



Charlevoix Historical Society Annual Report 2022

VISION

A vibrant Charlevoix inspired by its history

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 / Janet Kohler

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, Steve Paterka

Manager of Operations: Trevor Dotson

Museum Curator and Editor: David L. Miles

Message from the President

Throughout 2022 the Society celebrated 50 years since our 'rebirth' in May of 1972. We marked our Golden Jubilee with a program by Dave Miles, and a fundraising event in June. It was an excellent time to revisit and learn even more about the origin of the Charlevoix Historical Society, which dates back to 1879. The Society was first incorporated in 1887, and was a vibrant Society, a little different in nature but covering a wide variety of topics in their programs. Thank you to all who have supported us over these last 50 years, and to the visionary leaders who got the Society on its feet again, namely Ralph Hamilton and Bob Miles.

With strong store sales, bus tours, private events at the Depot and the generosity of our members, patrons and grantors, we had another successful year financially.

Much time and effort was spent this year preparing for upcoming projects, laying the groundwork and raising funds to upgrade our I/T hardware and software, for a new roof at the depot and a fire-resistant vault to secure our collections of photographs.

I am especially pleased to have been able to recruit new board members, including a Secretary. Janet Kohler is the 4th generation in her family to be Charlevoix Historical Society members and the 3rd to serve on the board of the Society. How lucky we are to have Janet in our midst, and for her family legacy. It is truly a remarkable story. Though many families go back in Charlevoix for generations, to have them represented on one organization's board spanning so many years is pretty special. Geoff Reynolds has joined the board as an advisor. Geoff has a long history with the Society and the museum, along with his late mother Betsy. He and his wife recently retired back to Charlevoix.

I want to thank the Society board and staff for their dedication and support throughout the year.

Denise Fate, President



Janet Kohler and Jennifer Harsha Carroll
at the Golden Jubilee



Amanda Wilkin, Rick Brandi and
Maureen Radke at the Golden Jubilee

Manager of Operations Report

2022 began with the decision to reconfigure and refresh the exhibit *Beautiful Charlevoix. The Art and Influence of Irene Harsha Young*, which featured her paintings in the Harsha House dining room. Many of the paintings were on loan and needed to be returned but those in the Society's collection were rehung in the formal parlor. I, along with Harsha family descendant and Society member Jennifer Harsha Carroll, worked on two new interpretive signs, one that focused on the Harsha family and the other on Irene Harsha Young and her artwork and influence in the community. We also refreshed the interpretive content about the Harsha family, telling visitors more about who they were and their lives in Charlevoix.

In the dining room, I rehung the small exhibit *How Pine River Became Charlevoix, 1721-1879* that David Miles and I put together for the Cultural Corridor event of the same name held at the library in the summer of 2021. The exhibit covers the history of the Indigenous people in the area prior to white settlers arriving, Father Charlevoix's travels in the area, the early settlers and the naming of Charlevoix.

In January the Charlevoix Public Library asked if I would participate in the Great Michigan Read program and later provide a presentation about the year's chosen book. The book was a historical fiction piece, *The Women of the Copper Country* by Mary Doria Russell. I held my presentation at the library in April to a nice size crowd. Many had read the book, which made the program more enjoyable for all.

By spring, the museum committee had finished their metadata project (ensuring information is as accurate as possible in our database) and agreed to "unlock" our collections database to allow objects and photographs to be cataloged again. I spent much of the spring cataloging objects and photographs into the database. It is important to keep up with cataloging because the Society receives many donations throughout the year. We received object/photograph donations from 45 separate individuals in 2022.

The summer was filled with visitors to the museum, and most enjoyably, speaking with and assisting them. The Cultural Corridor promoted gift shop sales and outdoor fun and games in conjunction with the city's summer business open house. The Society had croquet for guests to play and light refreshments available on the porch. Turn-out was good and the Society received a handful of new members.

