huiskamp has led several strategic plan efforts with non-profit groups.

At their request following the November meeting, Huiskamp provided the subcommittee with a document outlining the strategic planning process and assigning a timeline for the process. The document was shared with the full NBHF Board and discussed at the December 2016 meeting. At that meeting, the Board voted to work with Huiskamp on the strategic planning project. Community input via focus groups, interviews, and surveys was included in the process outline.

**Purpose of Focus Groups:** Focus groups were used in the initial phase of the NBHF strategic planning process during 2017 to:

- collect opinions, beliefs, and attitudes about the work of the NBHF.
- identify participants' perceptions of strengths, weaknesses, opportunities, and threats (SWOT) regarding the NBHF.
- collect opinions, beliefs, and attitudes about the future of the NBHF.
- educate participants regarding the work of the NBHF.

**Group Categories:** Focus groups and community surveys included individuals who have a connection with the NBHF and, therefore, were somewhat knowledgeable about the history and work of the Foundation. The subcommittee identified the following categories for inclusion in the focus groups and community surveys:

- *Current and former members of the NBHF Board—Focus Groups*
- *Educational partners who have participated in Inspire Education Days—Focus Group*
- *Neighbors of the NBHF properties—Focus Group and Social*
- *Community Meeting—Focus Group open to the public*
- *Clubs and organizations—Community Surveys*
- *Local businesses and tourism groups—Community Surveys*

**Focus Group Session Agenda and Questions:** The agenda for the focus group meetings included:

1. Welcome and introductions
2. Brief history of NBHF and description of future projects
3. Questions and discussion
4. Brief explanation of future steps in planning process
5. Thanks and adjournment

The questions used during the focus group meetings were selected to elicit responses to fulfill the purposes of holding the group sessions. Questions proceeded from broad to specific and gave participants the opportunity to share their knowledge of and their vision for the future of the NBHF. Individuals who were unable to attend the focus group for their constituency were invited to provide their feedback in a written response electronically (via email) or through the mail. Several individuals in each group did so.

**Survey Process, Distribution and Questions:** In April 2017, the subcommittee made the decision to approach clubs and organizations and local businesses and tourism groups by mailing the questions and asking the group's president or organizer to use meeting time to discuss the questions. Accompanying the questions was a letter from Laura Schmauss, NBHF Board President and the consultant explaining the strategic planning process. The letter stressed the importance of public input into the process. This approach resulted in a very low response rate (3 out of 31 groups contacted provided feedback).

**Family Contacts:** In addition to the focus groups and community surveys, the President of the NBHF Board and the consultant jointly sent a letter to 12 members of the Borlaug family.

**Results:** The consultant reviewed the written summaries of the focus group meetings and surveys and developed a **SWOT (Strengths, Weaknesses, Opportunities, Threats) Analysis:** The SWOT analysis has been reviewed and approved by the NBHF Strategic Planning Subcommittee and the full Board. It is included in this document following this synopsis of the process.

**Next Steps:** As the result of the input received during this phase of the strategic planning process, the Subcommittee decided that communication with groups, organizations, and businesses that share a tie to or interest in Dr. Borlaug is prudent prior to finalizing a strategic plan for the Foundation. The future of the NBHF is at a critical juncture. While the status quo can be maintained in the near term, maintenance of the current programming and of the properties held by the NBHF will most certainly not survive in perpetuity without additional resources. Further, the Board has long considered an ambitious growth plan which makes even more necessary cooperative liaisons with other groups, organizations, and businesses who are interested in and willing to support Dr. Borlaug's legacy.

A draft plan that addresses the points included in the SWOT analysis has been generated and is included in this document. This plan will be shared with the NBHF Board and with constituent groups for discussion of feasibility before the plan is finalized and adopted by the NBHF Board. The NBHF Strategic Planning Committee also engaged in discussions regarding revision to the vision and mission for the organization and in the development of a short-term plan for 2018. Those results are also incorporated in this document.

## SWOT ANALYSIS RESULTS

### STRENGTHS

- Legacy of Dr. Norman Borlaug
- Borlaug family properties held by the Foundation
- Dedicated local Foundation Board
- Focus on educational programming and ties to education
- Enhanced web and social media presence
- Volunteer labor to maintain properties and programs

### WEAKNESSES

- Location limits accessibility and attraction as a destination
- Public knowledge limited unless exposed to Borlaug story
- Few champions for NBHF outside of Howard County, Iowa
- Lack of a clearly defined mission, vision, and plan
- Limited funding and few prospects for endowment
- Borlaug family involvement difficult due to distance

### OPPORTUNITIES

- Capitalize on Dr. Borlaug's international notoriety
- Property development to enhance use
- Alliances with other groups with Borlaug ties
- Increased outreach to K-12s, colleges, and universities
- Programming aimed at farm producers and researchers
- National monument or memorial status

### THREATS

- Lack of paid staff
- Board and volunteer composition limit outreach/growth
- Funding dependent upon Conservation Reserve Program
- Time since Dr. Borlaug's accomplishments/death
- Participation and governance regionally limited at present
- Difficulty in attracting strategic partners

## STRATEGIC GOALS

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The strategic goals of the Norman Borlaug Heritage Foundation were developed to address the primary areas in which the Foundation will address its activities and energies in the next several years. These goals include:

**Partnerships:** Cultivate new and existing collaborations that will result in authentic and sustainable growth for the Foundation.

