

Cleveland Restoration Society

2014-2017

Strategic Work Plan



Photo by Eric Benson Photography

Every year, CRS holds the Celebration of Preservation in collaboration with the Cleveland chapter of the American Institute of Architects. This event honors the best historic preservation achievements in Northeast Ohio in the past year and the individuals, businesses, and organizations that make them happen. The setting for the 2013 Celebration of Preservation was the rehabilitated Allen Theatre, in Cleveland's historic PlayhouseSquare.

mission

The Cleveland Restoration Society uses the powerful tool of historic preservation to revitalize our diverse communities, strengthen the regional economy, and enhance the quality of life in northeastern Ohio.

vision

Our dream for ourselves and our children is that northeastern Ohio reclaims its vitality and prosperity and adds to its beauty through the preservation of its remarkable architectural heritage.

strategies

Through productive partnerships and creative alliances with community leaders, and with attention to the creation of economically viable solutions, we focus on:

- Leveraging Cleveland's Legacy City heritage to create vibrant, high-value neighborhoods
- Advocating for endangered landmarks and particular building types; supporting public policies that encourage their preservation
- Celebrating and communicating the positive role of preservation
- Ensuring the mission of historic preservation in Cleveland by deepening CRS's organizational capacity

Leverage Cleveland's Legacy City heritage to create vibrant, high-value neighborhoods

Goal: Continue to strengthen Heritage Home ProgramSM

- Increase cities participating in the Heritage Home ProgramSM by ten per year or expand the Heritage Home ProgramSM to all of Cuyahoga County, through County government or otherwise.
- Fulfill our contract with the Lucas County Land Bank, enabling it to operate the Heritage Home ProgramSM in Lucas County and making partnership with Lucas County successful.
- Utilize the Lucas County model to structure partnerships with Land Banks in Summit and other counties, thereby expanding the Heritage Home ProgramSM further into the state.
- Secure lending institutions in Geauga and Richland Counties. Secure lending institutions in other counties that join the Heritage Home ProgramSM.
- Build a mobile-friendly Heritage Home ProgramSM website.
- Successfully update the Heritage Home ProgramSM database to increase functionality and expand reporting abilities.
- Review construction specifications and loan escrow documents of the Heritage Home ProgramSM and update as needed.
- Expand Heritage Home ProgramSM staff to keep up with momentum; add Heritage Intern or Assistant or Specialist and expand time available from Construction Specialists.

The professional staff of the Heritage Home ProgramSM can offer advice with any home improvement project, from basic maintenance needs to specialized construction. More than 6,700 homeowners in Northeast Ohio have received free technical assistance through the program since it began in 1992.

Goal: Bring CRS's Preservation Services to neighborhood revitalization efforts

- Continue using the Ohio housing receivership statute to address vacant and blighted properties which negatively affect otherwise stable residential markets.



Photo by Colin Compton



Photo courtesy of Cleveland Restoration Society

- Focus on one property (2834 Courtland Boulevard in Shaker Heights) to test the statute in inner-ring suburban locations which fall under the purview of Common Pleas Court. If appointed Receiver, complete the scope to the Court's satisfaction.
- Partner with members of Cleveland City Council to bring the historic preservation message to new areas. In Ward 1, leverage the value of the post WW II housing stock to communicate African American heritage (Arthur Bussey subdivision) and encourage housing rehab.

The low-interest loan and specialized technical assistance available through CRS's Heritage Home ProgramSM enabled the eye-catching exterior transformation of this commanding Cleveland Heights neoclassical style home. Since 1992, CRS has facilitated \$41 million in neighborhood revitalization through this award-winning program.



Photo by Mary Ogilvie

- In Ward 10, conduct a survey to identify potential Cleveland landmarks and historic districts. Work with the Councilman to obtain local landmark designation.
- Complete survey and preservation consulting work for two Cleveland City Council representatives and identify services that can be offered to others.
- Complete pilot consultation with Thriving Communities Institute for Buckeye-Shaker, Woodhill and Mt. Pleasant neighborhoods and collaborate for similar services in other parts of the City of Cleveland.

Goal: Facilitate the use of the historic tax credits for small commercial properties by developing a local Small Deals program

- Structure and complete a beta test of the small deals committee recommendations utilizing the templates for deal documents developed by the small deals task force.
- Structure a template to provide construction specifications for Part 2 of the Federal Tax Credit application for small commercial projects.

- Explore the development of a commercial loan fund utilizing linked deposits for small commercial rehab projects.
- Create a pool of investment dollars for investors to invest in tax credits generated by small commercial deals or tap into an existing pool of investment dollars.
- Structure a full small deals program at CRS.