In the fall the Lions Club asked if I would be their guest speaker at an October meeting at which I presented my "Then & Now: Images of Charlevoix" program. I spent the majority of the remainder of 2022 cataloging objects into our database while also working with David Miles and board member Ole Lyngklip on selecting objects and photographs for display in the upcoming 2023 maritime exhibit and determining the exhibit's overall layout.

Trevor Dotson, Manager of Operations

Curator's Report

2022 began with the uncertainty that surrounded Covid, but to a much lesser degree. I was able to finally present a live audience program at the train depot in May, part of our wonderful celebration of the 50th anniversary of the reorganization of the Historical Society in 1972. Prior that, at the end of March we relied on Zoom, as we had in 2021, for a repeat program on the life and works of my father, local photographer Bob Miles. They were both very satisfyingly received. I also was able to present a program at the Charlevoix Public Library in honor of former Society Board member the late Cynthia Postmus.

North Central Michigan College in Petoskey, for the second year, invited us to participate in its Lifelong Learning Club program, also on Zoom. My first program, in January, was on the coming of the railroad to Charlevoix in 1892 and its aftermath. This was followed by the schooners and palatial yachts program in February. Both events had participants from coast to coast with very positive feedback.

At the end of April, I traveled to Lansing to the Library of Michigan's ceremony recognizing the recipients of its Notable Book of the Year award, which our 2020 publication *Boulders: The Life and Creations of Earl A Young in Charlevoix, Michigan*, received in late 2021. Because of Covid, the Library could not hold the ceremony the two previous years, so the 2019, 2020, and 2021 recipients were honored in a combined event that attracted over 250 people.

Also in April, after approval from the Board of Directors, I began formulating content, both images and texts, for our next exhibit that will replace the one mounted in 2018 on the *150 Years of Photography at the Charlevoix Historical Society*. The five years devoted to that one was unintended, but the onset of Covid combined with a torn up work area on the museum's second floor, necessitated leaving it up for an extra year or two. The new exhibit, a maritime history of Charlevoix, will be ready by mid-2023. With the assistance of my colleague at the Museum, Trevor Dotson, and Board member Ole Lyngklip, we began selecting from a huge batch of candidate photos, laying out the requisite wall spaces to receive them, and writing accompanying texts during the summer. Work continued for the remainder of the year.

2022 saw our step-on bus tour guide business, covering the Earl Young Mushroom Houses and the town, rebound to a healthy 80, with all four step-on guides, myself included, back on the job. Buses arrived here from as far away as California, spreading word about Charlevoix nationwide.

The year was capped by the enormously gratifying statistic for sales/distribution of *Boulders* reaching the 999 mark on December 31. It reached the milestone of 1000 on January 4.

David L. Miles, Curator, Museum at Harsha House

Membership Report

The Membership Secretary is responsible for maintaining lists of current members, planning and executing the membership renewal campaign, and sending acknowledgments for renewals and donations. This year we welcomed thirty-seven (37) new members. During the Golden Jubilee celebration in June, we offered new memberships for \$2.00 - the rate in 1972!

Annual membership dues are a significant source of income for the Society. The Society wishes to thank all members and donors for their generous support.

Membership: <u>Category:</u>	<u>Donation Level:</u>	<u>Members:</u>
Life Members	One-time donation of \$1000	110
Annual Members	Individual, Family, Ralph Hamilton & Patron (Family counted as one member)	<u>241</u>
Total Membership:		351

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	48
or	
Patrons with an annual gift of \$350 - \$3,000 or more	49
(includes membership in the Ralph Hamilton Circle)	

Although total membership is down slightly, membership dues received were very strong at \$48,851 - a 14% increase over 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.

Every year the Society hosts a reception for its Ralph Hamilton Circle members as a way of saying "Thank you for your support". It was again held in the beautiful Heritage Garden in September (pictured below), with entertainment provided by singer songwriter Charlie Millard.

