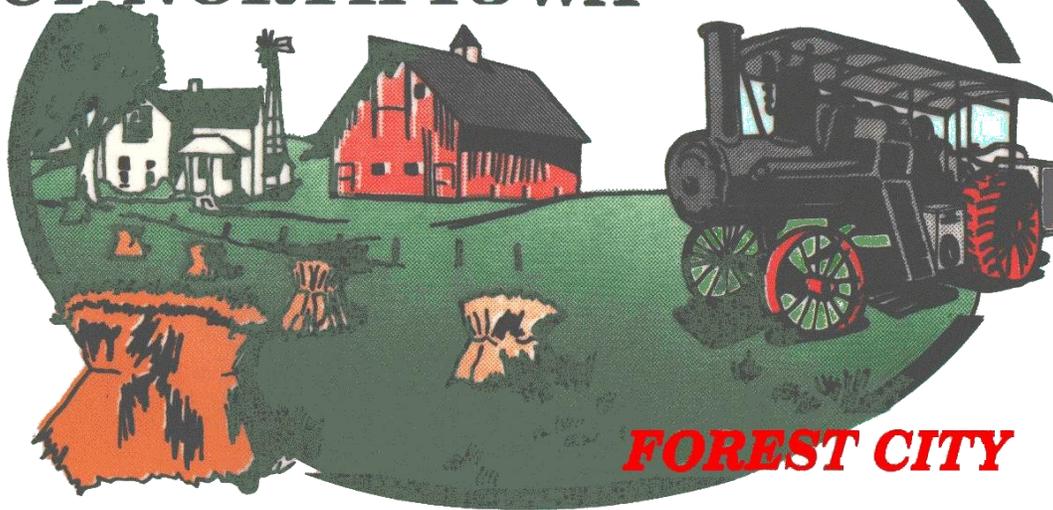


# *HERITAGE PARK OF NORTH IOWA*



Core Values,  
Mission,  
Vision,  
Behaviors,  
Organization  
And  
Operational Overview

Version 5 – March 8, 2014

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## Purpose

This document is being created to provide everyone associated with Heritage Park of North Iowa a single source that explains who we are, what we are, the principals behind how we operate and how we expect everyone to behave. This will be accomplished by defining our:

- Core Values
- Mission
- Vision
- Behaviors
- Organization

The concepts behind each of the above items are also presented.

This document is intended to be an accurate representation of Heritage Park of North Iowa. As such it will need to change over time as will the organization.

It is hoped that this document will help us:

- Be consistent and purposeful in what we do
- Provide guidance for making decisions
- Provide a framework for how we behave
- Provide a common understanding about who and what we are
- Provide a resource for showing those we serve who and what we are
- Clearly define roles and responsibilities

This document describes what we want for Heritage Park of North Iowa. It will take all of us working together to give it life and make it happen.

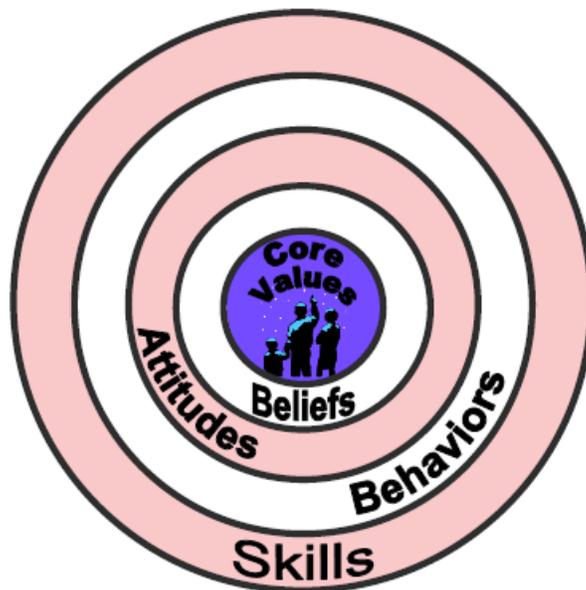
## Core Values

The core values for Heritage Park of North Iowa are:

- Learning
- Teamwork
- Respect
- Community
- Diversity
- Heritage
- Courage

Even though we frequently talk about mission and vision first, the basic underlying foundation for both are our core values. Core values are the principles and standards at the very center of our character, and from which we will not budge or stray.

