



**Charlevoix Historical Society  
Annual Report  
2021**

**MISSION STATEMENT**

*Enriching Charlevoix culture through preservation, education  
and engaging experiences celebrating our history*

**HISTORICAL SOCIETY OFFICERS AND BOARD OF DIRECTORS**

**President:** Denise Fate

**Vice-President:** Tom Darnton

**Secretary:** Susan Van Wieren

**Treasurer:** Jamie McLane

**Finance Chair:** Craig Mann

**Directors:** Lindsey Dotson, John Duerr, Ole Lyngklip III,  
Robert Molter, Edward O'Neill, Amanda Wilkin

**Advisory Board:** Chuck Cleland, Phyllis Elzinga, Steve Paterka

**Manager of Operations:** Trevor Dotson

**Museum Curator and Editor:** David L. Miles

## Message from the President

Given that 2021 remained a year with challenges emanating from the on-going pandemic with new variants popping up periodically, the Society was able to realize a number of successes throughout the year.

Last year we committed to be more diverse and inclusive in our programming, and we started early in the year doing just that, focusing on the history of Indigenous people of the area. The most lasting and visible project is signage on the Pine River channel with an overview of the history spanning a period of 12,000 years, up to the present. What a rewarding experience this was for all who participated! Members of area tribes joined with us to support and provide invaluable contributions to the initiative, which included a number of outstanding events. We are extremely grateful for their guidance and participation, and owe a particular debt of gratitude to Jessica Dominic, Sammie Dyal, Eric Hemenway and Sandra Witherspoon for their essential assistance. We hope that this successful collaboration, a landmark project for the Society, will pave the way for future opportunities to share the stories and first-hand voices of the Charlevoix area's Indigenous peoples.

The Cultural Corridor event "How Pine River Became Charlevoix" on July 31 at Charlevoix Public Library featured Indigenous culture along with the story of Father Pierre Francois Xavier de Charlevoix passing by the area 300 years ago, and was very well received.

Based on demand, we ordered the second printing of *Boulders: The Life and Creations of Earl A. Young in Charlevoix, Michigan*, and sales continued to be strong. The book was recognized with a second award: a Historical Society of Michigan's State History Award.

I am pleased that a team of volunteers, staff and board members are making good progress getting our photo collection organized, with the support of a grant received from C3F to fund archival materials and a part-time employee.

With the book sales, the generosity of our members and patrons, the return of events at the depot and groups coming to tour Charlevoix, our revenues returned to levels prior to the pandemic.

In November, the Society was very honored to be named the recipient of the Crooked Tree Arts Council's eddi Award for Arts & Cultural Organization.

Over the course of the second half of the year, the long-planned renovation of the 2nd floor of the Harsha House was completed. Much of the original plaster and flooring from the 1940s and earlier was removed, repaired or replaced making a beautiful workspace for our staff and storage area for artifacts.

I want to thank the Society board for their devotion and leadership, and staff for their professionalism and dedication.

Denise Fate, President



Unveiling the new sign in October



Crooked Tree Arts Council eddi Award winners

## Manager of Operations Report

Just like in recent years, there was much renovation work planned for the Harsha House in 2021. The main project consisted of renovating the south half of the second floor of the Harsha House into better office, work, and collection storage space. In order for the contractors to begin, the Society's collection of objects and ephemera had to be moved. In January board member Ole Lyngklip and I began the task of organizing, boxing, and labeling objects. From January to March I relocated all objects to other storage locations in the Harsha House, or to the Congregational Church next door, where the church graciously permitted the use of a lockable storage room.

To ensure that we provided programming during the ongoing Covid-19 pandemic, the Society decided to go virtual via the Zoom platform. I led off with a program titled *Then & Now: Images of Charlevoix*, where present-day images of Charlevoix were superimposed over images from the past. Curator, David Miles presented three other programs during February and March. All were well attended and received. They were also recorded and uploaded to the Society's new channel on YouTube. I hope to grow the content on our YouTube channel during 2022. In addition, I further increased the Society's presence online by creating an Instagram page which currently has around 500 followers.

Members of the Little Traverse Bay Bands of Odawa Indians (LTBB) were invaluable in making the Cultural Corridor's (Charlevoix Public Library, Circle of Arts, and Historical Society) July event *How Pine River Became Charlevoix, 1721-1869*, an engaging and educational experience through traditional singing and dancing, storytelling, and craftwork. The Society will continue to work with LTBB to provide inclusive history of the area's Indigenous people.