In November, Susan Van Wieren stepped down from the Secretary position after four years of dedicated service, for which the Society is very grateful.

Susan Van Wieren, Secretary (Jan-Oct) and Janet Kohler, Secretary (Nov-Dec)



Museum Committee

The museum committee members are Ed O'Neill, Ole Lyngklip, John Duerr, Trevor Dotson 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.

Over the past three years, the committee has been revising the metadata from our current collections management system (CMS) PastPerfect 5 in order to have the most accurate data possible when the time comes to upgrade to a new CMS. This project was completed at the end of 2021, at which time the committee planned to upgrade to PastPerfect Web Edition. However, after reviewing PastPerfect Web Edition more closely, the committee determined that it did not sufficiently meet all the requirements we would like to see in a CMS.

The committee approached the Historical Society board in February about hiring a consultant to research available CMS systems. The board approved and Ole Lyngklip and I then began the process of contacting prospects. The committee contacted six consultants and after speaking with several of them, we chose History Associates Inc. out of Rockville, Maryland. The committee and History Associates worked together over the course of the spring and summer via Zoom conference calls and phone calls. Two representatives came to the museum for a site visit in October so they could interview staff and volunteers on how we use our current CMS and what we would like to see in a new CMS. They also documented our current work procedures, processes, and policies. In December, History Associates provided the committee with their report for review. The museum committee reviewed the report and had follow-up discussions with them to provide our feedback. At the end of the year, History Associates was in the process of revising the report for final review in early 2023. The museum committee will use this report to determine which CMS will be the best fit for the Society.

In conjunction with moving to a new CMS system, the committee determined the Society needed to upgrade our computers and IT infrastructure. The committee, along with President Denise Fate and board member Bob Molter, interviewed and received plans from three IT companies. The committee agreed to a plan and quote from Common Angle out of Petoskey, which was then approved by the Society Board. IT upgrades are scheduled to start in spring 2023.

Museum staff and volunteers were very productive during 2022 with digitizing and cataloguing items donated to the museum. The Society received grant funding to allow intern Jessica Dominic to work part-time, and she assisted greatly with cataloging and the overall organization of the collection.

Trevor Dotson, Acting Museum Chair

Publicity and Marketing

By keeping an active presence in the community through public relations and marketing, the Historical Society remains relevant and in turn effective in fulfilling our mission. Real praise in the Publicity and Marketing arena for the society go to Dave Miles for his countless hours of work in his authoring of his books and the Looking Back articles in the newspaper, to Denise Fate for her authoring of the many press releases that go out during the year touting Historical Society events and happenings and to Trevor Dotson for his consistent posting on social media and updating our website.

During 2022 we were able to get back into some of our more significant community outreach activities. Our step-on motor coach tours of the Mushroom Houses regained momentum with 80 tours. Dave Miles also conducted seven walking tours. Nearly 200 Mushroom House guidebooks were sold during the year.

Earl Young's Mushroom Houses continue to be a very popular attraction for the Charlevoix community. We are keen to this boon for the economy, which is overall a positive, but does leave some community members frustrated with the flurry of spectators. We have helped to educate the public that these homes are privately owned and should be viewed as such. The Mushroom House self-guided tour brochures, which include verbiage about the aforementioned issue, 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 55,000 copies. The digital version was also viewed over 50,000 times.

The Society's email newsletter ended the year 2022 with 385 subscribers and a higher-than-average open rate (60%) which has helped keep the Society's offerings top of mind.

The Facebook page grew by 495 followers, and the Instagram account grew over 20%. 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 good, but below prior year levels as sales of the highly successful book *Boulders* slowed. Our marketing efforts have kept the Charlevoix Historical Society top of mind within the community and beyond.

Amanda Wilkin, Marketing and Publicity Chair

Buildings and Grounds

The buildings were for the most part in a maintenance mode in 2022, as projects for further repairs and expansion were being planned and funded.

