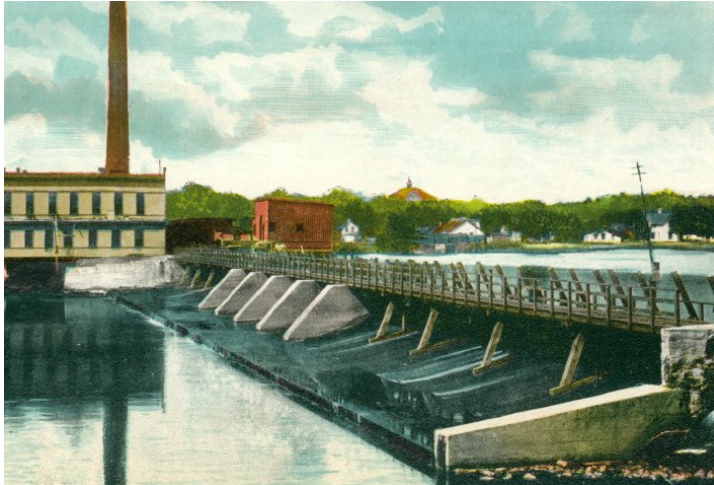




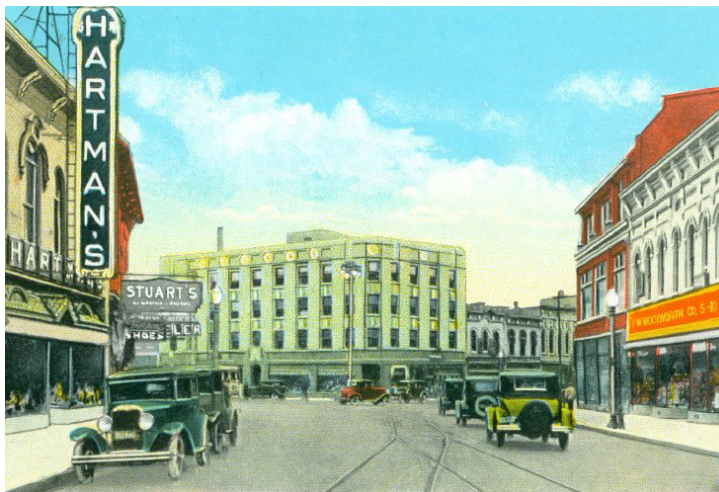
BELOIT
HISTORICAL
SOCIETY EST. 1910

STRATEGIC PLAN REPORT

2017-2019



BELOIT DAM POSTCARD



GRAND AVENUE, BELOIT POSTCARD



GRAND AVENUE, BELOIT POSTCARD

TABLE OF CONTENTS

- 2 **Executive Summary**
- 3 **Introduction**
- 4 **Core Ideology: our Mission, Vision and Values**
- 5 **Strategic Context**
 - Internal Assessment
 - External Assessment
 - Organizational Assessment
- 6 **Goals and Strategies**
- 7 Goal 1: Strong Leadership
- 9 Goal 2: Financial Sustainability
- 11 Goal 3: Collection Preservation
- 13 Goal 4: Positive Image
- 15 Goal 5: Effective Facilities

The strategic planning process was facilitated by Pam Clark Reidenbach of the Northern Illinois Center for Nonprofit Excellence at Rockford University.

Board of Directors

Teri Downing, President
 Nicolette Meister, Vice President
 Richard Gerhard, Treasurer
 Ellen Joyce, Secretary
 Diana Brooks
 Rick Dexter
 Jackie Jackson
 Tom Larsen