In June, the Society was excited to receive a grant from the Charlevoix County Community Foundation to hire an intern, Jessica Dominic, to assist with digitizing the vast *Charlevoix Courier* photograph collection. Jessica was an easy choice as she has previous museum experience and was already assisting the Society in creating the latest historical sign and with the CuCo event. During the year Jessica digitized over 1000 *Courier* photographs, and digitized and catalogued numerous others.

In July, curator David Miles and I hosted three separate groups of 20 campers from Camp McSauba at the Harsha House. We provided a program on the history of the Mt. McSauba area and Chief Louis McSauba for whom the area is named and gave them a museum tour. The campers were very engaged and had many questions about objects in the Harsha House. This is the second time David and I have provided a presentation for Camp McSauba and we plan to continue, rotating between going to the camp one year and the campers coming to the Museum the next.

With people feeling more comfortable about traveling, the museum was much busier this summer than in 2020. We again had visitors from all over the United States coming to see our exhibits and conduct research. It was a joy to meet so many people and I hope to see even more guests in 2022.

Trevor Dotson, Manager of Operations

## Curator's Report

2021 began with the uncertainty that surrounded Covid, but the Historical Society adjusted. Instead of the usual in-person programs, we shifted gears with prior programs modified to shorter versions on the Zoom platform. They were very satisfyingly received. My first and second were presented in March, on Charlevoix's hotels and the railroad's arrival here in 1892. April concluded the series with the schooners and palatial yachts that came to Charlevoix over the late 1800s to 1941.

Word of this reached North Central Michigan College in Petoskey, which soon invited us to participate in its Lifetime Learning Club program, also on Zoom. The first one done, in May, was my program on how our 2020 publication, *Boulders: The Life and Creations of Earl A. Young in Charlevoix, Michigan* was put together. This was followed by a repeat of the hotels program in November, with requests for more after the new year.

July 31, 2021 was the 300<sup>th</sup> anniversary of the passage of Jesuit priest Father Pierre Francois Xavier de Charlevoix by this area destined to receive his name. We marked the occasion with a month-long exhibit and an event on the 31st at the Charlevoix Public Library, also with activities at Charlevoix Circle of Arts. At the library, it was explained how that name came to be applied to both the county, and later the village at its northwest corner. Adding cultural entertainment and expertise to the event were a historian of the French presence in North America and performers and artisans from the area's Indigenous tribes. The event was very well attended.

Our engagement with the Indigenous people began with asking for input for another historic sign, our eighth, to be placed on the north side of the lower channel leading to Lake Michigan. The sign focuses on the native presence over the whole region, to the Atlantic, and also on the local presence and history. This reach-out for inclusion and diversity turned out to be one of the most rewarding experiences of my years with the Society.

2020 saw our step-on bus tour guide business, covering the Earl Young Mushroom House and the town, dwindle to a sparse six. 2021 rebounded to a highly gratifying tenfold and more.

The year was capped by two awards: the Historical Society of Michigan's State History Award for Outstanding Michigan History Publication for *Boulders*, and the Crooked Tree Arts Council's eddi Award for area arts and cultural organizations. The Charlevoix Historical Society has no time to sit still.

Part of the year was spent sorting through and scanning three loans of photos, negatives and slides into high-resolution images for our photo digitization project. The scanning is the preliminary step before entry into the Past Perfect photo and metadata program, which entails transfer of the photo and entry of all the relevant information involved in constructing a photo history and catalog plus search capability. The Society already has over 10,000 images entered into Past Perfect.

David L. Miles, Curator, Museum at Harsha House

## Membership Report

The Membership Secretary is responsible for maintaining lists of current members by category, issuing letters for membership renewal and sending acknowledgment letters for Patrons, Ralph Hamilton Circle renewals and donations. Email acknowledgments are sent to the remainder of the annual members renewing. This year we welcomed twenty-one (21) new members. The process for renewing was streamlined, and so far it seems to be working well. More and more, people are taking advantage of the website for online donations and renewals.

Annual membership dues remain a significant source of income for the Society and help cover day-to-day expenses. The Society wishes to thank all members and donors for their generous support of the Charlevoix Historical Society.

