

2019 Evanston History Center Strategic Vision

The Vision

At the end of fiscal year 2019, the community will recognize the Evanston History Center as an extraordinary cultural resource, because the Center will be exploiting its greater capacity to collect and preserve Evanston history; its collections will be more accessible to researchers; and its exhibits and programs will be reaching a larger and more diverse audience, at Dawes House, on the web and in the community through partnerships. These more extensive operations of the History Center will be sustainable because of a larger membership base, because of new recurring-income streams, because of additional rental-event revenues, and because recent improvements to Dawes House will have reduced its operating and maintenance cost. The center's annual budget will be balanced and the endowment will be protected.

Collect and Preserve Evanston History

Additional Renovations Completed, Accessibility Improved

What's true today:

Board has retained AltusWorks to outline a third phase of improvements of Dawes House (largely exterior masonry repairs) with costs estimated at a total \$1.83 million, and develop detailed specifications of those improvements. The Center currently has maintenance contracts for the heating and cooling systems of the house, the coach-house boiler and the elevator (but not the roof). There is an Evanston History Center sign at the front of the walkway that leads to the front door of Dawes House, and it is lighted at night. When the research room is open, a sign is posted near the front of Dawes House directing visitors to its entrance, and another is posted when Dawes House is open for tours.

Vision for July 2019

All exterior masonry walls, the masonry balustrade around the terrace, all staircases and the main entrance to Dawes House have been renovated. All structural repairs have been made to the Coach House. Accessibility and navigability have been improved.

Proposed actions:

(1) Repair, repoint and clean the exterior masonry walls of the entire Dawes House and complete restoration of the terrace as per plans developed by the facilities committee with Altusworks. (2) Restore the main entrance of Dawes House, including front door and exterior front stairs, and repair exterior back stairs. (3) Repair floor of Coach House to structural soundness. (4) Develop a plan to install some or all of the landscaping designed by O.C. Simonds for the Dawes family. (5) Assess the desirability of and enter into any further necessary maintenance contracts for all major structural and mechanical systems of the house and the Coach House, including the roof and HVAC systems. (6) Investigate east-side signage.

Collections Storage Plan Implemented

What's true today:

EHC has an index of all processed archival collections available on its website, complete with descriptions and finding aids. About a third of these have been recorded in the Archives Tree database (to which there is a link at the web site). The Center does not have a full inventory of artifacts that satisfies museum standards, but has initiated appraisals of condition for many of them. Information about artifacts has not yet been recorded in Archives Tree. Staff continues to systematically identify artifacts for deaccession and to sell them at auction, creating a significant source of revenue (\$13,400 in FY2016). There has been no systematic assessment of risks to the collections.

Vision for July 2019

A plan for storing the collections at minimal risk has been implemented so that items in the collections are identified and documented, are receiving adequate care, and are accessible. State-of-the-art methods for collecting archives are being evaluated and updated methods have been implemented.

Proposed actions:

(1) Complete an inventory of 50% of the artifacts stored on the third floor, with priority to be given to items to be lent to outside organizations, recording information about these artifacts, as well as all archives, in Archives Tree. (2) Deaccess artifacts and documents that are either unrelated to Evanston history or duplicates. (3) Monitor current museum and library methods of collecting, storing and archiving items, artifacts and data.

Systematic Collection of Contemporary History Initiated

What's true today:

Although the Center accepts contemporary artifacts and documents, it is not yet systematically seeking them (it does not, for example, regularly make and store copies of websites, such as the City of Evanston website). The Center does not yet have a capability to accommodate "digital" documents, such as e-mail archives and websites.

Vision for 2019

The History Center systematically seeks and incorporates into its collections contemporary artifacts and documents to preserve modern history for the future. Collections are being expanded through the use of contemporary methods and equipment appropriate to contemporary media.

Proposed actions:

(1) Staff will consult with outside experts from three to five peer institutions on state-of-the-art equipment and methods for archiving contemporary artifacts and information, including digital data. (2) Staff will develop a plan to add contemporary artifacts and documents, including e-mail archives and copies of websites, to the collection.

Exhibit and Interpret Evanston History

Artifacts Exhibited at Other Locations and on the Web

What's true today:

In conjunction with "The Underground Railroad: Photographs of a Path to Freedom" in early 2017, EHC partnered to display parts of the exhibit at Shorefront and the Evanston Art Center. EHC staff give talks at other locations, such as Presbyterian Homes and the Evanston Public Library, and lead walking tours in the neighborhoods; and any organization can book one of the Center's four "portable history programs" for any venue in Evanston. EHC has lent items from its collections to museums seeking them for exhibits, such as costumes for the Museum of Science and Industry. Partnering with other organizations to develop and display exhibits and programs has been identified as a priority. Except for the Evanston sesquicentennial exhibit of maps, the Center has not used its website for exhibits.

