

Filadelfijas Brīvo latviešu biedrība  
Philadelphia Society of Free Letts

**BLB FUTURES: WHAT NEXT?**



**FINAL REPORT and RECOMMENDATIONS**

Submitted by the BLB Futures Committee

Presented to:  
the Board of Directors of the  
Philadelphia Society of Free Letts

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## **Philadelphia Society of Free Letts**

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# BLB FUTURES: WHAT NEXT?

Recommendations from the Futures Committee,  
Submitted to the Board of the Philadelphia Society of Free Letts  
March 20, 2022

## **A. THE COMMITTEE’S MANDATE: How should we move forward?**

As members of the Futures Committee, we understood our assignment to be helping the board answer a number of important issues related to the Society’s building given its conditions today. These fundamental questions arose after the German Society approached the Philadelphia Society of Free Letts or “Brīvo Latviešu Biedrība” (hereinafter called the “BLB”) to ascertain whether we might be interested in selling the Latvian Society’s building to them at some point in the future. This fundamental question resulted in an assessment of where we are as a Society today and in what directions we ought to be heading over the next 3-5 years. It called for looking ahead in terms of a 10-year time horizon as well, given generational changes and the needs of multiple audiences that are in play as well. By addressing these questions, we felt we would be in a better position to make an assessment of what potential directions the BLB could take to head forward into the future and yet make financially sustainable choices.

To help us address this inquiry, we needed to address several key issues:

- 1) To consider and evaluate whether owning and maintaining our existing building is critical and feasible to achieve the goals that the Society has today. (i.e., Should we entertain an offer from the German Society to buy the North 7<sup>th</sup> Street property or is it important for us to keep ownership of the building? Can we afford to maintain the building?)
- 2) To have a clear understanding of what the future needs of the Society are. And to discern what our membership’s goals are in the long term.
- 3) To assess the management/personnel requirements that are necessary to carry out the organization’s priorities going into the future. This means looking at what our shared needs are in terms of a 3-5 year time horizon and beyond.

## **WHAT DO OUR ARTICLES OF INCORPORATION HAVE TO SAY ABOUT OUR ORGANIZATION?**

Before looking at ways to assess our future, we briefly reviewed our articles of incorporation to remind ourselves regarding our organization’s stated reason for being as specified in the latest edition of the “Articles of Incorporation of ‘The Philadelphia Society of Free Letts.’” First of all, the Philadelphia Society of Free Letts exists today under the provisions of the Pennsylvania Nonprofit Corporation Law of 1972 (as amended). Under this law, and in accordance with the United States Internal Revenue Law of 1954, the Society is authorized:

“to foster public appreciation and understanding of Latvian culture and language , to maintain and preserve archives, records, books, manuscripts, bibliography, and all materials, literature, documents, and papers relating to Latvian culture, art and language.”

It is important to note that the BLB’s articles of incorporation do not state *how* we should be advancing the organization’s work. That is up to the membership and its board. We can shape our future as we wish as long as our activities stay within the parameters of the law as cited above. As the Futures Committee’s work unfolded, the key questions that we needed to address related to how to define our future goals:

“to foster **public appreciation and understanding** of Latvian culture and language.”

#### WHERE DO OUR MEMBERS LIVE?

As we began identifying the issues that needed to be addressed, it was important for the committee to take a look at where our members actually reside. Using membership zip code information that Board President Laila Gansert supplied, we broke down the geographic distribution of our active paid membership (129 members) as of June 2021.

While our organization’s name and address defines us as a Philadelphia based organization, it became clear that our constituency is largely a regional one. The interesting finding that came out of this tabulation is that Society’s physical location today is rather *centrally* located given the geographically spread out distribution of the Society’s membership and this has bearing on issues of generally balanced access to the Society’s activities in terms of the membership’s travel time.

The tally of members residing in the Greater Philadelphia region breaks out as follows:

- Philadelphia city/county: **23.26%**
- The city’s “collar counties” in Pennsylvania west of the Delaware River, including Delaware County, Chester County, Montgomery County and Bucks County: **37.21%**
- South Jersey Counties east of the Delaware River: **15.50%**
- Wilmington, Delaware area south of Philadelphia: **3.10%**
- Outlying metro area counties including Berks, Cumberland, Lancaster and Lehigh: **5.43%**

In addition, there is a significant number of members living outside the Greater Philadelphia region. This includes a diverse set of places including: Massachusetts, New York, Maryland, Virginia and a scattering of members living in the Southeastern US, the Midwest and the Far West regions of the country. Together the “outside of the region” membership is 20 individuals or **15.50%** of the BLB’s total membership count in 2021. This seemed like an important fact to note as the committee began looking at the “overall picture” as it relates to the organization’s future options to expand its membership. Additional details of the zip code tabulation can be found in **Appendix A**.

## **B. FOCUS ON OUTCOMES**

Given the provisions of BLB's articles of incorporation, and in order to get at some recommendations for the board for consideration of potential actions to take regarding our building's needs and planning for the future, the ad hoc members of the Futures Committee needed to think in terms of "outcomes." In other words, we needed to know something about three main considerations:

- How much are we willing to change at the Biedrība?
- How much do we really want the BLB to be different as an organization going forward, because of the work that we believe is important for us to undertake and be responsive to our times and its membership?
- How much are we ready to do to achieve a certain new vision that is truly sustainable?

By answering what these outcomes ought to be, we would be in a better position to judge what our needs and options are vis-à-vis the building.

## **C. TOWARD A BLB VISION FOR THE FUTURE**

In contemporary business and in non-profit management practice, both vision and mission statements are core elements of conducting a successful operation. Having a vision statement is fundamental because it serves as a guiding light as to where we are heading. It's a critical element to consider because it shapes an appropriate vision for BLB's future. Once we do that, we are in a position to formulate a meaningful mission statement in accordance with our "vision." That, in turn, helps us understand what we really need to accomplish in terms of planning for our building requirements. At the outset, the Futures Committee spent a considerable amount of time exploring what our vision might be for the future. Before taking a brief look at potential scenarios, let's define what a vision and mission statements actually are and why they are important.