Staff

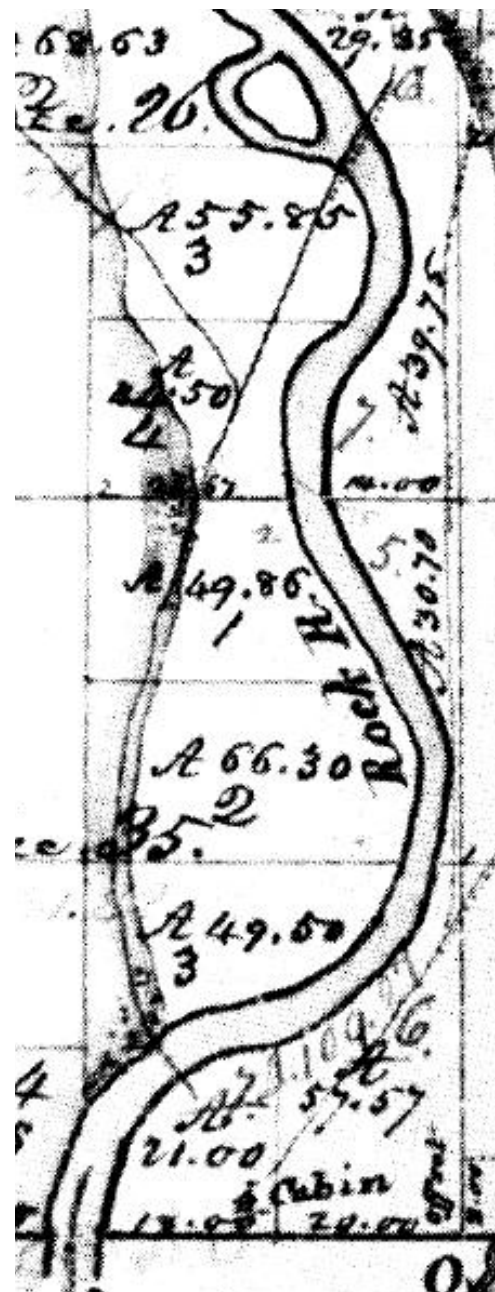
Donna Langford, Executive Director
 Kelly Washburn, Director of Programming
 Leanne Howland, Administrative Assistant
 Leith Rohr, Archivist

Revision 4, May 2020

On the Cover:
 Beloit Iron Works drafting office. In 2019, Beloit Historical Society catalogued documents and images related to Beloit Corp.

FORWARD TOGETHER

To guide the next stages of growth and to direct future efforts and resources we will kick-off strategic planning for 2020-2023 with a survey. The survey is an essential first step to helping the Beloit Historical Society determine priorities and secure consensus on our future direction. We are truly, all in this together.



EARLY MAP OF THE ROCK RIVER

¹ <https://visitbeloit.com/beloit-is-hip-historic/>

INTRODUCTION



Beloit Post Office



Upper Bridge (Portland Avenue)



Horace White Park

The Beloit Historical Society (BHS) has been going through an exciting and expansive stage of development guided by a comprehensive strategic plan. The plan was developed to align our collective vision and strategies around our mission of “*sharing Beloit’s history to enhance community pride.*” For three years, the plan was a guide toward positive change within the Beloit Historical Society and the community.

This Strategic Plan was developed from a professional assessment of our collection items and conservation processes, a professional assessment of the Lincoln Center facility, an internal situational analysis, and input and data collected through focus groups of over 50 stakeholders that included civic leaders, cultural groups, educators, and current and former volunteers and members. A Strategic Planning team comprised of staff and Board members drove the process with guidance of a facilitator, Pam Clark Reidenbach, from the Northern Illinois Center for Nonprofit Excellence at Rockford University.

5 GOALS

1. Strong Leadership
2. Financial Sustainability
3. Collection Preservation
4. Positive Image
5. Effective Facilities

Using the data collected through the strategic planning process, the team defined core values, revised the BHS mission, and created a plan of action for the future. Common themes and critical issues were identified and five goals were defined to drive the course of the BHS action over the next three years.

The Strategic Plan includes strategies, specific steps with target dates, accountability, and measurements for achievement.

Strategic Plan documents are available at beloithistoricalsociety.com/strategicplan.php

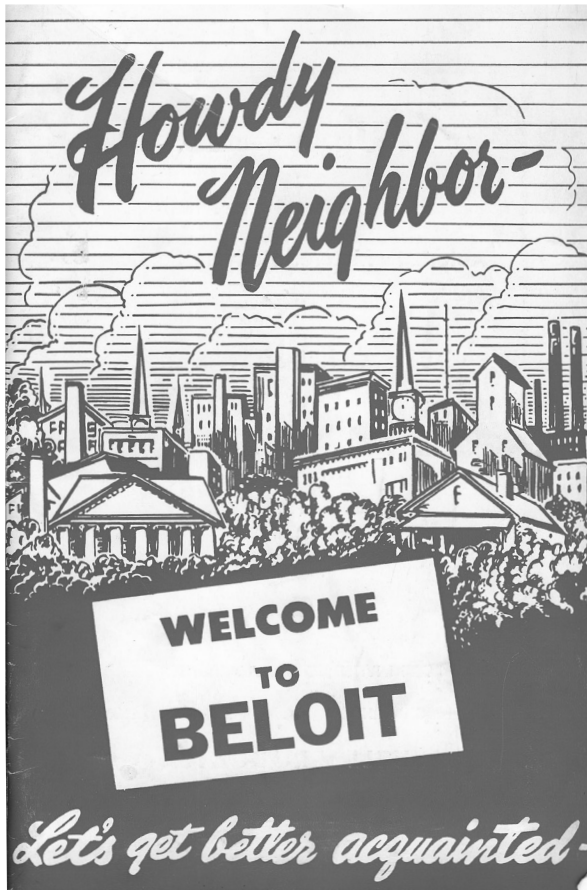
CORE IDEOLOGY: OUR MISSION, VISION AND VALUES