Core values are extremely stable and change only very slowly over long periods of time. Core values form the basis for our beliefs about life, ourselves and those around us, and the human potential of ourselves and others. Values and beliefs form our attitudes and guide our behavior. The behaviors we engage in are what people around us see, along with our skills and actions. Our outer or public shell of behaviors and skills can change rapidly and dramatically through our lives, influenced by our environment and guided by our more stable core values and beliefs.



Core values are our ethical and moral compass and decision making foundation. They are the ideals and ethics that we hold dear. They drive decision making in that they are constantly referred to in the decision making process. That is, when in a tough spot, the answer needs, first and foremost, to be consistent with the core values. They are generally for both internal and external consumption. They tell

those in our organization how things are done and those outside our organization why they want to be associated with us. Core values are best when they are few in number (between 5 and 10) but high in meaning and lived daily.

Values are critically important to us because those who have the same value systems, or core values, tend to succeed within the organization, while those who do not share that set of values generally do not succeed. As all of us are faced with daily decision-making, the core values will serve as the guidelines. When leaders, members or volunteers have values that do not match those of Heritage Park of North Iowa – stated or implied – the results could be people leaving, decreased productivity and dissatisfaction.

The following definitions for each of our core values are provided for reference and understanding purposes.

- Learning
  - The acquisition of knowledge or skills through experience, study, or by being taught.
  - The activity or process of gaining knowledge or skill by studying, practicing, being taught, or experiencing something.
  - Acquiring new, or modifying and reinforcing, existing knowledge, behaviors, skills, values, or preferences and may involve synthesizing different types of information.
- Teamwork
  - The action of working with someone to produce or create something.
  - To work with another person or group in order to achieve or do something.
  - Working with each other to do a task and to achieve shared goals. It is a recursive process where two or more people or organizations work together to realize shared goals. This is more than the intersection of common goals seen in co-operative ventures, but a deep, collective, determination to reach an identical objective.
- Respect
  - A feeling or understanding that everyone is important, serious, etc., and should be treated in an appropriate way.
  - Willingness to show consideration or appreciation.
  - A positive feeling of esteem or deference for a person or other entity and also specific actions and conduct representative of that esteem. Respect can be a specific feeling of regard for the actual qualities of the one respected. It can also be conduct in accord with a specific ethic of respect. Rude conduct is usually considered to indicate a lack of respect.
- Community
  - A feeling of fellowship with others, as a result of sharing common attitudes, interests, and goals.
  - An interacting population of various kinds of individuals.
  - A broad term for fellowship or organized society.
- Diversity

- The quality or state of having many different forms, types, ideas, etc.
- The concept of diversity encompasses acceptance and respect. It means understanding that each individual is unique, and recognizing our individual differences. It is the exploration of these differences in a safe, positive, and nurturing environment. It is about understanding each other and moving beyond simple tolerance to embracing and celebrating the rich dimensions of diversity contained within each individual.
- The characteristic of a place where a variety of different activities occurs.
- Heritage
  - Something that is passed down from preceding generations.
  - Something transmitted by or acquired from a predecessor.
  - The legacy of physical artifacts and intangible attributes of a group or society
- Courage
  - The ability to do something that you know is difficult or dangerous.
  - The confidence to act in accordance with one's beliefs
  - The ability to act rightly in the face of popular opposition, shame, scandal, or discouragement.

## Mission

**The mission of Heritage Park of North Iowa is to preserve our heritage, to educate, to entertain and to help our region's economy through tourism.**

A mission statement deals with questions like, "Why are we here?", "Why do we exist?", "Why do we get up each day and do what we do?", "What is it that we get paid for?" "What function does the organization perform? For whom? How?" The mission is a broad statement of scope, purpose and operation that distinguishes us from other organizations.

Our mission statement defines what we do, who we serve, and how we serve (creates value for) our patrons. It is designed to provide clarity of focus and direction for those in Heritage Park of North Iowa and answers the questions of who we serve and how. It also creates clarity of value for those we serve outside of Heritage Park of North Iowa and answers the question of whether we can be of value to them and/or their organization.

## Vision

**The vision for Heritage Park of North Iowa is To be a self-sustaining great asset to our region that provide opportunities to learn, participate and be entertained through our activities and events about our past, present and future heritage.**

While a mission is a statement of what is, a vision is a statement of what or how you would like things to be. A picture of the future you're working to create, what you want to be when you grow up, what you want Heritage Park of North Iowa to become.