- a) What is the difference between a vision statement and a mission statement?

Before drafting its potential vision statements for the BLB, the committee first addressed what a vision *is not*. It should not be confused with a mission statement which is *based in the present* and designed to convey why the organization exists and what it does. The mission statement describes what we are concretely doing as it is expressed to members of the organization and the external community in terms of the programming that we offer. Vision statements, on the other hand, are *future-based* and are meant to *inspire and give direction* to an organization's membership and its leadership. Vision statements are important for another very important reason especially for non-profits like the Society.

b) Vision statements and raising money

Vision statements are particularly instructive and have great importance when a non-profit entity tries to raise money. When potential donors and philanthropic organizations are asked to give support to a proposed initiative by another organization, they want to understand what the broader aspirations of the organization are. Why should they consider a request an application for money? Is it relevant to them? Why should a private donor see the organization as an appropriate place to give? The question arises: do the vision and goals of the applicant organization coincide with the philanthropic mission and priorities of the donor? Hence, the applicant must have a persuasive argument for receiving support. The vision and mission statements are the foundation for the “ask.”

c) Need for adopting a vision statements for the BLB

Adoption of a vision statement by the BLB board is therefore essential in order to move forward and to have everyone on board about BLB’s purpose. This is closely related to the matter of where we are heading with our programs and whether it is prudent for us to sell or not to sell BLB’s building on North 7<sup>th</sup> Street. The first order of business is therefore to identify our goals for the future, identify our liabilities, accentuate our strengths, and then clearly articulate how we plan to achieve our goals and dreams for the future.

Our mission statement will flow from that vision. It will address what we actually intend to do in terms of programming strategy and planning specific experiences that reach out to our membership and to the public at large. It will help us determine whether a physical presence at our North 7th Street location is critical to our success. Is the building essential to our ability to accomplish our mission? An adopted vision statement will serve as a reflection of BLB’s ambitions and motivation to address audiences and to make a difference and to be part of something bigger than just functioning as a gathering place for social activities. It looks to the fulfillment of our purpose and acknowledges what we are doing for ourselves and future generations. Therefore, simply stated vision is *aspiration*. And mission deals with our *actionable activities*.

**D. A RANGE OF VISIONS FOR THE FUTURE**

When the Futures Committee convened for the first time, we discussed amongst ourselves what our own notions are of what the BLB meant to us and what it could become going into the future. After sharing our thoughts, we recorded our notions of what a vision for a future ought to be. But we also wanted to learn what our membership felt about these various scenarios. What else could the members suggest? What was their take on appropriate directions to take going forward given the constraints we face today?



We created a rather simple on-line survey instrument which was sent out to all current members. Both English and Latvian versions were made available. It was designed and administered in the summer/fall of 2021. (See **Appendix B** for a general summary of responses received). The survey helped us confirm which scenarios are preferable and what other issues to think about as we consider the BLB's future directions. The survey gave us some insight on what our members' priorities are but it also revealed what troubles them about our organization. We were pleased to receive these candid answers from our members.

The scenarios that we asked the respondents to react to ranged from wide-reaching engagement with a broader nation-wide constituency down to a narrower focus limited to the needs of members living in the Greater Philadelphia region including the Philadelphia suburbs and South Jersey counties. The range of perspectives is summarized briefly below, but the choices were not considered to be mutually exclusive. As a committee, we understood that a collectively created vision statement may well incorporate a number of approaches that eventually result in a cohesive view of the society's future. Here are the vision statement scenarios that active members were asked to consider and then prioritize:

Global reach. Connect people who appreciate Latvian and Baltic cultures, in Philadelphia and throughout the U.S. (including the many diaspora Latvians in locations isolated from Latvian life), and globally through a vibrant, welcoming, and supportive community both onsite and virtual for people with connections to Latvia and non-Latvians interested in Latvian culture, while honoring Latvia's history, heritage, and language. It is a virtual center for a great array of cultural presentations with input from across the country as well as from Latvia. It contributes to a thriving future for Latvia and Latvians in an increasingly globalized world.

Baltic partnership. Seek out, understand, and address the needs of the Latvian community today, leading to an expanded membership, operating on a sound financial footing, and partnering programmatically with its Lithuanian and Estonian sister organizations (potentially sharing space and resources) to make the region's Baltic presence known in order to raise public awareness on the local, regional and national stage.

Focus on the U.S. Be recognized as a leading Latvian ethnic society in the United States by creating and hosting cultural and entertainment events in the Society's unique presentation and social space.

Create a Greater Philadelphia visibility for the Society. Be a lively community center that supports Latvian culture, facilitates contacts, encourages sharing of resources, and commemorates the immigrant generation that left Latvia to establish a new life after

World War II. Support recent immigrants and guests from Latvia, but also reach out to the larger city community by offering cultural programs such as lectures, movies, concerts, and seminars for the Latvian community and for the American public at large. Promote and share the strength and talents of this small country to make it recognizable and visible in the city. Become a hub of Latvian culture and activity while supporting recent immigrants and guests from Latvia.

Reach out beyond the Latvian/Baltic sphere. While hosting events and providing resources to support Latvian culture within the diaspora, open the Society's doors to diverse voices, providing a forum for dialogue and interaction with different communities in the spirit of collaboration and exchange.