At the Harsha House, equipment and furnishings were being acquired to relocate and organize artifacts and artwork in the newly remodeled space on the second floor. Offices will be relocated during 2023 within the lower level and upstairs. This will also create more exhibit space in the museum area.

Funding is being sought for the roof replacement and chimney restoration at the Depot. This project has been deferred for the last few years, as other projects took priority, and the Society was advised by an architect that the roof would hold on for a while longer.

The pergola at the train depot garden is also in need of repairs, and an assessment is needed to determine the best manner in which to do it.

Plans and funding are in place to make significant improvements to the lawn, beds and drainage system in Depot Heritage Garden, thanks to an anonymous donor. These will be done in 2023.

Lindsey J. Dotson, Buildings & Grounds Chair

South Pier Lighthouse

Minor repairs were made to the lighthouse this year, and more are planned for 2023. The touch-up painting which was done will help prevent erosion and protect the coating and structure. The concrete base needs repair, and we are seeking a contractor who can do the work.

The Historical Society entered into discussions with the City of Charlevoix to modify the 2011 contract for maintenance and restoration of the lighthouse to bring clarity to the roles and responsibilities of each party. As part of this, the Society's Lighthouse Committee will be reorganized and strengthened to provide oversight of the lighthouse.

Denise Fate, Lighthouse Chair

Programs and Events

In 2022 the Society continued a hybrid of in-person and online programs, which allowed us to reach an audience across the country during the off season.

Dave Miles was invited to present two programs on Zoom for North Central Michigan College in Petoskey's Lifelong Learning Club. In January, the topic was the coming of the railroad to Charlevoix in 1892 and in February, schooners and palatial yachts. These programs have resulted in widespread exposure and even new members.

On March 29th, Dave Miles did a Zoom program for the Society on his father, local commercial photographer Bob Miles from 1931 to 1972. All of our Zoom programs are recorded and uploaded to the Society's YouTube channel.

Trevor Dotson did a presentation tying into a book talk at the Charlevoix Public Library on April 12 on the historical realities of the 1913 copper strikes in Michigan's Keeweenaw Peninsula fictionalized in Mary Doria Russell's novel "The Women of Copper Country".

In-person programs at the Train Depot resumed on May 18 when David Miles presented an illustrated history of the Charlevoix Historical Society on the exact date of the 50th anniversary of its 1972 reorganization. The program covered in detail how it has grown and blossomed over 14 decades. An exhibit was also put on display at the depot over several months showing photographs and other memorabilia about the Society spanning this timeframe.

A Golden Jubilee fundraiser was held at the depot and Heritage Garden on June 16. Tickets were \$50, or \$143 for sponsorship level, in commemoration of the Society's existence dating to 1879. Over 100 guests were in attendance, including several past presidents of the Society. Entertainment from the past decades was provided by our very own Jessica Dominic. The event netted almost \$4000.

On June 9, the Charlevoix Cultural Corridor had activities to tie into the Downtown Summer Open House.

In December, our Holiday Dinner at Grey Gables was well attended as we welcomed the holiday season.

Denise Fate, Acting Chair



Finance Committee

The Charlevoix Historical Society was again financially successful in 2022. Net revenue exceeded \$27,750 after depreciation, and Balance Sheet assets increased in value to almost \$603,000, with only minimal liabilities. 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:

- Grants income totaled \$61,000, which was less than last year, but still very strong.
- Contributions were over \$38,000, which was over twice last year's total.
- Store sales remained strong at \$14,562.
- Special events and bus and walking tours generated almost \$20,000, which was much greater than last year.

Total bank account assets at year end totaled \$142,000, which was over 50% more than last year. Much of this, however, is income received for 2023 projects. The Society remains in a very 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 for 2022 was Linda Linklater. For quite a few years, Linda has always been eager to step forward and help out wherever needed, planning events, docenting at the museum or assembling the newsletter. We greatly appreciate her eagerness to share ideas and lend her talents to make our events and other activities successful!