MISSION

Sharing Beloit's history to enhance community pride.

VISION

To make history the focal point of community pride and to serve as a constant reminder to the community of its great and diverse heritage.



1957 PUBLICATION DISTRIBUTED BY THE GREATER BELOIT ASSOCIATION OF COMMERCE TO NEW RESIDENTS

CORE VALUES

We believe...

- History strengthens **community pride**
- Local history is an **economic and cultural asset**
- Local history can **engage citizens**
- History can help us **address contemporary challenges**
- Shared history **builds a strong community**

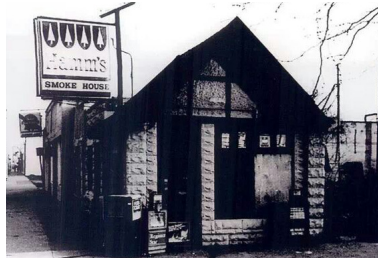
We are committed to...

- **Preserving** Greater Beloit history
- Sharing a respect for a **diverse history** to further develop our sense of community and enrich the lives of all our citizens
- Serving the public by providing **resources and education**
- Being **responsible stewards** of our community's historical resources
- Presenting an **inclusive and unbiased** view of the past

STRATEGIC CONTEXT



Pouring Dryer Head, Beloit Iron Works



Smoke House



Golf Game

INTERNAL ASSESSMENT

The Board of Directors and staff conducted an internal assessment, beginning with a SWOT Analysis (our strengths, weaknesses, opportunities and threats). The Board engaged a focus group of society volunteers and commissioned two professional studies to assess the condition of the BHS collection and the Lincoln Center facility.

Facility Condition Assessment

The assessment of the Lincoln Center facility was performed by local firms, Angus-Young Associates and R.H. Batterman and Co., Inc. Both structural and mechanical components of the facility were assessed. Priorities and recommendations included repairs to the parking lot, roofing, windows, doors, electrical, plumbing, HVAC, sanitary drainage, and water distribution systems. Estimated repairs over the next ten years total \$750,000.

Conservation Assessment

Sue Maltby, a professional conservator, conducted an assessment of the BHS collections, which analyzed the security, organization, preservation and storage of the items. Priorities and recommendations from the assessment included specific actions to be taken now, within a year, within two years and within 3-5 years.

Read the assessments at
beloithistoricalsociety.com/about.php

EXTERNAL ASSESSMENT

To gain insight into how the community perceives and envisions the Beloit Historical Society, the Society held three focus groups that included: Civic Leaders, Cultural Groups, and Educators.

Themes emerged that labeled the BHS as “invisible”, in disrepair, in a bad location, not advertised, lacking presence in the community, lacking collaboration, antiquated, and “dying”.

The groups also found important value in BHS’s historic items, enjoyed our events and activities and called us a “*hidden gem*”.

ORGANIZATIONAL ASSESSMENT

The Board and staff considered the findings, set five specific goals, then developed strategies and actions to take over the next three years.

The Strategic Plan was adopted by the Board of Directors in May 2017.

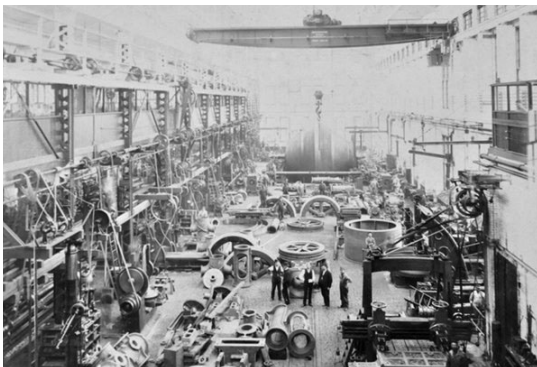
GOALS AND STRATEGIES



JOHN J. RUCH STORE, 318 GRAND AVENUE, 1904



RENDERING OF TEBO'S CABIN, SHIRLAND AVE. AND STATE ST.