Without a vision of where you're going how can you develop a plan to get there and how will you know when you've arrived? Without a vision of where we would like to be, we can continue hiking various trails through life, climbing mountain after mountain, only to discover each time that we've arrived somewhere we really don't want to be.

Our vision statement sets a dynamic and compelling view of Heritage Park of North Iowa at some point in the future. It is an emotional driver to some "big idea" or challenge that drives those us toward it. It is not intended for those outside of Heritage Park of North Iowa. It is not a goal, as they should be **SMART** (**S**pecific, **M**easurable, **A**ttainable, **R**ewarding, **T**imed), but rather it can be a wild, crazy, and even unattainable idea, as long as it provides a deeply emotional drive to accomplish something great that we can get behind and drive toward.

Just a few words about greatness, Heritage Park of North Iowa is blessed with many fabulous things in its possession (owned or otherwise). Those things help us do great things but they will not make us a great organization. **It will be the positive impacts and impressions we make on people's lives that will make us great not the things we do it with.** We can achieve greatness.

## Behaviors

The core behaviors for Heritage Park of North Iowa are:

- **Serve – Help each other be successful**
- **Open and honest communications**
- **Treat everyone respectfully, fairly and consistently**
- **Demonstrate high ethical standards**
- **Be flexible and adaptable**
- **Show appreciation**

As was shown above, behaviors are closely tied to core values through attitudes and beliefs. We have outlined the core values that Heritage Park of North Iowa uses. Attitudes and beliefs are very personal and really cannot be directly tied to an organization. They can be tied to individuals in an organization though. The behaviors that come as a result of ones attitudes and beliefs are important to any organization. If everyone behaves in a manner that is consistent with an organization's core values, the likelihood of the organization being successful at achieving its mission and vision are significantly higher than when that is not the case. It is believed that the behaviors listed above are crucial for Heritage Park of North Iowa to be successful. Everyone is required to honor these behaviors.

## Organization

Heritage Park of North Iowa functions as a project of the Winnebago Historical Society. It is governed by the Board of Directors for the Winnebago Historical Society. Heritage Park of North Iowa is made up of the Heritage Park Project Committee, multiple subcommittees and multiple subgroups. Each of these entities is discussed below.

### Heritage Park Project Committee

The Heritage Park Project Committee (“Committee”) is the primary governing body for Heritage Park of North Iowa. It will hold at minimum one monthly meeting normally on the first Tuesday of every month. Anyone can request that an item be added to the agenda and every reasonable request will be honored.

The Committee consists of a Chair, Vice chair, Winnebago Historical Society Treasurer, Winnebago Historical Society Board Liaison and Winnebago Historical Society members present. Winnebago Historical Society members that cannot be present at a given meeting are encouraged to contact the Chair or Vice Chair to make their views known and to ensure they are presented to the Committee. Non-members of Winnebago Historical Society are welcome to attend and participate but have no voting privileges.

The Committee has the primary responsibility for Heritage Park of North Iowa delivering on its mission and achieving its vision while honoring its core values and behaviors.

The following must be presented to the Committee for a majority approval (one person one equal vote) before they can move forward:

- All projects, events, activities or expenses with a total cost in excess of \$1,000.00.
- Any use of Heritage Park property by an outside entity.
- Any Heritage Park activity or event that is open to the public.
- Any event or activity that is creating a conflict with something already scheduled.
- Any long term guest staying at Heritage Park of North Iowa (longer than a few days)
- Any Heritage Park of North Iowa sponsorship of an outside entity.
- Subcommittee Chair vacancies or changes
- Assignment or changes to usage or purpose of any Heritage Park of North Iowa facility
- Exceptions to normal operating procedures for Heritage Park of North Iowa
- Anything that has the potential to violate our core values or behaviors
- Sale of Heritage Park of North Iowa non-crop property
- Acceptance of non-financial donations with value in excess of \$500.00
- Election of Chair and Vice Chair
- Severe behavior misconducts
- Unresolved conflicts relative to Heritage Park of North Iowa activities, events or facilities

The Chair and Vice Chair positions will be filled via an election of Winnebago Historical Society members present at the annual appreciation dinner. One person cannot hold both of these offices nor can any one person hold either of these offices for more than two consecutive years. The Winnebago Historical

Society Board Liaison cannot hold either of these offices. Nominations will be taken at the Committee meeting held at least two weeks prior to the annual appreciation dinner. Any Winnebago Historical Society member can be nominated or make a nomination.