### **E. SURVEY RESULTS REGARDING A VISION FOR THE FUTURE**

Upon completion of the member survey, the results were tabulated to reveal trends in the membership's preferences in terms of vision and mission scenarios as we look toward the BLB's future. [The survey and a summary of results is presented in **APPENDIX B.**] Two preferences for the future emerged. The following vision/mission preferences rose to the top:

1. **PREFERRED VISION FOR THE FUTURE:** Our respondents tended to favor the concept of creating a "Culture Home." This scenario would promote BLB's basic activities "to be reorganized to support Latvian culture with some on-site programs, but it would also involve a substantial commitment to transform the Society into a virtual center that produces an array of cultural presentations that would reach out to a much broader audience around the country." This approach would mean creating sufficient institutional capacity to deliver a broader range of virtual programs that are of interest to people within the Greater Philadelphia area (both Latvian and non-Latvian) and throughout the United States where Latvian-Americans live.

**Mission:** Create a lively community center that offers a cultural home to new generations of Latvian speakers and to those feeling an affinity to the culture. This home and support system should be directed toward the Society's membership in greater Philadelphia, but should also reach out, through technology, to many diaspora Latvians in the United States -- particularly in locations where they are very isolated. In general, the PSFL should promote and broaden its active membership to include people residing more than 75 miles away from Philadelphia.

2. **A STRONG SECOND PREFERENCE:** A close preference was also expressed for a vision that "connects with people who appreciate *Latvian and Baltic* cultures, both in Philadelphia and globally. The BLB will create a vibrant, welcoming, and supportive community for people with ancestral ties to Latvia and people interested in contemporary Latvian culture, by sharing Latvian traditions, arts, holidays, customs, beliefs, foods, symbols, and language to strengthen the bonds, identity, and sense of

belonging of people of Latvian and Baltic descent. Promote the appreciation and enjoyment of Latvian and Baltic cultures to inspire non-Latvians to understand and embrace a broader, more inclusive, view of the world.”

**Mission:** Create a Baltic-centered “hub” that advances a wider appreciation of Latvian as well as Baltic history, art, music, literature, film, sports, culinary arts, as well as other disciplines. Develop a lecture series and symposia inviting Latvian and other Baltic scholars from Philadelphia and other US regions to present at the BLB. Broaden BLB’ focus and mission to include presentations by Latvian and Baltic specialists who are working on contemporary issues relevant to our times including work in the fields of technological innovation, environmental research, applied engineering, and medicine, etc.

**What do these preferred visions for the future translate in practical terms?**

The preferred two visions suggest that the BLB would reconfigure itself to have a dual role. It would still offer locally based programming for its existing membership, but now under a “Culture Home” or by extension “Baltic Culture Home” concept it would be developed into more of a national cultural or heritage center that reaches out beyond the Greater Philadelphia area. Identification with the organization would be built on the BLB’s 130-year history which began with the founding of the organization in 1892. This long history represents a unique Latvian-American presence in the United States that features accommodation and ability to change as generations change. This rich history provides a strong point of departure for reinventing a new future for the BLB with an opportunity to set a new agenda that is relevant for our times and to connect with new generations of Latvian Americans and outreach to a broader American public.

Through virtual technology, this can be achieved. The organization has the capacity to reach out across the country to build new connections and thereby gain new members who share a general interest in Latvian culture and its people and building a larger base for financial support.

**Given these preferred missions, what are the implications?**

With the adoption of a broader vision and mission statements, the BLB would not only be concerned with organizing and hosting local arts, music, and history events/programs at different times of the year, it would also mean that the BLB becomes committed to having financially sustainable programming that gives the organization greater public visibility in the Greater Philadelphia region and beyond. But adoption of an expanded mission also means that the BLB can no longer function adequately on an all-volunteer basis. It must develop the basic resources to have some staffing capacity that would advance the agenda. It will require money to actually produce virtual programming that reaches out to create a broadened constituency. Contractors would need to be retained in order to deliver exciting programming delivered through the new *virtual center* that would produce an array of cultural presentations on an ongoing basis relevant to wider

audiences. Serious consideration should be given to the possibility of teaming with the Lithuanian and Estonian communities to create a “Baltic Culture Home.”

**F. OTHER OBSERVATIONS MADE BY BLB’s MEMBERS**

A tabulation of responses to the Survey’s “open ended” questions revealed additional support for expanding cultural programming. Committee member Andris Grunde tabulated open-ended feedback from members for three key questions that the survey raised. When asked why the respondent donates to the BLB, the number of mentions broke out with the following count:

**a. Why donate to BLB?**

<b>Mentions</b>	<b>Count</b>
Cultural programming/cultural learning	11
See PFSL for another 100 years/be continued/history	5
Maintain ties to local Latvians/Latvian presence	5
Latvian Community involvement	4
Heritage/history	4
Duty/support organization	3
Fund raising/Philly theater	2
The space/social place	2
Events/programs	2
Become Latvian event headquarters	1
Commitment to Latvia	1
Memories	1
Spouse	1

When asked what the organization’s main strengths were, the members’ response was clear in terms of priorities:

**b. BLB’s Main Strengths:**

<b>Mentions</b>	<b>Count</b>
Cultural gathering hub/space/bar	13
Host events/rent	10
PSFL community/bring together/membership	9
Location/public transit	8
History/collections	5
None/unsure	5
Latvian language/culture/identity	4
Reach out to Philly for Latvian programs	3
Latvian Society name	2

There was considerable concern expressed by the members about the condition of BLB’s building and the need for improvements in the areas of membership development and programming. Respondents’ dissatisfaction breaks out into three primary clusters:

- Building conditions and infrastructure
- Member outreach and membership development
- Programming, events and education

The following chart summarizes other areas where respondents indicated that improvements were necessary. Appendix “B” presents members’ responses in greater detail.