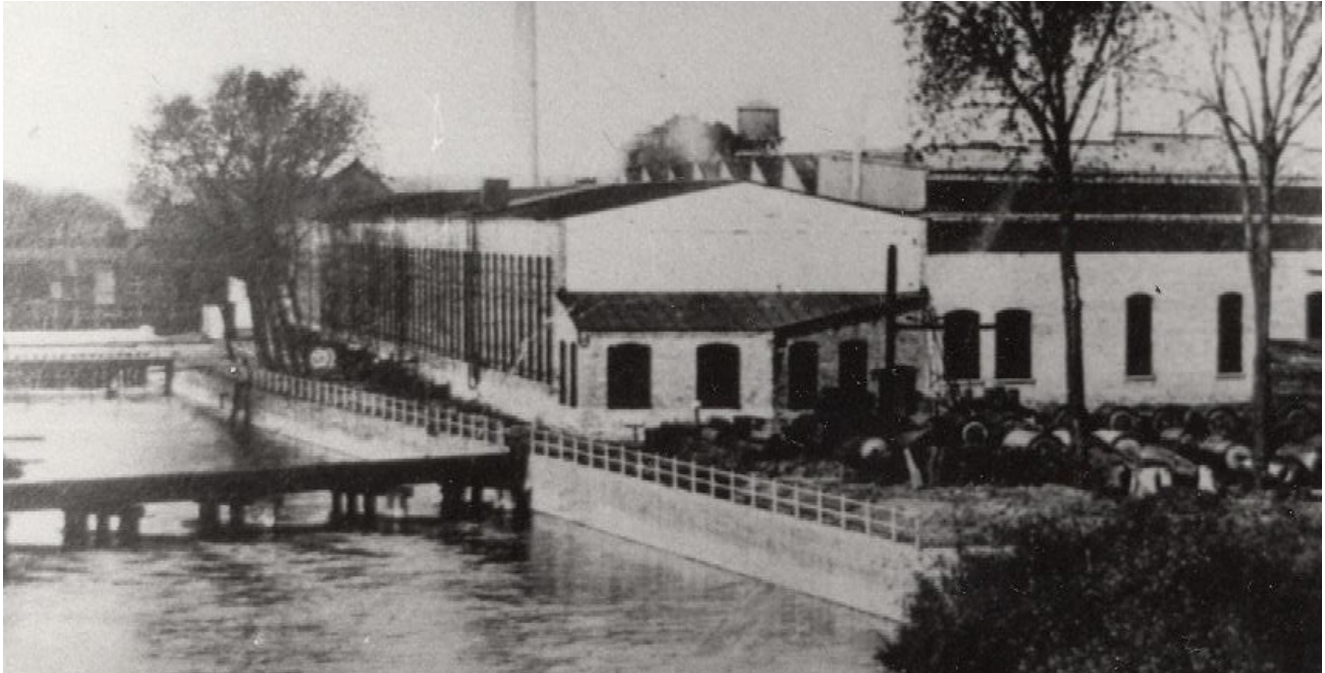
ON THE FLOOR BELOIT IRON WORKS. EARLY 20TH CENTURY

The Board of Directors defined five primary goals, then further defined high-level strategies to achieve those goals. Lastly, each strategy was broken into actions that were reasonable and attainable within a 3-year period.

The Board of Directors will:

1. Develop a strong leadership team to improve community involvement, programming and communication
2. Establish solid funding sources and financial practices to become financially sustainable
3. Improve the preservation of BHS collections and provide better interpretation to the community
4. Refresh BHS identity to better communicate and appeal to more audiences
5. Take a hard look at the condition of the Lincoln Center and Hanchett-Bartlett facilities to determine their long-term viability

Our Strategic Plan is intended to be a guide and resource. It is meant to aid the Board of Directors and staff in making decisions on the welfare and actions of the organization. It is a living document, in flux as our actions have effects.