<u>Membership:</u>	<u>Donation Level:</u>	<u>Members:</u>
<u>Category:</u>		
Life Members	One-time donation of \$1000	112
Annual Members	Individual, Family, Ralph Hamilton & Patron (Family counted as one member)	<u>248</u>
	<b>Total Membership:</b>	<b>360</b>

Within our Membership are those who support the organization each year by becoming Ralph Hamilton Circle Members or Patrons, including Life members who make additional annual gifts:

Ralph Hamilton Circle Members with an annual gift of \$150 or Patrons with an annual gift of \$350 - \$3,000 or more (includes membership in the Ralph Hamilton Circle)	50  47
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Although the total membership number is slightly down this year, membership dues received of \$42,725 are about the same as 2021, thanks to the generous donations received from Patron members.

Often families choose to honor loved ones with honorary gifts or memorials. These gifts are greatly appreciated and help us continue our work in preservation and restoration. This year, memorial donations took on a larger role as the Society was named as the beneficiary for several members or Charlevoix residents who passed.

Every year the Society hosts a reception for its Ralph Hamilton Circle members as a way of saying "Thank you for your support". The theme of the reception at the Depot on September 1 was celebrating Indigenous culture in the area. We were so fortunate to have "Voices of Greensky" perform (pictured at right below), as well as artwork and artifacts on display, and catering featuring native dishes.

Susan Van Wieren, Secretary



## Museum Committee

The Museum Committee members are Ed O'Neill, Chuck Cleland, Trevor Dotson, John Durr, Ole Lyngklip, and David Miles. The committee is charged with overseeing activities related to the collection including acquisition, cataloging and organization, access, preservation and restoration, and the creation of exhibits. The goal is to preserve our physical artifacts and to make our digital resources readily accessible both onsite and online.

Museum staff and volunteers were very productive during 2021 with digitizing and cataloging items donated to the museum. In the first half of the year, staff, along with intern Jessica Dominic, and board member Ole Lyngklip digitized and cataloged nearly 300 photographs into our collections management system, PastPerfect. An additional 64 three dimensional objects were also cataloged. These photos and objects are now available for visitors to the museum to view within our PastPerfect database, and can further assist with their research as well as our own. Also during the first half of the year, Ole volunteered his time to organize, number, and house thousands of photos from the *Charlevoix Courier* donation in archival sleeves and boxes. These photos are now ready to be digitized.

In mid-July, we ceased cataloging photos and objects into PastPerfect so that our current metadata could be reviewed and revised. This was the perfect time for Jessica to focus on digitizing the photos from the *Courier*. Jessica digitized around 1000 photographs from the *Courier* collection, and volunteer Kitty Warner digitized nearly 200 more. David Miles digitized around 550 loaned photographs from three different donors. All of these photos can now be cataloged into our already vast photograph collection.

### **Metadata Project Status:**

The revision of the cataloging metadata was completed in 2021 and is ready to be loaded into a new museum collections software system. The primary focus was on the creation of authority files, the application of authority control, and general metadata enhancement. Authority files were created for persons, subjects (topical, geographic, corporate names, titles, and events), and genre.

**Name authorities:** The authority file for personal names following FAST and Library of Congress (LC) practice and guidelines. The authority file established names for 5,446 people with 330 cross-references and 1,165 other references. While most of the corrections were made in the first phase of the project, an additional 871 corrections were made in the second phase.

**Subject authorities:** The subject authority records were either taken from the FAST authority file or created consistently with the FAST guidelines. Cross-references were created to link invalid subject terms to an equivalent established heading. The resulting subject authority file contains 2,846 established headings with 741 cross-references and 6,265 other references. While many corrections were made during the first phase, an additional 8,863 corrections were made in the second phase.

**Genre authorities:** The Getty Art & Architecture Thesaurus (AAT) was used to identify the genre. The genre authority file contains 687 headings from the AAT thesaurus with 1,295 other references. Applying the AAT genre headings required assigning a new genre heading to every catalog record.

Trevor Dotson, Acting Museum Chair

Edward O'Neill, Metadata Project Manager

## Publicity and Marketing

In 2021 the Charlevoix Historical Society was still dealing with the pandemic situation, so many marketing and promotional initiatives were reduced or put on hold. We were able to reintroduce some programs after the year hiatus.

Our step-on motor coach tours of the Mushroom Houses regained momentum with 65 tours. Dave Miles also conducted seven walking tours. Nearly 200 Mushroom House guidebooks were sold during the year.

Earl Young's Mushroom Houses have become a very popular attraction for the Charlevoix community, so much so that the homeowners have had some issues with increased traffic and rogue trespassers. We assure our membership and the community that we are a good partner and steward for the homes. The motor coach tours through the Historical Society are respectful and keep people in the areas where they are allowed (on pavement). In addition we have updated our brochure to include verbiage about the homes being privately owned and to be respectful of privacy. The Mushroom House self-guided tour brochures were again one of the most popular brochures given out in Charlevoix.