**c: Areas for BLB Improvement:**

<b>Mentions</b>	<b>Count</b>
<b>Building, including:</b>	<b>14</b>
Upgrade kitchen	3
Promote the building	3
Infrastructure	2
Modernization	2
Better physical image	2
Accessibility	1
Modern entrance/lobby	1
<b>Members/Other Parties, including:</b>	<b>20</b>
Communicate with members	4
Energize membership	4
More welcoming to new members	3
Cooperation/organize with Lithuanians/Estonians/Germans	3
Promote participation/outreach	3
More young people	3
<b>Events, including</b>	<b>6</b>
More events/classes	4
Latvian culture classes	2
<b>None/Don’t know</b>	<b>3</b>

**G. ISSUES OF BUILDING MAINTENANCE, ESSENTIAL UPGRADES, AND ACCESSIBILITY**

A central concern that the Future’s Committee had to address for the BLB’s board was current building conditions at the building and necessary improvements as this bears on the issue of whether selling the building should be seriously considered. Aware that Ivars Mežgailis was reviewing existing conditions throughout the building, the Futures Committee turned to him to help us understand what the range of maintenance issues are including essential upgrades and accessibility challenges that face the organization. We were extremely lucky that this problem has been carefully assessed by Ivars who has completed a preliminary evaluation of existing conditions in terms of infrastructure requirements to bring the facility up to a reasonable operating standard.

Very quickly the Futures Committee came to the startling realization of the magnitude of the conditions in the building. And clearly, the fundamental issues associated with the building have a direct impact on our future. The challenges of the building and the major costs that must be incurred to bring the facility up to a reasonable operating standard are significant and carry a major price tag.

Ivars spent some time with the Futures Committee to review his assessment that he has been working on for quite some time. Ivars' analysis includes a rough estimate of the cost of repairs. His findings should be reviewed by every board member and all interested BLB general members. **Appendix "C"** provides Ivars' general facility evaluation which specifies specific conditions of concern with the BLB's building system, interior spaces and access from outside.

In **Appendix "D"** Ivars addresses the issue of handicapped accessibility at the BLB. This is based on accessibility standards that are issued under the Americans with Disabilities Act (ADA). The ADA applies to nonprofit service providers that are generally open to the public. In view of the fact that the BLB's spaces serve general theater audiences, ADA becomes a mandatory consideration. It is important to note that Ivars mentions that none of the BLB's restrooms satisfy ADA requirements. Also, the building lacks appropriate ramps for access.

Finally, in **Appendix E**, Ivars has provided an invaluable document indicating his assessment of major facility maintenance and replacement cost estimates for the BLB. With this document we can see "order of magnitude costs" associated with the challenges that the BLB faces today. Professional assessments of conditions are needed to obtain more accurate readings of cost.

At this point, as Ivars has pointed out to us, determination of costs for completing a full renovation of the building is dependent on a final design, but it is clear that this could be in the range of \$185,000 to \$265,000. Other important considerations to bring the building to contemporary public facility standards would include the cost of building an elevator connecting the floors. But an elevator is not included in this projection.

There are other unknowns. The cost of upgrades could easily occur and to follow good practice in construction costs, an allowance for contingencies should be added. A construction contingency is the amount of money allocated to pay for additional or unexpected costs during a construction project. Typically, a 5-10% calculation of the construction budget should be allocated to construction contingency. This could be in a range between \$10,000 and \$27,000. This does not include other components relating to building image such as the front facade and the image it conveys to the public.

In short, these estimates present the sobering reality of the seriousness of our existing building conditions. They prompt us to carefully evaluate whether the German's Society's interest in buying BLB's building might be a serious option for BLB to consider. The next question that

arises is whether BLB's vision for the future can be achieved at an alternate location given the constraints of construction costs and BLB's general financial position today. The Futures Committee considered several options. These are summarized in Section H below.

#### **H. BLB's FUTURE BUILDING OPTIONS**

- Maintain the existing building with minimal renovations and make repairs as needed. Estimated cost \$5,000 to \$8,000 per year.
- Do a full renovation of the building. Depending on the final design, the budgeted amount should be in the range of \$185,000 to \$265,000.
- Initiate essential repairs to maintain building function and public safety. Start property analysis to determine building value and possible areas for relocation. Estimated cost for this option would be in the range of \$20,000 to \$35,000.
- Sell the building as-is. Search for a new building that meets the organizations wants, needs, location and budget.
- Evaluate the possibility to build a new building on the property of the Latvian Ev. Luth. Church of St John in Newtown Square. The cost of this option would be determined by the plan and design of the building less the property cost.

The Committee's assessment has been that any combination of these options is also possible. The dollar amounts used are "guesstimates" at best. Budgetary costs would be determined with professional involvement. Still another consideration used by groups faced with serious financial issues would be a "lease-back" arrangement that would permit use of the existing building by BLB if the German Society takes ownership. In that scenario activities and types of functions needed by the BLB would need to be negotiated including price specific space requirements and annual calendar requests/reservations for space use. The specific terms would be included in the property sale agreement. This is a solution that the Minneapolis Latvian Society used when they sold their building some years ago, when determined that they determined that they could not afford to maintain their building but still needed a place to hold some activities during the year. Another approach of interest is the "Ligzda" or "Nest" community group project created by Chicago Latvians. For some background on that effort, see:

<https://www.facebook.com/CikagasLatviesuLigzda/>

## **I. WHAT SHOULD OUR NEXT STEPS BE?**

The BLB board should consider the following steps:

- a. Assess the board members' interest in the proposed vision as outlined by the Futures Committee as presented by this summary report,
- b. Project the operational cost and financial viability of BLB to deliver a new set of programs based on the concept of creating a "Culture Home" building and on the idea of a virtual center that would eventually attract and build a wider target audience in Philadelphia and across the United States to generate additional revenue for the BLB.
- c. Determine the scope of a pilot effort needed to launch a "virtual program." Define what sort of BLB personnel requirements are needed to launch such an effort. Is professional grant writing expertise needed?
- d. Consider developing a funding application to the American Latvian Association (ALA) and perhaps other donors/organizations to request seed money to move our programming effort forward?
- e. Evaluate whether a government and corporate funding strategy is possible to create and maintain a Philadelphia-based "Culture Home" initiative. Is creation of a "Baltic Culture Home" a more sustainable goal?" Can we sell a new vision for the future as a sound philanthropic effort deserving of private and public support? Do we have the capacity? Will the younger generation of Latvian- Americans find this a compelling initiative to join and support financially?
- f. Can a futures program realistically as described in this report be launched and be made sustainable in light of the "Future Building Options" scenarios described in section H above?
- g. Which building management option is truly the most realistic in order for us to stay in the building and launch new initiatives?
- h. What are the specific trade-offs of moving the BLB to a new location?