Denise Fate, President

Embrace. Preserve. Cherish. Capital Campaign

During 2022, \$53,673 in contributions were received, including the grants awarded. Balances at year end totaled \$102,970 in the endowment fund, and \$124,844 available in non-endowed capital funds. There are a number of capital projects in queue for the next couple of years, for which funding has been received, or is being sought through grants or donations. An initiative was launched in the Fall for the purpose, with a goal of raising \$300,000. By the end of the year, just over \$23,000 had been received towards the initiative (included in the total stated previously).

Projects planned for 2023/24: I/T upgrades (\$29,000) to improve the security and performance of the computers systems, Collections Management System (cost TBD), a new roof, pergola and chimney restoration at the Train Depot (\$110,000) and a fire-resistant collections vault at the Museum at Harsha House for storage of the photo collection (cost TBD) and valuable artifacts.

Included in the capital funds are grants awarded by the Charlevoix County Community Foundation, Great Lakes Energy People Fund, and Rotary Club of Charlevoix. We are very grateful to all of these grantor organizations.

For the gifts received in 2022, we would like to express our sincere appreciation to all donors (listed below).

Denise Fate, Co-Chair

2022 Donors:

Lillian Arnold
Anonymous
Jennifer Harsha Carroll
John & Jeri Duerr
Phyllis Elzinga
Laura Everett
Gary & Denise Fate
Jon B. and Lisa Mower Gandelot
Bill and Pam Gnodtke
Ralph & Mary Lynn Heid
Paul & Sally Hoelderle
Larry & Gayle Levengood
Jeff and Alene Lipshaw
Linda & Richard Mueller
Keith Podob
David & Joan Robinson
Julia Taylor
Jerry Willis



EMBRACE. PRESERVE. CHERISH.

Members of the Charlevoix Historical Society, 2022

(Memberships Received by October 28, 2022)

Diamond Patron (\$3,000+)

Ole Lyngklip III

Platinum Patron (\$2000 - \$2999)

Adrienne Osborne Ives*, Robert & Marissa Kagle*, Craig & Deborah Mann,
Paul & Linda Weston

Gold Patron (\$1000 - \$1999)

Mike & Rhea Dow*, Paul & Sally Hoelderle,
Lynne & Mason Rosenthal, Jonathan & Katherine Weber

Silver Patron (\$500 - \$999)

Ace Hardware, Belvedere Club, Deborah Buchanan, Patrick & Beth Camilleri, Vincent &
Mary Ann Chew, Charlevoix Commercial Center, Charlevoix State Bank, Richard
Donaldson, Jr., Brian Dooner, Phyllis Elzinga, Gary & Denise Fate*, Rochelle & Randolph
Forester*, Ralph & Mary Lynn Heid*, Kay & Don Heise, Dale & Diane Herder, Tina Heugh,
Rich & Perry Irish Hodgson, Tom & Sue Kirkpatrick, Katherine Liggett, Nu-Core, Inc.,
Edward O'Neill & Susan Kroll, Richard & Diane Platt, Susan Van Wieren,
David & Judith Wilson

Bronze Patron (\$350 — \$499)

Lawrence & Danielle Allan, Tom & Maryalice Armstrong, Cindi Ann Baird,
Jennifer Belanger, Stephen & Marsha Braun, Connie Cunningham, John & Jeri Duerr*,
Stefany Freeman, Robert & Jan Grupp, David & Darlene Hein, Bill & Dottie Holmes,
Ken & Nancy Kline, Denise Leduc, Michael Lindley, Joseph & Nancy Malloure,
Amanda Stolcenburg, Don & Vicki Voisin*