The Society placed a cooperative advertisement with the Charlevoix Cultural Corridor (CuCo) in the Charlevoix Guide which printed 45,000 copies. The digital version was also viewed over 50,000 times.

The Society's email newsletter ended the year with 340 subscribers and a higher-than-average open rate (53.9%) which has helped keep the Society's offerings top of mind.

The Facebook page grew by 290 followers, and an Instagram account was started and gained almost 500 followers in one year. More important than followers is the great engagement our posts have received with comments and shares. The Society's website has been updated periodically throughout the year to reflect events, exhibits and an overall fresh appearance. The membership section was revised to be more user-friendly and store products were also rearranged to have more impact.

In the Museum store at Harsha House, sales were up 36% compared to the prior year. Much of the increase is attributed to Dave Miles' hit book: *Boulders*. We have seen an increase of online sales. We are looking to improve the appearance of the store and better promote it in 2022.

Amanda Wilkin, Marketing and Publicity Chair

## Buildings and Grounds

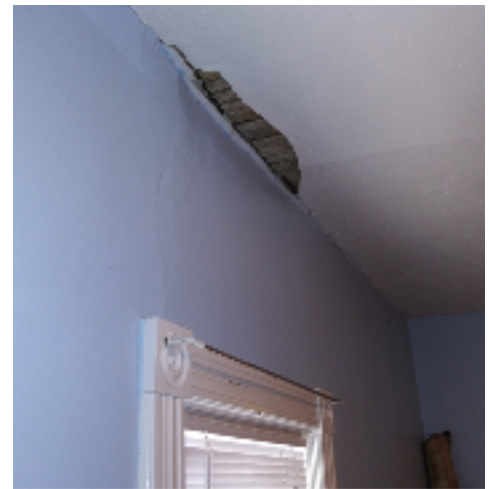
2021 saw a complete overhaul of half of the 2<sup>nd</sup> story of the Harsha House Museum to fulfill needs related to artifact storage and curator workspace. Since this area of the historic home had not been updated since they were converted into apartments years ago, this was a significant project. Taking recommendations made by Rick Neumann in our Master Plan document, we worked with contractor Robert Jess of Freshwater Charch to accomplish a great task. Installing adequate HVAC systems for the proper storage and care of artifacts plus lighting for workspaces also meant upgrades to the electrical system in the home. Carpet was removed to expose hardwood flooring, plaster was repaired and repainted, and a bathroom was put back into working order with new fixtures and amenities for staff use.

Now the south side of the 2<sup>nd</sup> story is poised and ready for our curators to set up their workspaces, complete with great lighting, preparations to upgrade I/T systems, a new employee restroom, and a clean slate for the organization and storage of the museum's artifacts and artwork collection. With this project complete, the Historical Society looks forward to constructing an addition off of the museum annex of the Harsha House to serve as a fire-resistant storage vault so that our photo collection can be safely and properly stored for decades to come.

Lindsey J. Dotson, Buildings & Grounds Chair



Condition before



After renovation





## Programs and Events

In 2021 our schedule was a mix of in-person and online programs delivered via Zoom to remote audiences. The Society's Zoom programs started on February 10 when Trevor Dotson presented "Then and Now: Images of Charlevoix" - a pictorial journey through Charlevoix using images from the 19<sup>th</sup> & early 20<sup>th</sup> century overlaid with images of what that location looks like today.

On March 23<sup>rd</sup>, Dave Miles did a program titled, "'The Railroad in Charlevoix'", which describes the complex maneuvering that transpired to bring the first railroad to Charlevoix in 1892, the last of the major northern Michigan communities to receive one.

A program titled "Schooners and Palatial Yachts of Charlevoix" was presented by Dave Miles on April 20 and surveyed the era of the schooners and palatial yachts that once made our channels and lakes picturesque beyond compare.

All of our Zoom programs were recorded and uploaded to the Society's YouTube channel.

The Society was asked by North Central Michigan College's Lifelong Learning Club to present a lecture in conjunction with their History Hounds program. Dave Miles talked about "Boulders: The Life and Creations of Earl A. Young in Charlevoix, Michigan" on May 17, also via Zoom. He explained how the Society's latest publication came to be written and offered a look at Earl's artistic development from the time of his first creation, 1919-1921, to the completion of his last work in 1973. This same program was presented by Dave Miles in person at the Charlevoix Public Library on September 14.