## **J. FUTURE DECISION MAKING AT THE BLB**

Given the vision that has been sketched out above and the complex circumstances that the organization is facing related to existing building conditions and finances, the Futures Committee feels that it is critical that the BLB Board be able to act quickly and deliberately on key issues addressed by this report and others that are on the board's agenda. At minimum, the board should determine which critical goals the BLB must accomplish over the next three years. If our plans only chart 1-2 years out, we are not being realistic as to what needs to be done to mobilize talent and financial resources that are needed to institute real change and to make critical improvements. In fact, the board should be thinking in terms of 4-5 years out at least. The Futures Committee recommends that the board create a permanent leadership team in the form of a new BLB Executive Committee. The executive committee would function as a subset of the Board to help set its priorities and to take key actions to move the organization ahead on a sound footing.



The website for “Boardable,” a management consulting group, succinctly summarizes the way that an Executive Committee functions.

“In an ideal world, all board members can meet at the drop of a hat to develop a strategic plan and deliberate on the best course of action if urgent challenges arise. However, that’s not realistic for all boards, especially large boards with members scattered across the country. This is why most organizations form an executive committee.

“An executive committee is a smaller group of board members elected by their peers to address pressing issues. This group of leaders meets regularly (often with little notice) to make decisions about urgent matters that may alter the course of the organization.

“When organized and run efficiently, an executive committee can drastically improve the governance capabilities of the entire board of directors.

“As the CEO or executive director of a growing organization, you’re constantly looking for ways to stimulate growth and improve your leadership structure. You’re well aware that your organization needs the best leaders possible in order to steer it toward a sustainable future.”

THE EXECUTIVE COMMITTEE	vs.	BOARD OF DIRECTORS
Acts on behalf of the board in urgent situations		Acts as the organization’s primary governing body
Size is typically 3-7 members		Size can be upwards of 30 members
Meets frequently, typically bimonthly or monthly		Meets infrequently, typically biannually or quarterly
Reports to the board and is bound by its organizing documents		Elects members of the executive committee
Has a direct relationship with CEO		Relies on the executive committee to communicate with the CEO



For more details about executive committee functions, visit the Boardable webpage:

<https://boardable.com/blog/executive-committee/#:~:text=An%20executive%20committee%20is%20composed,steering%20committee%20for%20the%20board.>

#### K. CONCLUDING STATEMENT

In conclusion, any long-term strategic plan is not effective without a financing plan because there is no action without money. So as part of the “money goal” for BLB’s strategic plan, we must project how revenue and expenses (including essential capital investments) will flow to BLB over the timeframe of the plan. This then will become BLB’s financing plan. A realistic financing plan needs to be tied directly to a vision for the future as well. It cannot be a reactive approach. This will help us decide whether to sell the building and seek a new physical location or whether we have the capability to regroup and to reconstitute the BLB in terms of a new vision for the future -- a vision that must be sustainable.

Many strategic plans start out strong but wither on the vine because they had no implementation or monitoring plans attached. The monitoring function at the BLB would be carried out by the proposed Executive Committee as outlined in Section L above. BLB needs to include a way to both track progress and define the tactics that are necessary to achieve our goals. By monitoring regularly we can decide whether our strategic plan is in fact moving toward a reality as conceived by our membership’s vision of the future.

# APPENDICES

**APPENDIX A:**

GEOGRAPHIC DISTRIBUTION OF BLB ACTIVE MEMBERS BY ZIP CODE - June 6, 2021

Cities and State	ZIP Code	# Members	DEL.	NJ	PHIL.	PHIL-Collar Counties*	METRO Outlying-**	OUTSIDE Region***	ALL MEMBERS
Boxford, MA	01921	1						1	
<b>Subtotal-Mass</b>		<b>1</b>							
CARLSTADT, NJ	07072	1		1					
WALL, NJ	07719	1		1					
DENVILLE, NJ	07834	1		1					
CHERRY HILL, NJ	08003	3		3					
HAMMONTON, NJ	08037	2		2					
EVESHAM, NJ	08053	1		1					
MOUNT LAUREL, NJ	08054	1		1					
PALMYRA, NJ	08065	1		1					
WESTVILLE, NJ	08093	1		1					
DEPTFORD, NJ	08096	4		4					
MERCHANTVILLE, NJ	08109	2		2					
LAWRENCE TOWNSHIP, NJ	08648	2		2					
<b>Subtotal - NJ</b>		<b>20</b>							
New York, NY	10021	1						1	
New York, NY	10036	1						1	
Brooklyn, NY	11215	1						1	
<b>Subtotal -NY</b>		<b>3</b>							
MECHANICSBURG, PA	17055	1					1		
LANCASTER, PA	17601	2					2		
MACUNGIE, PA	18062	2					2		
KINTNERSVILLE, PA	18930	3				3			
PERKASIE, PA	18944	2				2			
QUAKERTOWN, PA	18951	2				2			
SOUTHAMPTON, PA	18966	3				3			
ARDMORE, PA	19003	1				1			
BROOMALL, PA	19008	3				3			
ASTON, PA	19014	1				1			
ELKINS PARK, PA	19027	1				1			