### **Chair**

The Chair has the following responsibilities:

- Chair, builds agenda, and publishes agenda/minutes for meetings of the Committee
- Approve expenditures for projects or expenses with a total cost of less than \$1,000.00 after getting consensus from either the Vice Chair or the Treasurer of the Winnebago Historical Society.
- Approves all bills or expenses paid except those where the Chair is the recipient of payment
- Signs any appropriate legal documents as approved by the Winnebago Historical Society Board
- Demonstrates Heritage Park of North Iowa core values and behaviors
- Serve as check and balance system to all subcommittees
- Ensures all actions, affairs, etc. are handled in accordance with the approvals given by the Committee
- Other duties as assigned by the Committee or the Winnebago Historical Society Board

### **Vice Chair**

The Vice Chair has the following responsibilities:

- Fill in as Chair when the Chair person is absent or unable to complete their duties
- Approves all bills or expenses where the Chair is the recipient of the payment
- Demonstrates Heritage Park of North Iowa core values and behaviors
- Serve as check and balance system to all subcommittees and the Chair
- Ensures all actions, affairs, etc. are handled in accordance with the approvals given by the Committee
- Other duties as assigned by the Committee, Chair or the Winnebago Historical Society Board

### **Winnebago Historical Society Treasurer**

The Winnebago Historical Society Treasurer has the following Responsibilities:

- Complete the duties as assigned by the Winnebago Historical Society Board
- Complete the financial transactions duly approved by the Committee, Chair or Vice Chair
- Provide accurate and complete financial reports on a monthly basis to the Committee
- Demonstrates Heritage Park of North Iowa core values and behaviors
- Serve as check and balance system to the Chair and Vice Chair
- Ensures all actions, affairs, etc. are handled in accordance with the approvals given by the Committee
- Other duties as assigned by the Committee or the Winnebago Historical Society Board

### **Winnebago Historical Society Board Liaison**

The Winnebago Historical Society Board Liaison is assigned by the Winnebago Historical Society Board and must be a member of that Board. They have the following Responsibilities:

- Complete the duties as assigned by the Winnebago Historical Society Board
- Ensure that Heritage Park of North Iowa is operating in accordance with the Winnebago Historical Society's bylaws, articles of incorporation and policies
- Oversee the election of Chair and Vice Chair to ensure the election is conducted in a manner consistent with our core values and behaviors
- Demonstrates Heritage Park of North Iowa core values and behaviors
- Serve as check and balance system to the Committee
- Ensures all actions, affairs, etc. are handled in accordance with the approvals given by the Committee
- Other duties as assigned by the Committee or the Winnebago Historical Society Board

### **Winnebago Historical Society Members**

The Winnebago Historical Society members have the following Responsibilities:

- Attend and participate in Committee meetings
- Serve as Chair for subcommittees
- Serve as volunteers, exhibitors or cosigners for the events and activities at Heritage Park of North Iowa
- Demonstrates Heritage Park of North Iowa core values and behaviors
- Serve as check and balance system to the Heritage Park of North Iowa leadership
- Ensures all actions, affairs, etc. are handled in accordance with the approvals given by the Committee
- Other duties as assigned by the Committee or the Winnebago Historical Society Board

### **Subcommittees**

Heritage Park of North Iowa will have the following subcommittees:

- Museum
- Building and Grounds
- Equipment
- Marketing
- Scheduled events subcommittees

No subcommittee is allowed to consist of only one Winnebago Historical Society member. This is a requirement so that both Heritage Park of North Iowa and a given member are appropriately protected. If more than one Winnebago Historical Society member cannot be recruited for a subcommittee, then the Chair or Vice Chair will participate on the subcommittee to ensure there is more than one member involved. Non-members of Winnebago Historical Society are welcome to participate on any

subcommittee but without voting privileges. Anyone desiring to be on a subcommittee should be allowed to do so.