Our return to an in-person program at the Depot was on June 29 when Society board member, author, and renowned expert on Indigenous history, Chuck Cleland, presented a book talk on his latest work titled: "Further into the Wilderness: The Culture of the Great Lakes Indigenous People in the 18<sup>th</sup>-19<sup>th</sup> Centuries".

On July 31, the Charlevoix Cultural Corridor marked the occasion of the 300<sup>th</sup> anniversary of the date that Jesuit priest, historian and explorer Father Pierre Francois Xavier de Charlevoix was known to be near this area. The event took place at the Charlevoix Public Library and Charlevoix Circle of Arts. Guests learned about the region during this period and the Anishnabek, whose physical and spiritual home this locale has been for centuries. They called it *Zhiingwaak Ziibiing*, or Pine River. At the Library, there were kids activities, a Historical Society exhibit, quill artwork on display, Indigenous storytelling and a program on the voyageurs by an interpreter from Mackinac State Historic Parks. Bear River Pow Wow Singing and Dancing Group, featuring Raymond and Leroy Shenoskey performed. The event was very well attended and received.

A special program called "The Architecture of Jack Begrow" was presented on July 18 at the Depot by Begrow's daughter, Janet Begrow Chambers. The late Harold Jack Begrow, AIA, was a renowned architect in Charlevoix for more than 40 years.

In December, we were so pleased to be able to revive our Holiday Dinner at Grey Gables and usher in the holidays with a nice-sized crowd.

Denise Fate, Acting Chair



(l) Raymond and Leroy Shenoskey at the Library Garden on July 31.

(r) The *Jimaan* used to traverse Lake Michigan



## Finance Committee

The Charlevoix Historical Society was again financially successful in 2021. Many thanks to our generous members and patrons for their gifts. Also many thanks to our employees, officers and board members for their hard work and teamwork, which made our success possible. In summary, here are some highlights:

- Members and patrons gave close to \$43,000 in donations, on par with last year.
- Memorial donations took on a larger role as the Society was named as the beneficiary for several members or Charlevoix residents who passed. Gifts totaling \$10,670 from generous donors all over the country were received.
- A raffle held for unique experiential prizes was conducted and raised close to \$4,000.
- Store sales, including the book **Boulders** were very strong at \$25,500, an increase of 35% from the previous year.

Balance sheet assets increased during the year due to capital improvements, and our cash balance at year-end totaled \$91,117, down \$10,686 from the prior year. The society remains in a good financial position to continue its mission well into the future. Thanks again to all who helped make this possible.

Craig Mann, Finance Committee Chair

## Volunteer of the Year

The Volunteer of the Year was announced and presented at the Society's holiday dinner at Grey Gables Restaurant in December. The recipient was Jessica Dominic, who as a member of the Little Traverse Band of Odawa Indians played a crucial role on the Society's task force on diversity and inclusion. She devoted much time, energy, experience and knowledge to the group as we navigated difficult topics and varying opinions. We were lucky to find her early in the year, and even more fortunate to learn that she loves history and working with museums. So, by June she was actually engaged as a part-time employee.

Denise Fate, President



## Embrace.Preserve.Cherish. Capital Campaign

Over the course of 2021, \$77,698 in contributions were received, including the grants awarded. Balances at year end totaled \$103,698 in the endowment fund, and \$92,515 available in the non-endowed capital funds. Projects which were completed with capital funds in 2021 included renovations to the 2nd floor and electrical upgrades at the Harsha House, at a cost of approximately \$88,000, \$50,000 of which was covered by a single benefactor gift.

Projects planned for 2022/23: I/T upgrades (est. \$25,000) to improve the security and performance of the computers systems, a new roof and other repairs and restoration at the Train Depot (est. \$50,000+) and fire-resistant collections vault at the Museum at Harsha House for the storage of the photo collection (cost tbd).

For the gifts received in 2021, we would like to express our sincere appreciation to all donors (listed below).