Beloit Corp with Mill Race, 1914

ACHIEVEMENTS

- ✓ **Hire a Director of Development**
- ✓ **Recruit Board Members**
- ✓ **Increase transparency and professionalism**
- ✓ **Develop community partnerships**

GOAL I: LEADERSHIP

Beloit Historical Society is lead by a small volunteer Board of Directors and managed by two part-time staff members. Just prior to starting the strategic planning process, the BHS lost its Executive Director and several board members, entering a period of limited public accessibility.

It was a top priority to get the necessary staff in place to keep our doors open; instead of one full-time Executive Director, two part-time Director positions were created. A Director of Programming, to ensure we continue to engage the community and share Beloit's history, and a Director of Development, to help achieve financial sustainability and lead the BHS in development planning. In October 2019 the BHS was able to hire a full-time Executive Director. The Executive Director assumed the responsibilities of the Development Director and supervises BHS staff.

The BHS Executive Committee has also begun networking with community leaders to identify potential board members, advisors and volunteers. We have grown our board of directors with diverse talent.

To increase accountability and transparency, processes around board resolutions have been implemented. We continue to build upon our policies, public documentation and communication.

ENDOWING OUR FUTURE

In the late Fall of 2018, we received notification that the Beloit Historical Society was the sole beneficiary of a Trust established by Nancy K. Soeurt, a deceased BHS member and supporter. The Board established an ad hoc committee of Board members, staff, and former board members to determine what to do with the assets of this trust. The Trust placed no restrictions on our use of these funds.

After several months of meetings this committee recommended the following:

- Our bylaws wisely require us to place otherwise unrestricted bequests in endowments which will produce permanent income for the Society;
- That the annual draw from this endowment be used solely to support the salary of an Executive Director, and;
- That the funds be invested with the lowest possible fees.

These recommendations were adopted by the board and upon receipt of the assets of the Trust in mid-2019, we began investing these funds in a Vanguard Non-Profit account.



Albert Wirz (Titanic sinking victim) Pocket Watch



Mary Lincoln Quilt Square



Beloit Sesquicentennial Quilt



Watercolor painting of Beloit Iron Works at Christmas by Laura J.A. Neese

Non-profits Unite

During our efforts to learn more about ourselves, we learned more about our fellow non-profits and community organizations. We are not alone in the obstacles we face.

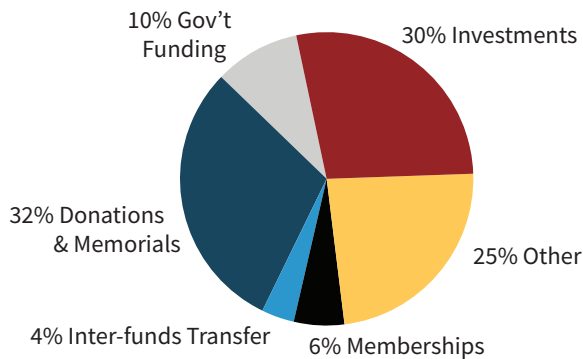
The focus groups brought us in contact with organizations willing to partner and community members with ideas to inspire us.

The BHS has partnered with The Angel Museum, Beloit College, and Visit Beloit. Through our board member, Nicolette Meister, we had the opportunity to co-sponsor the 2017 Stateline Small Museums Conference with Beloit College and Stephenson County Historical Society Museum.

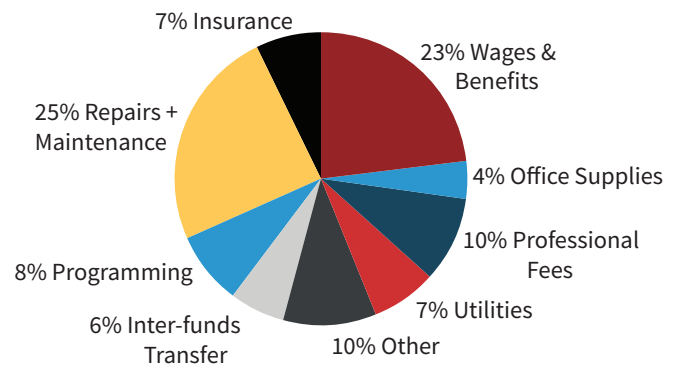
We have also strengthened our relationship with the Rock County Historical Society, the City of Beloit and the Beloit Public Library.

2019 Revenue

\$213,679

**2019 Expenses**

\$160,109

**ACHIEVEMENTS**

- ✓ **Develop a Fundraising Plan**
- ✓ **Pursue Grants**
- ✓ **Increase Membership**
- ✓ **Develop a Planned Giving Program**
- ✓ **Expand Corporate partnerships and sponsorships**

GOAL 2: SUSTAINABILITY

For over 100 years, the Beloit Historical Society has worked to preserve Beloit's legacy; we hope it's here for over 100 more.