Ralph Hamilton Circle

Marcia Baird, Charles Bingham, Jennifer & Stan Carroll*, Roger and Sheila Christensen,
Chuck & Nancy Cleland, Beth & Christopher Cowie, James & Lori Dane, Tom Darnton,
Dick & Jan Dilley, Gerard and Alicia Doan, Teddis & Marilyn Dumbauld, Lynn & Janice
Evans, Mike & Kim Foster, Joanne Friedman, Bill & Pamela Gnodtke, Ellen Goldstick,
Steve & Sue Goslee, Bruce & Joyce Herbert, Sandy & Michael Hermanoff, Carol & Jon
Hisey, Michael Hurchick, Kristin Jones, Jocelyn Laurent, Kathie and Steve Libert, Kip &
Linda Linklater, David Miles, Richard & Linda Mueller*, Marilyn Novak, Gretchen Olsen,
Marita & Angelo Parrish, Steve & Kathleen Paterka, Keith & Laura Podob, Ken & Shirley
Polakowski, Jeffrey & Nancy Porter, Bill & Sandra Powel, Joy Ann & James Price*, Connie
& Jerry Rogers, Robert Schrock, Danna & Wade Segrest, Dr. & Mrs. Jerome Sitner, Mark &
Valerie Snyder, Beth Strawbridge, John & Anne Teesdale, Tom Toomey, Rebecca Beattie
& Murphy Watts, Ronald & Carolyn Weislik, Wiemer Family, David Williams

Family

Sherle Abramson-Bluhm, Ruth Augustine, Bill & Anna Austin, Rick & Jean Belvin, Sue Bolt, Richard Brandi & Maureen Radke, Jeff Brown, Randall & Sharon Bytwerk, Bill & Judy Carey, Pat & Mike Carland, Joe & Julie Carmody, Rusty & Pam Carpenter, Eugene & Nan Ruth Chardoul, Dave & Julie Christiansen, Mike & Eileen Chrzanowski, Sarah Cohen, Geoffrey & Lynn Coleman, Katherine Craig, Dean & Joyce Davenport, Gail DeMeyere, Richard & Connie Dexter, David E. & Elizabeth Domann, Charles & Jane Duerr, Dan Edson, Clint & Audrey Etienne, Virginia Finney-Lahde, Lawrence Freedman, Jonathan & Lynn Friendly, Peggy & David Gallinat, Dennis Halverson, Louis & Meryl Hankey, Charles & Nancy Harpham, Gordon & Sharon Hassing, Janie and Ervin Hire, Andrew & Stephanie Hittle, J.B. Hoyt, Anne Kelly, David Kirkpatrick, Tammy Legenza, Karl & Deborah Lewis, Jeff & Alene Lipshaw, Edward May III, Abbott McCartney, Robert & Kimberly Molter*, Loren Musilek, Robert Niemi, Paul & Joan Nowak, Meredith Patton, Leandra Peak, Laurie Pterneas, Geoffrey Reynolds, James & Jo Ellen Rudolph, Don & Judith Schneider, Larry & Dorothea Smith, W.C. & Linda Smith, Bill & Betsy Stewart, Jim & Elise Straus, Donald Swank, John & Anne Teesdale, Susan Tukul and Michael Balloch, Kathryn and Douglas Vance, Joel & Nancy VanRoekel, Joseph & Christie Vogelheim, R.J. Waddell, Jan Wilds, Dr. Aaron & Amanda Wilkin, Joseph & Beatrice Wollam, John & Anna Young