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Cities and State	ZIP Code	# Members	DEL.	NJ	PHIL.	PHIL-Collar Counties*	METRO Outlying-**	OUTSIDE Region***	ALL MEMBERS
GLENSIDE, PA	19038	1					1		
HATBORO, PA	19040	2					2		
Cities	Biedri		DEL.	NJ	PHIL.	PHIL-Collar Counties*	METRO Outlying-**		
JENKINTOWN, PA	19046	3					3		
MEDIA, PA	19063	1					1		
MORRISVILLE, PA	19067	1					1		
UPPER DARBY, PA	19082	3					3		
HAVERTOWN, PA	19083	1					1		
WILLOW GROVE, PA	19090	3					3		
WYNNEWOOD, PA	19096	1					1		
PHILADELPHIA, PA	19103	1				1			
PHILADELPHIA, PA	19104	2				2			
PHILADELPHIA, PA	19107	1				1			
PHILADELPHIA, PA	19114	2				2			
PHILADELPHIA, PA	19118	1				1			
PHILADELPHIA, PA	19123	1				1			
PHILADELPHIA, PA	19125	4				4			
PHILADELPHIA, PA	19127	1				1			
PHILADELPHIA, PA	19128	2				2			
PHILADELPHIA, PA	19129	1				1			
PHILADELPHIA, PA	19130	3				3			
PHILADELPHIA, PA	19136	1				1			
PHILADELPHIA, PA	19139	2				2			
PHILADELPHIA, PA	19144	2				2			
PHILADELPHIA, PA	19147	1				1			
PHILADELPHIA, PA	19148	5				5			
PAOLI, PA	19301	1					1		
AVONDALE, PA	19311	2					2		
PARKESBURG, PA	19365	1					1		

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Cities and State	ZIP Code	# Members	DEL.	NJ	PHIL.	PHIL-Collar Counties*	METRO Outlying-**	OUTSIDE Region***	ALL MEMBERS
BLUE BELL, PA	19422	2				2			
CHESTER SPRINGS, PA	19425	2				2			
HARLEYSVILLE, PA	19438	4				4			
NORTH WALES, PA	19454	2				2			
POTTSTOWN, PA	19464	1				1			
SPRING CITY, PA	19475	1				1			
Cities	Zip Biedri		DEL.	NJ	PHIL.	PHIL-Collar Counties*	METRO Outlying-**		
WERNERSVILLE, PA	19565	1					1		
READING, PA	19607	1					1		
<b>Subtotal-all PA</b>		<b>85</b>							
HOCKESSIN, DE	19707	1							
WILMINGTON, DE	19801	1							
WILMINGTON, DE	19803	2							
<b>Subtotal-Delaware</b>		<b>4</b>							
LAUREL, MD	20723	1						1	
GAITHERSBURG, MD	20878	2						2	
SPARKS GLENCOE, MD	21152	1						1	
BALTIMORE, MD	21229	1						1	
ELKTON, MD	21921	2						2	
ARLINGTON, VA	22207	1						1	
<b>Subtotal-MD/VA</b>		<b>8</b>							
WINSTON SALEM, NC	27104	1						1	
RALEIGH, NC	27613	1						1	
CHARLOTTE, NC	28210	1						1	
BONITA SPRINGS, FL	34135	1						1	
<b>Subtotal-Southeast</b>		<b>4</b>							
NORTHFIELD, OH	44067	1						1	
ROSELLE, IL	60172	1						1	
<b>Subtotal-Midwest</b>		<b>2</b>							

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Cities and State	ZIP Code	# Members	DEL.	NJ	PHIL.	PHIL-Collar Counties*	METRO Outlying-**	OUTSIDE Region***	ALL MEMBERS
DENVER, CO	80220	1						1	
SEATTLE, WA	98103	1						1	
<b>Subtotal-West</b>		<b>2</b>							
<b>TOTAL MEMBERSHIP</b>		<b>129</b>							

Subtotal-METRO:	4	20	30	48					
Subtotal-PHL Metro Outlying:							7		
Subtotal-Outside Region:***								20	

\* PHIL Collar Counties: Delco, Chester, Montco, Bucks

\*\* METRO outlying counties: Berks, Cumberland, Lancaster, Lehigh

\*\*\* New York, Mass., Maryland/Virginia, Southeast, Midwest, Western US

Percentage per region:	3.10%	15.50%	23.26%	37.21%	5.43%	15.50%	100.00%
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## APPENDIX C: Facility Evaluation

For Philadelphia Society of Free Letts, 531 N 7th St. Philadelphia

August 25, 2021. By Ivars Mežgailis

This facility evaluation is intended to be used for planning purposes only. Estimates of condition or costs are those of the author unless noted otherwise. Author is knowledgeable in facility evaluation, but is not an expert.

Building orientation: West side is the main entrance and faces 7th St., North side faces residential house, East side faces German Society backyard, South side faces Spring Garden St/German Society courtyard.

**Current space utilization:** First floor contains the entry foyer, reception room, library, men and women restrooms, bar, dining/social hall, kitchen, HVAC room. Second floor contains a multipurpose room with a stage. Third floor contains a caretaker apartment (without kitchen) and Society office. Currently The apartment is utilized for storage and a meeting room. Basement has several rooms utilized for storage, coat room, and boiler room. Interior floor plan is as originally built in 1967. An existing structure was partially demolished during the 1967 expansion.

**Roof:** There are three roofs on the facility: Third Floor, Second Floor, Entry Portico. The Second floor (2300 sf) and Third Floor (950 sf) roof was installed in August 2001 (\$12,800.) Roof was stripped to deck, 2 inch ISO insulation, 75 lb felt, and 4mil GAF modified roll, and a coating applied. These roofs were last coated in 2010.