The task of the Finance Committee is to manage and grow the Society's endowment, increase membership revenues, and increase donations.

A part-time Director of Development position was created to guide the Society in achieving our sustainability goals. This included our corporate sponsorship program and creation of our Development Advisory Committee. Tim McKearn filled this position for a few months before becoming the Foundation Director at Blackhawk Technical College. We are grateful for the wisdom Tim imparted and tremendous work he contributed toward our sustainability goals.

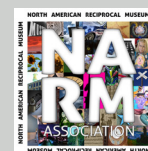
In 2017, we had an audit completed for the year ending December 31, 2016. No problems or deficiencies were found.

In 2018, we established a Reserve Fund of six months of operating expenses to further solidify our financial foundation.

In 2019, we successfully passed a full audit for calendar year 2018 with no deficiencies noted. This year also saw the receipt and investment of the funds from the Nancy K. Soeurt Trust. (See page 8)

Awarded GuideStar Seal of Transparency Year after Year

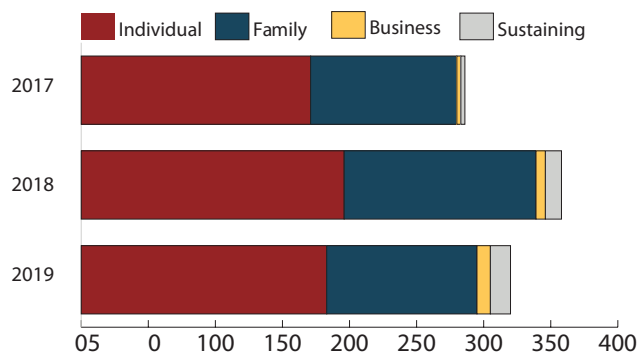
We are proud to display the GuideStar Gold seal. A high GuideStar rating is favorable when seeking grants and other funding. Moving from Silver to Gold was an important step toward our goal to increase revenue through outside funding sources and grants. Maintaining a good financial reputation is a pillar of our plan for financial stability.

**Thank you, Sustaining Members!**

Sustaining members get all the same benefits as a typical BHS membership, but they also receive a North American Reciprocal Museum (NARM) Association membership. Their NARM card provides access for free or with membership rights to over 1,000 other museums.



Aerial View of Beloit's City Center, circa 1955



Memberships

A primary goal of this plan was to increase our memberships. Our members are our primary way to achieve our mission as well as our primary way of support. Revenue from memberships helps sustain us.

A successful promotion to give the gift of membership in 2018 resulted in a welcome increase; the decrease in 2019 reflects a number of those memberships expiring. Sustaining memberships, a new level of support, continue to increase each year.

Beloit Historical Society member benefits include discounts to BHS events and research services, free use of the Luebke Library, and a subscription to Confluence, the BHS newsletter highlighting Beloit history. Learn more at beloithistory.org.

SPONSORSHIPS + GRANTS



In 2019, R.H. Batterman & Co., Inc. became our first Gold level Sponsor. Their sponsorship contributed to over 6 events and our newsletter.

Ecolab has been a generous benefactor to the BHS. First with a grant to purchase a large-format scanner to further our collections work. Then by sending a crew of volunteers for a work day at the Lincoln Center. Finally, their \$5,000 grant to replace our office lighting.



FritoLay sent a crew of volunteers to the Lincoln Center for a work day painting.

Event Sponsors:



Carroll Allstate
Insurance Agency



Noon Kiwanis Club

Franks Distributing





Museum Studies interns, Drew Agnew and AmySue Greiff, spent the summer upgrading the Military Room

ACHIEVEMENTS

- ☒ **Implement Assessment Recommendations**
- ☐ **Develop an Interpretive Plan for the Future**
- ☐ **Secure Funding for Interpretive Plan**
- ☐ **Hire a Curator/ Collections Manager**

Read the Conservation Assessment and Policies on beloithistoricalsociety.com.

GOAL 3: COLLECTIONS

During the 2017-2019 Strategic Plan, collection stewardship efforts focused on implementing recommendations from the conservation assessment completed in May 2016. A Preservation Plan based on the assessment charted a course for incremental improvements to collections care, management, and access. The Beloit Historical Society's Collections Committee, volunteers, employees, and interns made many improvements, as evident by the following accomplishments.