Each subcommittee will have a chair that has been approved by the Committee. It is the subcommittee Chair's responsibility to:

- Ensure decisions are made with the involvement of more than one person
- Facilitate resolution of conflicts that arise up to and including bring them to the Committee
- Demonstrates Heritage Park of North Iowa core values and behaviors
- Ensure the subcommittee and subgroups conducts the appropriate activities in accordance with our core values, behaviors and mission
- Ensures all actions, affairs, etc. are handled in accordance with the approvals given by the Committee

### **Museum**

The Museum subcommittee is responsible for overseeing the activities for the facilities that function as a museum or storage facility and tours activity.

### **Buildings and Grounds**

The Building and Grounds subcommittee is responsible for overseeing the activities for grounds maintenance, farming, building maintenance and new construction as well as ensuring appropriate insurance coverage is in effect.

### **Equipment**

The Equipment subcommittee is responsible for the maintenance, training and purchasing of all equipment belonging to Heritage Park of North Iowa.

### **Marketing**

The Marketing subcommittee is responsible for the following:

- Overall responsibility for the web site
- Marketing materials and advertisement that are for the Park as a whole
- Ensuring consistency in all our marketing messages, marketing materials and advertisements including those for specific events
- Press releases even those for events
- Campaigns not specific to an event
- Oversight of campaigns to ensure consistency
- Sales of Park promotional items like shirts, caps, etc.

### **Scheduled Events Subcommittees**

A subcommittee will be formed to handle all activities needed to promote, organize, conduct, etc. each scheduled event. The following scheduled events subcommittees are:

- Appreciation Dinner

- Music Festival
- Steam School
- Kite Day
- Bash on the Farm
- International Festival
- Heritage Festival
- Tractor Ride
- Steam Threshing Festival
- Consignment Auction
- Other future events as agreed upon by the Committee

## **Subgroups**

Subgroups function under the various subcommittees. Subgroups can be used to allocate out the work and responsibilities of the subcommittee. No subgroup is allowed to consist of only one Winnebago Historical Society member. This is a requirement so that both Heritage Park of North Iowa and a given member are appropriately protected. If more than one Winnebago Historical Society member cannot be recruited for a subgroup, then the Committee Chair, Committee Vice Chair or subcommittee Chair will participate in the subgroup to ensure there is more than one member involved. Non-members of Winnebago Historical Society are welcome to participate on any subgroup but without voting privileges. Anyone desiring to serve on a subgroup should be allowed to do so.

## **Operational Overview**

The purpose of this section is to define the basics about how Heritage Park of North Iowa operates its affairs. The following are discussed:

- Human Resources
- Financial Resources

## **Human Resources**

Heritage Park of North Iowa utilizes the following human resources above and beyond what was identified earlier in the Organization section. A given individual, family, organization, etc. can fall into one or more of these human resource groups. Each is discussed below.

- Members
- Volunteers
- Exhibitors
- Consignors
- Vendors

## **Members**

Members are individuals, families, organizations, etc. that are members in good standing of the Winnebago Historical Society. Members are encouraged to take an active role in helping Heritage Park

of North Iowa complete its mission. Members can choose to be voting members of the Committee and can be consignors. Members do receive free admission to Heritage Park events or activities. This does not apply to events that other organizations sponsor that utilize Heritage Park of North Iowa facilities.

### **Volunteers**

Volunteers are individuals or organizations that donate their time, effort and ideas to help Heritage Park of North Iowa complete its mission. Volunteers are not required to be members but are encouraged to become one. Volunteers may be afforded special privileges relative to activities or events for which they volunteer i.e., free admission. These privileges are activity or event specific and they are subject to change at any time. Each activity or event will identify such privileges.

### **Exhibitors**

Exhibitors are any individual, family, organization, etc. that displays their possessions during a Heritage Park of North Iowa activity or event. Exhibitors are not required to be members but are encouraged to become one. Exhibitors may be afforded special privileges relative to activities or events for which they participate i.e., free admission. These privileges are activity or event specific and they are subject to change at any time. Each activity or event will identify such privileges.

### **Consignors**

Consignors are individuals, families, organizations, etc. that store or display their possessions at Heritage Park of North Iowa at times beyond when events and activities are occurring. Any consignor possessions stored or displayed at Heritage Park of North Iowa must help Heritage Park of North Iowa achieve its mission and vision. Consignors must be members. It is also the responsibility of the consignor to protect their possessions with insurance. Heritage Park of North Iowa will not cover a consignor's possessions unless so approved by the Committee. Heritage Park of North Iowa reserves the right to

- Refuse acceptance of a Consignors possessions should it be viewed as not helping Heritage Park of North Iowa achieve its mission and vision.
- Determine where Consignors possessions will be stored or displayed.
- Remove Consignors possession from Heritage Park property should it not be accepted. Every effort will be made to notify Consignors when their possessions need to be removed so they have ample time to remove the possessions them self.
- Move Consignors possessions as it sees fit. Every effort will be made to notify Consignors when their possessions need to be moved so they can have an opportunity to move the possessions them self.