Vision for 2019

EHC partners with other organizations and venues to share and showcase exhibits, information and events. EHC also lends artifacts to organizations with space to exhibit them, making more space available at Dawes House and displaying artifacts that might otherwise not be viewed by the public. Photographs and explanatory notes of artifacts in exhibits are available on the EHC website. The website also provides online access to a portion of artifacts from our collection not on exhibit, including photographs of and detail about those artifacts. The website is considered and used as EHC's face to the world, providing comprehensive information about exhibits, activities and collections that draws and informs the public and encourages support of EHC.

Proposed Actions:

(1) Partner with at least one organization annually on an exhibit. (2) Review website and make changes consistent with current goals, and continue to monitor website to ensure it meets changing needs. (3) Review the inventory of artifacts to determine items that can be displayed in other locations and free up space at Dawes House. (4) Seek opportunities to lend to other organizations artifacts that EHC has no room to exhibit, including the Twiggs printing press. (5) Contact the Pritzker Military Museum and request the assistance of an expert to document the EHC gun collection, and if desired, lend it to that museum on an on-going basis. (6) Make exhibits available on the website after Dawes House exhibits have closed.

Progress Continued on Database Collections, Index Available on the Web

What's true today:

The website describes the scope of the Center's archival collections and provides a list of all processed archival collections. There is also a link to the Center's Archives Tree database, including description and finding aid for about a third of archival collections. Information about artifacts collections has not yet been recorded in Archives Tree and is not available at the Center's website. The scope of the Center's artifact collections is suggested in website lists of some of the paintings, furnishings, and toys in the collections; in the 40 photos of artifacts and five of costumes on Flickr; and in "Curator's Picks" on the website.

Vision for 2019

Information about all archives and half of the artifacts collection has been recorded in Archives Tree, providing extensive resources for staff and researchers. The online index to Archives Tree, accessible through the EHC website, offers researchers detailed information about the collections.

Proposed actions:

(1) Complete entry of information about all archives in Archives Tree. (2) Continue entry of information about half the artifacts collections in Archives Tree. (3) Train all staff to use Archives Tree. (4) Provide a comprehensive and up-to-date index to our collections, accessible from the EHC website. (5) Enhance accessibility and knowledge of the collection to the public through social media.

Programs Draw More Diverse Audience

What's true today:

Topics for recent exhibits and many Under the Buffalo lectures have been selected in part because of their appeal to community members who have not often attended History Center programs, such as African Americans and young adults.

Vision for 2019

The audiences for programs are much more diverse, reflecting Evanston's diverse population. Community groups are informally involved in program selection and planning. Lectures and exhibits on contemporary topics and issues provide historical perspective.

Proposed actions:

(1) Involve diverse community groups in planning where appropriate. (2) Annually conduct a minimum of three exhibits, programs or lectures geared to socially diverse audiences. (3) Informally invite diverse groups to share historical information. (4) Investigate the feasibility of conducting tours in Spanish. (5) Continue to partner with organizations that can expand our audience reach.

Enable the Financial Sustainability of the History Center

\$1.4 Million Raised by the Conclusion of the Public Phase of the Capital Campaign

What's true today:

\$2.6 million of the total \$4 million goal was raised in the beginning and initial public phases of the campaign. A dedicated Campaign Committee chairman, volunteers and staff continue to obtain gifts (through means such as crowdfunding and a "brick" campaign), and the debt incurred for the second phase of improvements has been repaid.

Vision for 2019

The conclusion of the public phase of the Evanston's History, Evanston's Home Capital Campaign has yielded the goal of \$1.4 million.

Proposed actions:

- (1) Prioritize capital projects to do by 2019 and determine sub-projects for possible donor underwriting.
- (2) Develop a project to raise funds for the capital campaign.
- (3) Close out the bricks campaign by June, 2017.

Plan for Maintaining Campaign Momentum Developed

What's true today:

There is no plan to take advantage of the campaign experience to increase both the total number of gifts and the number of large gifts to the Annual Appeal. Although the average gift to the Annual Appeal in FY2016 (\$238) remained about the same as in FY2015 (\$231), the total number of gifts declined from 192 to 172 and, consequently, total gifts declined from \$44,537 to \$41,004.

Vision for 2019

The "Evanston's History, Evanston's Home" capital campaign has concluded, but the History Center has a plan for maintaining momentum from the campaign – for continuing to obtain gifts, often major gifts, from a larger proportion of Evanstonians and others with an interest in Evanston history.

Proposed action:

Develop a plan to take advantage of the visibility and giving experience afforded by the capital campaign to increase both the total number of gifts and the number of large gifts that the EHC receives annually.