**People:** Focus energy and resources to ensure exemplary leadership, staff, volunteers, and patrons united in active support of the Foundation and its goals.

**Posterity:** Embrace the mission and values of the Foundation in relevant and positive ways to ensure that Dr. Borlaug's legacy continues to inspire and incite to action.

**Programs:** Champion programs consistent with Dr. Borlaug's focus on youth activities and education and expand programming aimed at responsible farming practices and raising awareness of global food challenges.

**Properties:** Preserve and enhance the Borlaug properties to support programming, encourage tourism and shared use, honor farming as a way of life, and provide testament to the history of Dr. Borlaug and his family.

## STRATEGIC PLAN DETAIL

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### **STRATEGIC GOAL 1—PARTNERSHIPS**

Cultivate new and existing collaborations that will result in authentic and sustainable growth for the Foundation.

**Context:** While the Foundation has received encouragement and support from a variety of partners since 2000, it will be necessary for the Foundation to renew existing and forge new partnerships that will lead to a significant increase in revenue if growth and expansion of the work of the Foundation are to be realized.

#### **Strategies to Address this Goal:**

1. Identify partners with which the Foundation has worked and explore new collaborations.
2. Identify new partners with common interests to broaden opportunities for support.
3. Utilize established relationships between Foundation Board members and Borlaug family members to re-engage the family in the work of the Foundation.
4. Design a comprehensive resource development plan to meet projected financial need.

#### **Desired Outcomes and Metrics:**

1. Renewed/expanded collaboration resulting in ongoing volunteerism and/or donations with a minimum of three entities.
2. New collaborations resulting in ongoing volunteerism and/or donations with a minimum of three entities.
3. Increased participation by Borlaug family members in the activities of the Foundation.
4. Attainment of annual fundraising goals

#### **2018 Action Toward this Goal:**

1. Meet with leadership of The World Food Prize to review strategic plan and discuss partnership opportunities.
2. Include members of the Borlaug family in all mailings and updates sent by the Foundation in 2018.
3. Develop and implement a fundraising campaign with a goal of \$40,000.

## **STRATEGIC GOAL 2—PEOPLE**

Focus energy and resources to ensure exemplary leadership, staff, volunteers, and patrons united in active support of the Foundation and its goals.

**Context:** The long-term success of the Foundation is dependent on a strong Board of Directors, volunteers who are willing and able to provide active and consistent support, and patrons whose generosity ensures resources sufficient to fund the Foundation’s programs and properties.

### **Strategies to Address this Goal:**

1. Establish and implement a plan for regular donor recognition.
2. Define desired composition of the Board of Directors and fill vacancies to ensure membership reflects representation from the desired constituencies.
3. Develop and implement on-going Board development that will ensure orientation for new Board members and development for seasoned members designed to enhance Board effectiveness.
4. Design and fund a plan that will support the creation of a full-time position of Foundation director and a full- or part-time property manager.
5. Develop a volunteer corps with established job duties and oversight by a volunteer coordinator.
6. Create a membership-based *Friends of the Foundation* group to encourage volunteerism and provide on-going monetary support.
7. Re-establish and expand advisors to the Board of Directors to include representatives from strategic partners to maximize the reach and impact of the work of the Foundation.

### **Desired Outcomes and Metrics:**

1. Established, active advisory group
2. Annual review of Board composition
3. Board evaluation of development activities
4. Hire and continued employment of staff
5. Established, active volunteer corps
6. Established, active *Friends of the Foundation* group that meets annual fundraising goals

### **2018 Action Toward this Goal:**

1. Initiate donor recognition activities and document procedures.
2. Establish and implement Board composition guidelines.

### **STRATEGIC GOAL 3—POSTERITY**

Embrace the mission and values of the Foundation in relevant and positive ways to ensure that Dr. Borlaug's legacy continues to inspire and incite to action.

**Context:** Dr. Borlaug's legacy is significant when measured on a global scale. He is one of seven people in history and one of only three Americans to have received the Nobel Peace Prize, the Presidential Medal of Freedom, and the Congressional Gold Medal. His agricultural research led to his being named *Father of the Green Revolution* and he has been credited with saving more lives than any other person. The Norman Borlaug Heritage Foundation was established in 2000 to ensure that Dr. Borlaug's humble beginning in Howard County, Iowa is maintained to bear testament to the fact that every individual has the potential to make a difference.