Denise Fate, Co-Chair

### 2021 Donors:

Gary & Denise Fate  
Mike & Kim Foster  
Frey Foundation  
Jon B. and Lisa Mower Gandelot  
Bill and Pam Gnodtke  
Constance Hagelshaw  
Ralph & Mary Lynn Heid  
Ole Lyngklip Jr.  
Joseph A. Paradis III  
Ken & Shirley Polakowski  
David & Joan Robinson  
Julia Taylor  
USDA Rural Development Grant



**EMBRACE. PRESERVE. CHERISH.**

# Members of the Charlevoix Historical Society, 2021

## Patrons:

### **Diamond Level (\$3,000 or more)**

Robert J. & Zeze Jess\*, Ole Lyngklip III

### **Platinum Level (\$2000 - \$2999)**

Adrienne Osborne Ives\*, Craig & Deborah Mann, Paul & Linda Weston

### **Gold Level (\$1000 - \$1999)**

Mike & Rhea Dow\*, Virginia Ewing\*,  
Paul & Sally Hoelderle, Lynne & Mason Rosenthal

### **Silver Level (\$500 - \$999)**

Ace Hardware, Belvedere Club, Patrick & Beth Camilleri,  
Charlevoix Commercial Center, Charlevoix State Bank, Brian Dooner,  
Fr. Pierre Knights of Columbus, Denise & Gary Fate\*,  
Grey Gables Restaurant, Ralph & Mary Lynn Heid\*,  
Kay & Don Heise, Dale & Diane Herder, Richard & Perry Irish Hodgson,  
Katherine Liggett, Nu-Core, Inc., Ed O'Neill & Susan Kroll,  
Joseph Paradis III\*, Richard & Diane Platt, Mary Taylor,  
Susan Van Wieren, Jack & Katherine Weber, David & Judith Wilson, John S. Wilson\*

### **Bronze Level (\$350 - \$499)**

Thomas & Maryalice Armstrong, Vincent & Mary Ann Chew,  
John & Jeri Duerr\*, Phyllis Elzinga, Stefany Freeman, Robert & Jan Grupp,  
Bill & Dottie Holmes, Tom & Sue Kirkpatrick, Ken & Nancy Kline, Denise Leduc,  
Michael Lindley, William & Linda McLaughlin, Lisa Miller,  
Visit Charlevoix, Don & Vicki Voisin\*, Jerry & Sandy Willis

### **Ralph Hamilton Circle Members**

(Patron Sponsorship includes Circle Membership)

Mary Adams\*, Marsha Baird, Julia Ann Bandfield\*,  
Charles Bingham, Walter & Lynn Bleakney, Steve & Marsha Braun,  
Stanley & Jennifer Harsha Carroll\*, Roger & Sheila Christensen, Chuck & Nancy Cleland,  
James & Lori Dane, Tom Darnton, Dick & Jan Dille, Gerard & Alicia Doan,  
Charles & Jane Duerr, Ted & Marilyn Dumbauld, Lynn & Janice Evans, Mike & Kim Foster,  
Joanne Friedman, Joan Funk, William & Pamela Gnodtke, Ellen J. Goldstick,  
Steve & Sue Goslee,, Steve Hansen\*, Joyce & Bruce Herbert, Janie & Ervin Hire,  
Kristin Jones, Jocelyn Laurent, Kathie & Steve Libert, Kip & Linda Linklater,  
Joan & Chuck MacGillivray, David L. Miles, Richard & Linda Mueller\*,  
Gretchen Olsen, Steve & Kathy Paterka, Chris & Ginger Payne,  
Kevin & Gay Peters, Barry & Karen Pierce\*, Ken & Shirley Polakowski, Jeff & Nancy Porter,  
Roger & Cynthia Postmus, Joy Ann & James Price, Jerry & Connie Rogers, Robert Schrock,  
Buck & Cindy Scott, Danna & Wade Segrest, Site Planning, Inc.,  
Mark & Valerie Snyder, Beth Strawbridge, Tom Toomey, David Williams