- Eight Beloit College interns contributed to the completion of inventories of the textile, military collection, toy, and sports collections and volunteer Carol Mankiewicz completed an inventory of the Luebke Family Memorial Library.
- A mighty crew of dedicated collection volunteers under the leadership of Diana Brooks cataloged backlogged accessions and streamlined cataloging methods.
- The Collections Committee met monthly and accomplished the following:
 - Substantially reduced the accession backlog.
 - Developed a Collections Access Policy. (approved by the Board 10/20/16)
 - Developed a Statement on Direct Care of Collections. (approved by the Board 10/20/16)
 - Developed a Collections Management Policy. (approved by the Board 2/15/18)
- Beloit College Museum Studies students completed three service projects focused on collection upgrade projects.
- Funding from the Neese Family Foundation and Colonel Robert H. Morse Foundation was secured to hire project archivist, Leith Rohr, to inventory BHS archives.

- Rehoused the entire archive collection in archival quality storage boxes.
- Removed photographs from the mezzanine and rehoused in archival quality storage boxes.
- Increased security by installing locking doors to the Arthur Missner Veterans Gallery and Memorial and to manuscript storage in the Luebke Family Memorial Library.
- Increased storage capacity in the manuscript storage room by installing a new shelving unit.
- Deaccession and disposal of toys and original newspapers in very poor condition that were previously microfilmed.
- Installation of five storage cabinets donated from the Beloit College Libraries.
- Scanning of photographs and postcards and upload of images PastPerfect software.

Our Collections

The Beloit Historical Society collects items that relate to the history of the greater Beloit area. Our collections include items that were created in Beloit, reflect the history of Beloit's diverse residents over time, or have a direct and important connection to an event in Beloit history or a prominent Beloit. BHS curates two types of collections: permanent and education.

The permanent collections are objects with the highest interpretive and historical value. We plan to preserve these items indefinitely and with the highest standards of care and processing. Permanent collections include the artifact, photograph, and manuscript collections.

Education collections are objects acquired for educational programs, exhibits, and public access. Education collections are replaceable and are curated to lower standards of care and processing. Education collections include the library, reference, and hands-on collections.

Acquisitions should support the mission of the BHS — sharing Beloit's history to enhance community pride —and be of significant historical value to Beloit.



Museum Studies interns Julia Schoenthal and Katelynn Sinclair rehoused the toy collection in archival boxes (left, before and after) and proposed select toys for deaccession (right)



Collections Volunteers



Beloit College Museum Studies students conduct a Saturday work day



New Brand Identity

Our focus groups revealed themes that illuminated community perceptions. People saw us as stagnant, inaccessible, in financial difficulty and becoming irrelevant.

We don't see ourselves this way and made it a goal to do better to communicate who we are and what we do.



The Beloit Historical Society is an engaging, welcoming organization that fosters pride and support in the community with relevant, memorable exhibits and programs.

ACHIEVEMENTS

- ✓ **Define our Brand Identity**
- ✓ **Adopt our new Brand**
- ✓ **Enforce brand policies**

GOAL 4: POSITIVE IMAGE

We established a Branding Committee to develop a brand identity that reflects the organization we are and want to be.

The committee was tasked with designing a new logo, developing an organizational style guide and brand policies. They were adopted in October 2018.

The committee will also coordinate the adoption of the brand, working to design and replace our business documents, signs, and online appearance.

The next steps are to establish a marketing committee to oversee our brand, enforce use of the brand guidelines, and complete the transition to the new look.

Seeking Funding for a New Sign

We intend to seek municipal approval and grant funding to renovate our Lincoln Center sign. New logo panels, a bit of effort and a fresh coat of paint will give our current sign a brand make-over.



Inspired By Our Roots

The flag was designed by Professor Theodore Lyman Wright in 1916 for the Beloit City Pageant. Its symbolism is described by its creator in the pageant story:

The blue band is the Rock River which flows through Beloit. In the center of the banner the band of blue widens in a complete circle, symbolic of the dammed millpond around which the city's earliest industry developed. In the center of the circle, in red, is the flaming wheel, representing the spoke, flange and vane of a turbine. The turbine bears a resemblance to a turtle, suggesting the Indian past, when the site at the confluence of Turtle Creek and the Rock River was called Turtle Village.