#### **Strategies to Address this Goal:**

1. Maintain and enhance the Foundation's marketing efforts and social media presence.
2. Establish communication with individuals who knew and worked with Dr. Borlaug to preserve their memories and stories for future generations.
3. Ensure access to the Borlaug properties for purposes that reflect Dr. Borlaug's legacy.
4. In collaboration with appropriate partners, collect and/or identify and develop materials (curricula, books, video) that chronicle Dr. Borlaug's life and work and make them widely available for scholars, researchers, students, and the public.

#### **Desired Outcomes and Metrics:**

1. Track and analyze website visits and monitor Facebook posts to utilize feedback to make improvements to these sites.
2. Creation of an archive of memories and stories (oral histories) from those who knew and worked with Dr. Borlaug.
3. Track and monitor use of the Borlaug properties to ensure that the use is consistent with Dr. Borlaug's legacy.

#### **2018 Action Toward this Goal:**

1. Explore the idea of the creation of oral histories with likely partners (World Food, Silos and Smokestacks, University of Iowa, University of Minnesota, Iowa State University).

## **STRATEGIC GOAL 4—PROGRAMS**

Champion programs consistent with Dr. Borlaug's focus on youth activities and education and expand programming aimed at responsible farming practices and raising awareness of global food challenges.

**Context:** In arranging for the management of his birthplace and boyhood home to be entrusted to the Foundation, Dr. Borlaug was adamant that the properties be used to educate young people. The Foundation has gained recognition by providing quality educational programming for local K-12 students. Opportunities exist to further utilize the property for additional programming opportunities for all ages.

### **Strategies to Address this Goal:**

1. Implement a regular survey of Inspire Education Day participants to determine efficacy of programming.
2. Expand Inspire Education Day participation to include school districts in the tri-state area.
3. Expand collaboration with colleges and universities in the provision of educational programming.
4. Identify partners for adult programming and collaborate to design offerings appropriate to available audiences.
5. Pursue grant funding to support the development of educational curricula and background materials on Dr. Borlaug and his work for use by educators and students.

### **Desired Outcomes and Metrics:**

1. Inspire Education Day survey results
2. Expansion of Inspire Education Day participation to additional school districts
3. Expansion of college and university partners in educational programming
4. Addition of two programming partners for adult programming by 2019

### **2018 Action Toward this Goal:**

1. Initiate the survey of Inspire Education Day participants (students and faculty).

## **STRATEGIC GOAL 5—PROPERTIES**

Preserve and enhance the Borlaug properties to support programming, encourage tourism and shared use, honor farming as a way of life, and provide testament to the history of Dr. Borlaug and his family.

**Context:** The gift by Dr. Borlaug and his family of the land and buildings that comprise the Borlaug properties provides the Foundation with tangible assets that offer opportunities for programming, demonstrations, and attract tourism. The agricultural land has been placed in the Conservation Reserve Program (CRP) which provides revenue for the Foundation. **Since shortly after its inception in 2000, the Foundation has set a long-range goal of building a Borlaug Education Center on the property.** Upkeep and maintenance of the properties has been solely accomplished with volunteer labor. Future growth will depend on the ability of the Foundation to provide additional resources for staffing and maintenance.

### **Strategies to Address this Goal:**

1. Complete restoration project on birthplace barn.
2. Develop a property inventory and maintenance schedule calendar to assist volunteers and future maintenance staff.
3. After additional partners for fund and programming have been identified, conduct a needs assessment to determine future space needs.
4. Create a facilities master plan that includes estimates for resources necessary to build and maintain all properties.

### **Desired Outcomes and Metrics:**

1. Completed birthplace barn restoration
2. Completed property inventory and maintenance schedule
3. Completed needs assessment
4. Completed facilities master plan

### **2018 Action Toward this Goal:**

1. Complete restoration project on birthplace barn.
2. Develop a property inventory and maintenance schedule calendar to assist volunteers and future maintenance staff.

## 2018 ACTIONS TOWARD STRATEGIC GOALS

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### Partnerships:

1. Meet with leadership of The World Food Prize to review strategic plan and discuss partnership opportunities.
2. Include members of the Borlaug family in all mailings and updates sent by the Foundation in 2018.
3. Develop and implement a fundraising campaign with a goal of \$40,000.

### People:

1. Initiate donor recognition activities and document procedures.
2. Establish and implement Board composition guidelines.

### Posterity:

1. Explore the idea of the creation of oral histories with likely partners (World Food Prize, Silos and Smokestacks, University of Iowa, University of Minnesota, Iowa State University).

### Programs:

1. Initiate the survey of Inspire Education Day participants (students and faculty).

### Properties:

1. Complete restoration project on birthplace barn.
2. Develop a property inventory and maintenance schedule calendar to assist volunteers and future maintenance staff.