**Building Exterior:** West (front) and North walls are finished with stucco. The West wall and the western portion of the North wall was repaired and coated in 2017. The East wall is a painted building block. The South Wall is finished in two styles of architectural brick. This wall was evaluated in 20XX by a structural engineer.

**Windows:** All windows are uncoated/filmed single pane glass in aluminum frames as originally installed. The South wall first floor windows have metal security bars installed. Some panes of glass are cracked. Two panes of West wall windows were replaced and window units repaired and caulked in 2007 (\$3900).

**Land:** Accessible land is the concrete sidewalk on the west side (front) of the building and a concrete 4 foot wide alley walk along the entire South Side. The sidewalk is in fair shape. Recent repaving of 7th Street has resulted in a street curb that is less than 2 inches. Vehicles are now parking partially/mostly on the sidewalk on the entire block. The South wall alley is in good condition. The South alley has settled and slopes down toward the building. The building adjacent is on slab or crawl space. Water intrusion is not suspected. The yard drain in the alley



is probably clogged and where it discharges to is unknown. The alley is security gated between the building and the German Society Fence.

**Floors:** First Floor is a mix of original building floor structure, 1967 new floor structure, cement slab, and crawl Space. Floor covering includes old growth pine board, carpet, laminate wood (installed 2017 (\$2000)), and vinyl.

Second floor is a mix of original structure and 1967 steel beam structure. Floor finish is oak hardwood. Hardwood was last refinished in 2019 (\$4000?) and fully refurbished about 5 years prior. Third floor is the original building structure finished with laminate, vinyl tile, and hardwood.

**Walls:** walls are mostly drywall, except in first floor library, where they are plaster.

**Ceiling:** First floor is suspended ceiling, except for Library ( Original plaster) and restrooms (drywall). Second floor has a suspended ceiling in the alcove and the rest is exposed roof deck, Third floor is drywall.

**Utilities:** All utilities enter the building from the west wall (7th Street). Water is provided in a  $\frac{3}{4}$  inch line by Philadelphia Water Dept. Natural Gas is Provided by a 1 1/2 inch pipe by Philadelphia Gas Works. Gas is used in heating the majority of the building, hot water, and kitchen stove. Electric is provided by two service lines. One is 200 amp 220V three phase power. The other is 150 amp 220V. The three phase power is connected to the two Main HVAC condenser units and a power panel for temporary stage lighting. Oil is stored in a 275 gallon tank in the front room of the basement. Oil is utilized to heat the western three floor section of the building (foyer, stair tower, library, restrooms, bar, second floor alcove, entire third floor. Sewer line is 6 inch, leaving from the west wall. Sewer is combined with sanitary and storm. Storm is from the roof collectors. Facility pays a fixed storm water disposal fee \$40, which is 40% of the Water/Sewer invoice. Fire alarm system refurbished/expanded 12/2019 (\$3890), which is not remote monitored. No security system in the facility.

## **Condition evaluation:**

Utilities:

**Water:** Most of the piping is original from 1967 expansion. There are several dead legs. Hot water heater is located in the very back of the building on the first floor. Heater installed in **XXXX** There is a delay to get hot water to restrooms and significant delay to get hot water to third floor restroom due to piping distance.

**Sewer:** unknown. The air gap fixture and underground lateral that serves the bar sink has clogged in the past. A review of bar sink soaps is recommended due to scumming/foaming at air gap. The constant parking or movement of cars over street vent could cause damage to the street lateral.

**Electric:** mostly installed in 1967. Additional power line installed to service the stage was installed in 2007 (\$2950). Wiring could have current code non conformity. Building main power line metal conduit on outside the building and through the wall is corroding.

**Gas:** metal pipes which run through the basement may be corroding due to higher humidity.

**Oil:** Tank and line to boiler replaced in 2006. Appears in good condition. Tank is not fully accessible.

Exterior:

**Roof:** The second floor roof has some bubbles. Ponding of storm water on the roof has been reported. This has not been evaluated fully, but a couple of small areas do have accumulated dirt. Some cracks were filled with roofing compounds in 2021. No leaks found. The Third floor roof sustained storm damage and was repaired in 2018. Leaks repaired in 2021. Roof Warranty expired in 2013. Roof is near the end of its useful life. Applying in-house stock of roof coating on the third floor roof is recommended. Coating second floor roof should be evaluated. Portico roof history not known.

**Walls:** brick pointing mortar in South wall needs to be evaluated. Eastern half of North wall stucco needs repair, and preventive coating. East wall needs preventive coating. West wall (street) is in good condition. Basement interior walls need mortar maintenance due to age and water intrusion.

**Sidewalks:** Street sidewalks are cracking and uneven. Parking on the sidewalk is concerning. Damage is cosmetic rather than safety at this time. South alley drainage toward building a concern but not a problem at this time. Placing leveling cement would be the least cost.

**Windows:** Need caulking. Not thermal barrier efficient, especially against solar heat in summer. Cracked panes need repair. Some frame/hardware needs maintenance/replacement.

**Insulation:** minimal to none in exterior walls. Roofs have 2 inch insulation boards under the roof covering and above deck.

Interior:

**Walls:** walls are in good condition overall. In the bar hallway the partition walls pulling away from the outside wall needs evaluation and repair.

**Floors:** structurally floors are good except for one joist under women's room. See basement water intrusion comments. Floor coverings are in good condition. Reception room carpet needs cleaning. Kitchen needs new floor covering.

**Ceiling:** First Floor: leak stains in tiles in dining room and kitchen. Need to investigate cause and replace. Ceiling tiles in the dining area are getting worn from theater groups removal of some for their needs. The ceiling track in the kitchen and dining area have rust stains. In the second story alcove, the tiles and track are getting worn/damaged from theater group use. Tiles last replaced 2017. Third floor is in good condition. Main stair tower landing ceiling to third floor damaged from third floor roof leaks.