More memberships purchased and renewed

What's true today:

At the end of FY2016, there were 567 History Center memberships (including life memberships), representing a decline from prior years. Despite a well-defined procedure for reminding members to renew their memberships each year, there is significant attrition in renewals.

Vision for 2019

The number of dues-paying EHC members has increased significantly. A large majority of memberships are renewed.

Proposed actions:

A.) Member Acquisition

- (1) Promote membership signups at EHC events.
- (2) Offer discounts for members at lectures, walking tours, travel outings and other events.
- (3) Renew and update brochures and website descriptions to convey advantages and benefits of membership.
- (4) Consider both broad-based and segmented direct-communications strategies, such as mailings, to encourage participation and membership among a wider range of Evanstonians, especially under-represented social groups.
- (5) Target non-member users, such as guests at EHC events or Research Room users, for membership.

B.) Member Retention

- (1) Focus Development Committee and staff attention on problem of member attrition and low renewal rate.
- (2) Organize telephone interviews of non-renewing members to encourage renewal and identify

reasons for non-renewal; if a pattern emerges, act to correct cause. (3) Explore alternate membership renewal options such as multi-year renewal at discounted rate, automatic renewals, and soliciting lapsed members by mail or e-mail.

Planned Giving Program Implemented

What's true today:

The Center has not introduced a planned-giving program.

Vision for 2019

EHC has implemented a planned-giving program.

Proposed actions:

(1) Develop and initiate a campaign to seek planned gifts. (2) Annually acknowledge people who have included EHC in their giving plans at an event, such as a dinner. (3) Investigate engaging an outside professional to design a program for planned giving.

More Revenue Derived from Dawes House Rentals

What's true today:

Revenue from non-program rentals of Dawes House exceeded \$20,000 in FY2016 (total rental revenue, including coach-house rental revenue, was \$58,600, exceeding budgeted revenue by about \$14,000). Coach-house rental is steady. There is a significant number of bookings for July and August (previously unfeasible since the house lacked an air-cooling system.) Dawes House is currently advertised as a venue for weddings in "Here Comes the Guide." Staff of the Illinois Film Office has toured Dawes House, and it was the site of a "Chicago PD" TV shoot in early 2017, yielding an added \$11,000 in rental income.

Vision for 2019

More frequent rentals of Dawes House are yielding significantly more revenue for the History Center operations without significant wear of the house and its furnishings.

Proposed actions:

(1) Take advantage of new HVAC systems and the conservatory patio to rent Dawes House more frequently, particularly in the summer, for business meetings, conferences, small weddings, concerts and pop-up events. (2) Continue to seek television and film productions at Dawes House by maintaining relationships with the Illinois Film Office and location scouts.

Recurring-Revenue Sources Maintained and Developed

What's true today:

The Annual Appeal and the Mother's Day Housewalk have been the main sources of operating income for the EHC for years. In 2016, a summer gala, Melody in August, was instituted, potentially as an annual event, and in March, 2017, EHC On the Go was launched as an on-going travel program with a recurring-revenue stream.

Vision for 2019

In addition to the Annual Appeal, the Mothers' Day Housewalk, the MELODY IN August gala, and EHC On the Go, EHC has at least one additional source of recurring revenue annually.

Proposed actions:

(1) Maintain or increase levels of participation in the Annual Appeal, Mothers' Day Housewalk and MELODY IN August gala. (2) Initiate and conduct at least two EHC on the Go tours to historic places annually. (3) Consider new programs to generate recurring revenue.

Resolution to Adopt a Vision of the Evanston History Center in July 2019

Evanston History Center Board of Trustees

Adopted May, 2017

Whereas the Board of Trustees of the Evanston History Center is responsible for determining the Center's policies, which include the long-term plan or vision for the Center, which guides the Center's staff as they formulate specific plans for management of the collections, provision of research facilities, programs and exhibits, and management of the Center's financial resources; and

whereas the last vision adopted by the Board was a vision of the Center at the end of 2016; and

whereas the Trustees and Strategic Vision Committee has developed a vision for the end of fiscal year 2019 that reflects both guidance from trustees and staff and consideration of what is logistically and financially possible over the next 30 months;

therefore the Board of Trustees resolves to adopt the attached "Vision of the Evanston History Center in July 2019 and Proposed Actions to Realize that Vision," which presents what the Board and staff would like the History Center to have achieved by the end of fiscal year 2019 and proposes actions for staff to take to realize that vision. However, the Board acknowledges that staff, drawing on their expertise or advice from the Center's committees, or adapting to changes in available resources or other new circumstances, might choose to take different actions if they believe this is more likely to result in realization of the vision for July 2019. This strategic plan will be reviewed, altered and updated by the board in the last quarter of 2019 and a successor plan for at least three more years will be developed by a committee composed of board members representing each standing committee and preferably at least one member of the 2013 or 2016 strategic planning committee.