Individual

Barbara Adams, David & Lillian Arnold, Susan Barnett, Joseph Beaudoin, John & Debbie Belfy, Renae Bennett, Marcia Besonen, Shelley Boehmer, John Bradbury, Susan Brochu-Hoshield, William & Gloria Broder, Varina Buntin, Judy E. Bunton, Aimee Cooper, Thomas Cooper, Emily Crook, David Cutler, Ryan Deery, Billie D'Entremont, Bill & Karen Dotson, Renee Durbin, Beverly Eby, Charles Ervin III, Jon & Sally Fogg, Carolyn Fowler, David & Nancy Fowler, Linda Campbell Foy, Roberta & Peter Gluck, Gretchen Grenell, Hugh Hansen, Linda Harvey, Bob & Margaret Heath, Jon Hess, Tina Heugh, Mark Hosmer, H. Daniel Jones III, Knights of Columbus - Fr. Pierre Charlevoix, Jackie Krutsch, Bill & Jill Kurzava, Amy Lalewicz, Jayne Larion, Kate Left, Larry Levengood, Jim Lewis, Lois Lewis, Steve & Barb Little, Ian Lyngklip, Vera McKown, Michele Miros, Georganna Monk, Jeannie Morrow, Benjamin & Jennifer Muladore, Brian & Andrea Novak, Jan Olach, Mary Palmer, Charles Paterka, John Porter, Elizabeth Postmus, Judith Primak, Ann Puffpaff, Jordan & Rhoda Raider, James Reamsnyder, Davonne Rogers, Steven Seely, Jo-Ann Seitzinger*, Will Shapton, Beth Shields, W.C. Smith, John Soderman, Paul Stephan, Kate Stewart, Wayne Sundberg, Sally Suomela, Richard and Mary Ann Throop, Janet Williams

*Also a Life Member

Life Members

Mary Adams, James & Patricia Aikin, Rebecca Allard, Julia Anne Bandfield, Patty Beck, Michael & Mona Bergeon, Thomas Bickersteth, Walter & Lynn Bleakney, 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, Virginia Ewing, Sidney & Beth Feldman, Francis Flanders, Dr. Reed & Janet Freidinger, David & Cynthia Garland, Lynn Groves, John Haggard, Murray Hanna, Dr. Steve Hansen, Nancy Harrison, Ann Herzog Harsha, Hugh Harsha, Paul Harsha, Michael & Christine Heroy, Thomas & Diane Hess, Lou Hirschman, Laurie Lesser Hodgson, Elizabeth Hoffmann, Tim & Wendy Ives, Robert J. & Zeze Jess, Dr. Dennis & Karen Joy, Kohler Family, Frank Korotney, M.D.,

Life Members (Cont'd)

Ken & Carol Kranz, Ellen Lange, Gary Leitner, Melvin Lester, Lexalite Corporation, Susan Logie, Ole Lyngklip Jr., Dr. Melissa Makowski, Tad Malpass, Thomas & Martha May, Jill McCabe, Helen Merrill, Patricia Misrach, Sandra Moers, Glenn & Valerie Mueller, Marianne Mundy, Shirley Newman, Joseph Paradis III, Sally Phelps, Donna Phillips, John & Jill Picha, Karen Pierce, Dr. Roger Postmus, Kitty Rammacher, Patricia Ranger, Douglas Reynolds, Douglas W.P. Reynolds, Dave & Joan Robinson, Carl & Barbara Roehling, Lorene Sakamoto, Rudolph & Virginia Scharschmidt, William Schuiling, Lore Silberman, Glenn & Mary Snider, William Stevens, David Strawbridge, D.D.S., Kermit & Jenny Sutton, Joan Swanson, Mary Taylor, Robert Timms, Richard & Shirley Vance, William & Carol Venema, Village Graphics-Paul Casciani, Quintin Walker, Alan Weston, Sam & Cass Williamson, Gordon Wilson, John Wilson, Robert Winchester, Todd & Pam Wyett, Betty Zipp