We wanted our logo to reflect our mission; our dedication to the Beloit community and our belief that our history is relevant to our community now and in the future.

Our new logo reflects that in our use of elements and colors from our city flag and its modern typography. The symbolism of the emblem carries forward and with every impression of the logo, we share a bit of our own history.



SHARING BELOIT'S HISTORY

The Beloit Historical Society's reputation for being a relevant organization that fulfills its mission and raises our community pride isn't achieved through branding, but through our community events and programming. While our facilities are undergoing review and renovation, our outreach events are the primary way we reach our constituents.

Thanks to the continuous efforts of staff member Kelly Washburn and volunteer John Sabaka, the BHS has taken exhibits on the road to community rooms, schools and assisted living centers. We've hosted events that shine a spotlight on our diverse roots, events that introduce history to children in a creative way, events that are a collaboration with other local groups to benefit us both, and events just for good, old fashioned fun.



Putting Down Roots: New Home to Hispanic Immigrants



Permanent Exhibit at the Lincoln Center



Traveling Exhibit



Putting Down Roots: Beloit's First People



Putting Down Roots: The Great Migration
(Photo by Edmond Apaloo)



Open House and Book Signing



Lincoln Center



Hanchett-Bartlett

STRATEGIES IN PROGRESS

- ☒ **Assess current facilities**
- ☐ **Define Needs for a new Facility**
- ☐ **Establish a Committee**
- ☐ **Secure Funding for planning phase**

Find the assessments at
[beloithistoricalsociety.com/
about.php](http://beloithistoricalsociety.com/about.php)

GOAL 5: EFFECTIVE FACILITIES

The Beloit Historical Society currently oversees two facilities - Hanchett-Bartlett Homestead and Lincoln Center. Additionally, both properties have large tracts of adjacent land also under the management of the BHS.

The Beloit Historical Society contracted property condition assessments of both facilities to ascertain the condition of the existing buildings and to have a better understanding of the current and future repair needs for building components and systems. In July 2016 an assessment of the Lincoln Center was completed by local firms Angus-Young Associates and R.H. Batterman and Co., Inc., and revealed over \$475,000 in immediate and short term repairs and over \$264,000 in deferred repair costs. In May 2019 an assessment of the Hanchett-Bartlett Homestead was completed by Angus-Young Associates and revealed \$199,374 in immediate repairs and \$138,525 in deferred repair costs.

We have learned through focus groups that the BHS is perceived to be inaccessible and poorly located. To address these issues, we set a goal to evaluate our space needs, the feasibility of maintaining the facilities we currently manage and our opportunities in the community.

Our Physical Journey

From 1910-1954 the Beloit Historical Society occupied the second floor of the Beloit Carnegie Library on West Grand Avenue. In 1954 the Beloit Historical Society moved across the street into the Municipal Center where it occupied the third floor for 14 years. In 1968, the BHS moved into the Hanchett-Bartlett Homestead. In 1990, BHS moved into the recently renovated Lincoln Center, formerly Lincoln Junior High School (1921-1985).

The Lincoln Center is currently the administrative center of the society and houses collections, exhibition and public event spaces, the Luebke Family Library, and the Elliott-Perring Sports Hall of Fame.

FOCUSING ON CURRENT NEEDS

We knew at the onset of this plan that we would need to be responsive and flexible; that things would change. We also knew our goals were ambitious and that some goals were more likely to be realized in the long-term. But some goals could not wait.

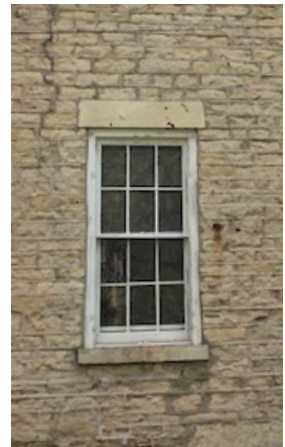
Addressing the immediate needs of the Lincoln Center and Hanchett-Bartlett roofs became priorities. The Lincoln Center roof has been patched, but continues to leak with heavy rainfall, but Hanchett-Bartlett received a new roof. After receiving a Certificate of Appropriateness from the City of Beloit to undertake this work, Aurum Contracting removed and replaced all old roofing material, added much needed ventilation in the attic, and installed new copper flashing.



Work being done on the roof at Hanchett-Bartlett



Day of Caring: Painting the Lincoln Center



Hanchett-Bartlett window