**Kitchen:** counters, cabinets, floor are in poor condition. Dumbwaiter has been problematic in the past.

**Fire:** A fire occurred in the apartment caused by an electrical malfunction in the early 2000's. Damage was contained to the living room and rest room. Apartment damage was fully remediated and renovated.

**HVAC:** The HVAC which serves the eastern  $\frac{2}{3}$  of the building (bar, dining, kitchen, second floor/stage) is near the end of useful life. Air Handler replaced in 2006 (\$5700). Condensers replaced in 2005 (\$5500). Air Handlers have had blower motors replaced in 2019(\$1000). These units have been problematic. Air Handlers units are undersized for this building. During the cooling season, half of the first floor air flow is diverted to the second floor. Ducts are not designed to efficiently handle the diverted flow and could cause blower motors to burn out. In the cooling season, we run AC for the entire building instead of just the second floor, where we have renters, resulting in increased energy cost and additional wear and tear. Ducts have separated and cause distribution unevenness. The boiler was replaced in 2006 (\$5400). The boiler serves heat for bar, restrooms, library, entry foyer/stairs, second floor alcove, and third floor. Radiator size in the women's restroom causes the space to become overheated. Boiler chimney needs brick mortar repair and crown repair.

**Water intrusion into basement:** Water seeps/flows into the basement in the North and East walls. Water flow occurs in the middle corridor section of the North wall. Flows are short term 15 - 60 minutes and occur independent of rain events. This section of wall abuts the PHA Housing unit. Flow enters the basement near the basement ceiling, which is a couple of feet below ground level in northeast neighbors' yard, and below first floor level of PHA building. Flow collects and passes through the floor openings and makes its way to the boiler room sump pump. A small area of floor is wet. Wall is constantly damp. Other areas where dampness occurs along the wall/floor seems to be rain event dependent. An water intrusion event which occurred in 2019 resulted the floor in the front room to be coated in mud. This intrusion event's cause has not been determined. The intrusion seepage is a problem the German Society had until new external foundation drains were installed there. Ground water may be high in this neighborhood.

**Costs (July 2021 guesstimates):**

**Reroof:** \$12,000 - \$25,000

**Windows:** Replacement: Front: \$15,000 - \$25,000; 2nd floor: \$10,000 - \$18,000, 1st floor: \$5,000 - \$8,000. Repair and recaulk \$6,000

**HVAC:** First Floor: direct replacement \$8,000 - \$10,000. Second Floor: minimal expansion: \$12,000 - \$17,000. All new systems with new ducts, at least \$40,000.

**Water intrusion:** ?

**South side alley drainage :** \$10,000

## APPENDIX D: ADA Accommodation Evaluation

For Philadelphia Society of Free Letts  
August 9, 2021  
By Ivars Mežgailis

The Philadelphia Society of Free Letts building at 531 N 7th St has several ADA challenges.

The first floor is 32 inches above the building entrance. The first floor is 28 inches above the side entrance walkway. The entrance doors are of sufficient width. The floor to floor elevation from the first floor to the second floor is 12 ft 9 inches. Currently the front stairs have a stair chair lift. The current front stair width is minimally sufficient for life safety codes. However the stair chair lift does intrude into the width. On the first floor doors from corridors into rooms are of sufficient width except for restrooms. The women's restroom entrance offset does not satisfy ADA requirements. **None of the restrooms satisfy ADA requirements.**

An aluminum ramp can be installed in the alley on the South side of the building for ADA entrance from the side door. A second ramp would be installed to provide safe access to the back side door. The guestimate cost is \$6500 to obtain the ramp with inhouse install.

A Wheel Chair lift can be installed in either the Lobby or Library to provide ADA access to the second floor. A wheel chair lift can only accommodate one person at a time. The floors in these areas would need to be reinforced to accommodate the lift. A footprint of about 5 ft x 5 ft is required with a 4 ft x 5 ft access clearance for entering lift. The guestimate minimum cost to install the lift is \$35,000. A multiple person ( four person max) elevator would cost more. Lift install, structural renovations would be completed by contractors. The lift enclosure could be completed in house.

The restrooms would require a total redesign to accommodate ADA toilet stalls. A new single restroom could be installed utilizing Library space of 7 ft X 7 ft. The guestimate cost for restroom upgrade is \$25,000. Plumbing would need to be completed by contractors due to cast iron pipes. The rest could be completed in house.

New entrance ramp:	\$ 6,500
New Wheel Chair lift	35,000
Rest Room upgrade	<u>25,000</u>
	\$66,500

This evaluation is provided as a conversation starting point. The next steps would be a detailed evaluation of codes and the need for expert consultation.

**APPENDIX E: Facility major maintenance/ replacement cost estimates**

Prepared by Ivars Mežgailis

**Roof:**

	Min \$	Max \$
reroof:	15000	25,000
recoat:	3000	

**HVAC**

replace air handlers/condensers		
first floor	8,000	10,000
second floor	12,000	17,000
total redesign/replace	50000	75,000
replace boiler	6000	10,000

**Windows:**

West (main)stair tower	15,000	25,000
Second floor multipurpose room	10,000	18,000
First floor	5,000	8,000
Repair/recaulk existing windows		6,000

**Beer cooler:**

3,000

**South side alley sidewalk**

10,000
--------

182,000

**Basement water intrusion:**

?

**ADA Accommodations:**

entrance ramp for side door	6,500
wheel chair Lift	35,000
<b>rest room rebuild</b>	25,000
	\$66,500

These cost estimates are based on my knowledge of facility systems, and internet cost searches. They are provided as a first step preview for planning purposes by Valde and Planning Committee. All costs require a scope of work prepared and a cost estimate from a qualified contractor obtained if budgeting or fundraising is planned.

Ivars Mezgailis