Any disagreement resulting from the Heritage Park of North Iowa rights defined will be settled by the Committee.

### **Vendors**

Vendors are any individual, family, organization, etc. that offer something for sale or give away at a Heritage Park of North Iowa event. The fees charged to vendors and vendor guidelines for each event are to be published publicly. Vendors are responsible for providing their own insurance unless otherwise approved by the Committee.

## Financial

Heritage Park of North Iowa legally functions as a project of the Winnebago Historical Society. As such it will operate under the following rules regarding financial transactions:

- Heritage Park of North Iowa cannot borrow money without the approval of the Winnebago Historical Society Board. The Winnebago Historical Society will be the official entity responsible for any such debt. Heritage Park of North Iowa is responsible for providing the funds to the Winnebago Historical Society to make all payments on debts approved for its use.
- Heritage Park revenue, funds and expenses are to be regarded as separate from rest of the Winnebago Historical Society and are under the control of the Committee.
- The Winnebago Historical Society Treasurer will maintain separate ledger accounts for Heritage Park of North Iowa funds, income and expenses. Separate financial reports for Heritage Park of North Iowa will be provided on a periodic basis as defined by the Committee.
- Heritage Park of North Iowa financial transactions will utilize the same bank accounts used by the Winnebago Historical Society.
- Winnebago Historical Society membership revenue will be split evenly between Heritage Park of North Iowa and the rest of the Winnebago Historical Society.

## Revenue Sources

Heritage Park of North Iowa receives financial resources from the following sources:

- Grants
- Donations
- Revenue from events
- Rents
- Sale of property

## Grants

Heritage Park of North Iowa receives a significant portion of its funding from grants. We have to apply to receive the grants we are awarded. Some of these grants are general purpose and others are for a designated purpose. Grants that are received for a designated purpose require that we only spend those funds for that purpose. It would be illegal and unethical to do otherwise besides being a violation of our core values and behaviors. We do have discretion regarding how we spend the funds from general purpose grants. The majority of the funds we receive from grants are from designated grants.

## Donations

Heritage Park of North Iowa receives donations of two major types, financial or non-financial. Non-financial donations are when things are donated to us. Financial donations are when we receive money.

For Heritage Park of North Iowa to accept a non-financial donation, it must be approved by the Committee, if its value is in excess of \$500.00 or has conditions associated with its acceptance. Many times there are conditions attached to such donations and we need to ensure accepting those

conditions are in our best interest as well as fits with our mission and vision. Conditions that are sometimes attached to such donations include:

- Not allowed to sell the property at least as long as some of the donors are alive
- Must be stored inside
- We have to incur costs to get the items
- Items require facilities we do not have and would need to purchase
- Required to maintain insurance on the item.

Like grants, financial donations can be general purpose or designated. We must honor the same rules for designated donations as we do for designated grants. We generally do not have to apply for donations though.

### *Revenue from Events*

Heritage Park of North Iowa generates significant revenue and expenses from the events and activities it conducts. Each of these events or activities subcommittees is to prepare a budget showing expected expenses and revenue. The budget for Heritage Park events and activities needs to be approved by the Committee. Revenue from the event and activities will first be used to pay the expenses incurred. The remaining profits will go to the general budget unless the Committee has otherwise designated.

### *Rents*

Heritage Park of North Iowa rents out its farm ground and its facilities from time to time. The contract for renting of the farm ground has to be approved by the Committee each year. Other facilities are rented to the public to host various events. The Committee will establish a standard price for renting of the most popular Heritage Park of North Iowa facilities to the general public for small events. The Museum subcommittee will oversee facilities rental events. Any event requiring the rent of more than a building or two must be approved by the Committee and the Committee will establish a price for each such event.

### *Sale of property*

When Heritage Park of North Iowa sells property, other than crops, it must be approved by the Committee. The proceeds from the sale of Heritage Park of North Iowa property will go to the general budget unless otherwise designed by the Committee.