## **Family Members**

Leanne Ackert, Suzanne Ackert, James & Patricia Aikin\*, Ruth Augustine, Bruce and Susan Auten, John & Debbie Belfy, Rick & Jean Belvin, Cathy Benson, David & Martha Boprie, Richard Brandi, Jeff Brown, Jennifer Brown, Deborah Buchanan, Randall & Sharon Bytwerk, David & Suzanne Campbell, Bill & Judy Carey, Pat & Mike Carland, Bob & Ruth Chapman, Eugene & Nan Ruth Chardoul, Dave & Julie Christiansen, Mike & Eileen Chrzanowski, Jo Ann Cline, Beth and Christopher Cowie, David E. & Elizabeth Domann, Richard & Connie Dexter, Trevor & Lindsey Dotson, Charles & Julia Eisendrath\*, Clint & Audrey Etienne, Toni Felter & Ann Gorney, Virginia Finney-Lahde, Bill & Karen Foss, Jonathan & Lynn Friendly, Peggy & David Gallinat, Bill Gardiner, James & Christel Gibbons, Dennis Halverson, Charles & Nancy Harpham, Nancy Harrison\*, Gordon & Sharon Hassing, Michael & Christine Heroy\*, Lesley Hershman, Carol & Jon Hisey, Andrew & Stephanie Hittle, H. Daniel Jones III, Robert Kaplafka & Laura Keyes, Anne Kelly, David Kirkpatrick, Sharon Knutson, Tammy Legenza, Dr. Jack MacKenzie, John & Vera McKown, Jamie McLane, Robert & Kimberly Molter\*, Gary & Kathy Moore, Loren Musilek, Michael & Laurie Nedelman, Paul & Joan Nowak, Jay & Sally O'Connor, Marita & Angelo Parrish, Meredith Patton, Leandra Peak, Keith & Laura Podob, Carl & Barbara Roehling\*, Marty & Jerry Richardson, Don & Judith Schneider, Lore Silberman\*, Dr. & Mrs. Jerome Sitner, Larry & Dorothea Smith, Bill & Betsy Stewart, Jim & Elise Straus, Donald Swank, John & Anne Teesdale, Ronald & Carolyn Weislik, Daniel Tukel, Susan Tukel, Kathyrn and Douglas Vance, Joseph & Christie Vogelheim, R.J. Waddell, Phillip Wampler, Cindy Whitley, Joseph & Beatrice Wollam, John & Anna Young

## **Individual Members**

Barbara Adams, David & Lillian Arnold, Anna Austin, Susan Barnett, Joseph Beaudoin, JoAnne Beemon, Renae Bennett, Susan Brochu-Hoshield, William & Gloria Broder, Julie Carmody, Geoffrey & Lynn Coleman, Aimee Cooper, Sara Cowan, Katherine Craig, Emily Crook, Dean & Joyce Davenport, Ryan Deery, Billie D'Entremont, Renee Durbin, Beverly Eby, Charles Ervin III, John Farrow, David & Nancy Fowler, Linda Campbell Foy, Catherine Francis, Lawrence Freedman, Roberta & Peter Gluck, Marsha & Steve Hall, John Mason & Mary Hart, Linda Harvey, Tina Heugh, Bradley Jones, Barbara Kopitz & William Lichtig, Jackie Krutsch, Amy Lalewicz, Jayne Larion, Kate Left, Larry Levengood, Lois Lewis, Georganna Monk, Marilyn Novak, Charlene Novotny, Mrs. Robert Ogle, Jan Olach, Charles Paterka, John Porter, Judith Primak, Ann Puffpaff, Jordan & Rhoda Raider, James Reamsnyder, Geoffrey Reynolds, Jane Rodgers, Davonne Rogers, Steven Seely, Jo-Ann Seitzinger\*, James Skelly, Mick Smith, W.C. Smith, John Soderman, Mary Beth Soellner, Carol Stephan, Paul Stephan, Kate Stewart, Wayne Sundberg, Sally Suomela, Joseph & Carolyn Surico, Richard and Mary Ann Throop, Kitty Warner, Janet Williams

## **Life Members**

Rebecca Allard, Patty Beck, Michael & Mona Bergeon, Thomas Bickersteth, Thomas Bleha, Lowell Blossom, Dick & Sheilah Bogart, William & Erika Brewer, Michael Brode, Sylvia Burns, Virginia Cash, Patricia Chamberlin, Barbara Danly, Pat & Nancy DeCastro, Thomas DeKorte, D.P.M., Marjory Dinwiddie, Bruce Douglass, Joyce Duke

\* Also a Life Member

# Charlevoix Historical Society

## Income Statement

January - December 2021

	Total
<b>Revenue</b>	
Grants Income	
Foundation and Trust Grants	15,021
Capital Campaign thru CCCF	15,000
Capital Campaign Income	59,500
Total Grants Income	89,521
Contributions	
Individ, Business Contribution	7,949
Legacies and Bequests	10,671
Contributions	18,619
Investment Income	2,175
Membership Dues & Assessments	42,725
Misc Sales	170
Shop Sales	25,319
Museum Admissions	2,187
Depot Usage	3,900
Special Events Income	13,877
<b>Total Revenue</b>	<b>\$198,494</b>
<b>Total Cost of Goods Sold</b>	<b>9,565</b>
<b>Gross Profit</b>	<b>\$188,929</b>
<b>Expenditures</b>	
Museum Expenses	12,163
Membership Expenses	2,295
Depot Building Expenses	6,277
Fundraiser & Special Event Expenses	3,235
Harsha House Building Expenses	8,986
Operations Expense	14,299
Historical Society Payroll Account	67,082
Depreciation Expense	29,039
<b>Total Expenditures</b>	<b>\$143,376</b>
<b>Net Revenue</b>	<b>\$45,552</b>