Charlevoix Historical Society
Income Statement
January - December 2022

	Total
Revenue	
Total Grants Income	61,007
Total Contributions	38,182
Total Investment Income	-2,668
Total Membership Dues & Assessments	48,851
Total Misc Sales	954
Shop Sales	
Historical Soc. Sales	14,190
Light House Sales	371
Total Shop Sales	14,561
Total Museum Admissions	1,892
Total Depot Usage	4,800
Total Special Events Income	19,757
Total Revenue	<u>\$187,337</u>
Total Cost of Goods Sold	<u>7,349</u>
Gross Profit	179,988
Expenditures	
Total Museum Expenses	7,505
Total Membership Expenses	3,880
Total Depot Building Expenses	9,628
Lighthouse Expenses	496
Total Fundraiser & Special Event Expenses	6,725
Total Harsha House Building Expenses	8,895
Total Operations Expense	13,390
Total Historical Society Payroll Account	71,639
Total Depreciation Expense	30,071
Total Expenditures	<u>\$152,229</u>
Net Revenue	<u>\$27,759</u>

Charlevoix Historical Society
Statement of Financial Position
As of December 31, 2022

	<u>Total</u>
ASSETS	
Current Assets	
Cash in Bank Accounts	142,303
Accounts Receivable	445
Other Current Assets	<u>35,760</u>
Total Current Assets	178,508
Fixed Assets	
Depot Building	395,354
Harsha House	418,931
Furniture and Equipment	60,618
Land - Operating	68,945
Signage	20,929
Accumulated Depreciation - Investment Assets	<u>-540,390</u>
Total Fixed Assets	424,387
TOTAL ASSETS	<u>\$602,895</u>
LIABILITIES AND EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
Sales Tax Payable	<u>168</u>
Total Liabilities	168
Equity	
Unrestricted Net Assets	574,969
Net Revenue	<u>27,758</u>
Total Equity	602,727
TOTAL LIABILITIES AND EQUITY	<u>\$602,895</u>

Near Term Society Goals (2023-2026)

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

Membership:

- Increase number of members to over 400
- Add new Ralph Hamilton and patron members each year
- Steadily increase dues income to \$50,000 or more
- More extensive communications to promote membership, including social media
- Solicit corporations for sponsorship or patronage
- Explore and implement CRM system for auto-renewal and sustaining memberships
- Engage students

Public Relations/Marketing:

- Enhance retail operation, focus on marketing of unique merchandise
- Social Media and Website: continuous improvement of content
- Continue support of bus and walking tours
- Widespread promotion for maritime exhibit

Programs and Events:

- As a matter of practice, integrate diversity, equity, inclusiveness into programming
- Engage youth in our activities whenever possible
- Plan creative and engaging fundraising events: 2023 Lighthouse 75th celebration
- Programs to complement the exhibit
- Partner with Cultural Corridor on engaging seasonal events

Buildings and Grounds:

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

Depot

- 2023/24: Exterior repairs and restoration - chimney, roof, gutters

Museum at Harsha House

- 2023: Relocation of offices
- 2024/25: Construct fire-resistant collections vault & replace membrane roof
- 2025/26: Replace/repair systems per engineering recommendations: boiler and plumbing;
- Relocate gift store to rear entrance when feasible
- Improve interior ramp for accessibility when feasible

Lighthouse

- 2023: Concrete base repair
- 2024: Minor interior paint & window maintenance

Museum Operations:

- 2023: I/T Upgrades, including server and network
- Collections Management:
 - Replace Collections Management System (2023/24)
 - Organize/Catalog/Inventory all photographs and artifacts in the collection in methodical fashion
 - Fund and purchase sufficient archival materials
- Secure funding and manpower for on-going needs to digitize and catalog the Society's large photographic collection
- 2024/25: Construct fire resistant storage vault for photograph collection
- Revisit policies for accessioning and deaccessioning artifacts, as well as photo policy
- Work with Charlevoix DDA as advocates of historic preservation, in particular for Charlevoix's historic buildings
- Continue evolving as the leading center for historic research in Charlevoix
- Nomination of Harsha House for the national register of historic places, working with DDA/SHPO once downtown historic district approved

Financial:

- Promote the *1892 Legacy Society*, for those who may be interested in considering the Historical Society in their estate planning
- 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 staff in functions of operation and develop for professional growth
- Board / Chair recruitment, including officer succession plan