**Charlevoix Historical Society**  
**Statement of Financial Position**  
**As of December 31, 2021**

	Total
ASSETS	
Current Assets	
Cash in Bank Accounts	\$91,117
Accounts Receivable	667
Other Current Assets	42,633
Total Current Assets	134,417
Fixed Assets	
Depot Building	395,354
Harsha House	412,167
Furniture and Equipment	57,037
Land - Operating	68,945
Signage	20,929
Accumulated Depreciation - Investment Assets	-510,319
Total Fixed Assets	444,113
TOTAL ASSETS	\$578,529
LIABILITIES AND EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	398
Michigan Department of Treasury Payable	213
Total Current Liabilities	611
Long-Term Liabilities	
Refundable Deposits Payable	2,950
Total Long-Term Liabilities	2,950
Total Liabilities	3,561
Equity	
Opening Balance Equity	92,028
Unrestricted Net Assets	437,388
Net Revenue	45,552
Total Equity	574,968
TOTAL LIABILITIES AND EQUITY	\$578,529

## Near Term Society Goals (2022-2024)

The goals were established by the Board of Directors and staff.

### Membership:

- Increase overall number of members to over 400 with \$40,000+ in dues, and the share of Ralph Hamilton members and patrons
- More extensive communications to promote membership, including social media
- Solicit corporations for sponsorship or patronage
- Explore options for auto-renewal and sustaining memberships

### Public Relations/Marketing:

- Increase marketing of popular profitable items
- Enhance retail operation, focus on unique merchandise
- Social Media and Website: content & development planning
- Partner with Visit Charlevoix on Pinterest as feasible
- Continue support of bus and walking tours
- More exhibit promotion

### Programs and Events:

- Record or Live-stream programs from the Depot and Library, and build our program content on YouTube
- Continue to integrate diversity, equity, inclusiveness into programming, esp. Native American history in the area
- Engage youth in more of our activities
- Plan creative and engaging fundraising events
- Partner with Cultural Corridor on engaging seasonal events

### Buildings and Grounds:

- Develop maintenance and inspection plans for all properties
- Evaluate security systems

#### Depot

- 2022/23: Make minor cosmetic repairs per assessors recommendations and regrade bricks for improved accessibility
- 2022/23: Exterior repairs and restoration - chimney, roof, gutters
- Make building accessible to visitors more often and freshen exhibits

#### Museum at Harsha House

- 2022/23: Construct fire-resistant collections vault
- Improve interior ramp for accessibility
- 2024-25: Replace/repair systems per engineering recommendations: boiler and plumbing; relocate gift store to rear entrance

#### Lighthouse

- Make a decision on restoration of foghorns (replicas) and report to National Park Service
- Concrete base repair, paint touch-up on ladder
- Minor interior paint & window maintenance



**Museum Operations:**

- Collections Management:
  - Upgrade or replace Collections Management System
  - Organize, catalog and inventory artifacts in the collection in methodical fashion
  - Acquire sufficient archival materials
  - Courier Collection
    - Protect all photographs
    - Organize / Catalog another 2-4 years of photographs
- Prepare next major exhibit on Maritime History for 2023
- I/T Upgrades, including server and network
- Secure funding and manpower for on-going needs to digitize and catalog the Society's large photographic collection
- Construct fire resistant storage vault for photograph collection
- Revisit policies for accessioning and deaccessioning artifacts, as well as photo policy
- Provide proper storage equipment and organize collection in Harsha House
- As part of the Charlevoix Cultural Corridor, attract visitors and engage community in the museum
- Work with Charlevoix Main Street as advocates of historic preservation, in particular for Charlevoix's historic buildings
- Develop a museum strategy, in particular for exhibit space and collections management
- Continue evolving as the leading center for historic research in Charlevoix
- Nomination of Harsha House for the national register of historic places

**Financial:**

- Promote the *1892 Legacy Society*
- Stay ahead of major financial needs for each property and raise sufficient capital funds through grants and donations
- Increase operating funds to meet expanding needs, in particular payroll, staffing and collections management
- Initiative to raise funds from national corporations with area presence

**Staffing:**

- Ensure proper HR tools available
- Cross-train Manager in all functions of operation and develop for professional growth
- Board / Chair recruitment, including succession plan for President by end of 2022