As an enhancement to our work in traditional neighborhoods, CRS has launched an initiative to support the rehabilitation of small-scale commercial buildings like this one. The fundamental concept is to bring the federal and state tax credits available for historic rehabilitation to small projects, when routinely these credits are not used for projects under \$3 million because of the complexity of using credits. CRS is bringing together the deep bench of expert practitioners in Cleveland to assist with this effort.

Advocate for endangered landmarks and particular building types; support public policies that encourage their preservation

Goal: Be the reasoned voice for endangered landmarks in Cleveland

- Continue to attend and be active in the meetings of the Cleveland Landmarks Commission to encourage designation and discourage demolitions. Always try to get ahead of the curve – to advocate before the landmark is threatened.
- Communicate the preservation message through social media and other actions when significant landmarks are threatened. Always frame the message in a professional manner to demonstrate CRS’s expertise and the value of preservation.
- Interact with City leaders, the Cleveland Landmarks Commission and other community organizations to positively impact preservation and development outcomes.



Photo courtesy of Cleveland Restoration Society

The concluding session of the conference “Historic Preservation in America’s Legacy Cities” was a workshop that focused on creating an action agenda for the future, building upon the educational sessions of the previous two days. The results of this afternoon of roundtable discussions are action-oriented and reflect a common understanding of the challenges and opportunities associated with historic preservation in legacy cities.

Goal: Participate in federal/state policy and lead in regional legacy city advocacy

- Monitor the federal historic tax credit during tax code reform. Participate fully on a national level to protect this essential incentive.
- Continue to support the Ohio historic tax credit.
- Follow up to the Legacy Cities Conference in meaningful ways. CRS’s position has been established now through the national conference, convened in Cleveland in June 2014.
- Ensure best results for the “way forward” agenda, final report.
- Mentor our Michigan state partners to host the second national legacy cities conference in 2015. Actively serve on the conference organizing committee.
- Take a leadership role in implementing the priority action items, in particular the need for funding from national sources.

Goal: Provide historic property advice and services to stewards of Cleveland’s landmarks

- Continue to offer free and fee-for-service consulting to individuals, organizations, and municipalities.
- Complete next round of steeple lighting projects and determine if further resources can be illuminated or if funding can be secured to help sustain those landmarks already illuminated. Create a plan to memorialize the project.
- Continue the work of the Sacred Landmarks Task Force and provide services and assistance to the stewards of sacred landmarks.



Photo by Kerrl Broome

CRS regularly offers tours and workshops for its members. These free or low-cost events allow access behind-the-scenes to some of Northeast Ohio's architectural gems, rehabbed or not. In 2013, CRS offered a Mother's Day tour of sacred landmarks, which included St. James in Lakewood. This church had recently been reopened after being closed by the Catholic Diocese of Cleveland. The tour also included a stop at the Museum of Divine Statues, housed in the former St. Hedwig Church of Lakewood.

Celebrate and communicate the positive role of preservation

Goal: Host relevant public programs to deepen appreciation of heritage

- Continue the tradition of CRS's three signature programs, the Community Luncheon, the Celebration of Preservation award program, and the Benefit, which is traditionally held at a historic venue.
- Strengthen the front-end organization of these signature events by working to establish dates and venues six to twelve months in advance, and by improving collaborative staff involvement.
- Strengthen the front-end announcement and initial promotion of signature events by completing communication web, print and press communications at least eight weeks in advance.
- Create a standard to follow up with attendees to signature events that expresses appreciation and an invitation to become further engaged, ideally through membership. This includes donor letters, membership solicitation, and email communication.

Goal: Host smaller programs that spotlight current preservation trends and issues

- Prioritize in-the-field programs such as tours to enable experiential learning.
- Raise the level of discussion on advocacy issues through forum and panels featuring specialized professionals with expertise to share.
- Current issues may include survey work, adaptive use, neighborhood revitalization, historic schools and sacred landmarks.

- A high standard of front-end and follow-up remains important for smaller events.
- Smaller events tied to current issues shall be calendared and communicated ideally 60 days in advance.
- Follow-up activity will be structured to increase membership and provide evaluation to increased event effectiveness and engagement.

Goal: Increase communication of CRS's selected preservation messages to community leaders, thought leaders and academics, residents of Northeast Ohio, and CRS's direct constituents and clients through email bulletins, *Façade* magazine, social media and printed materials, as appropriate

- Organize protocols and an organizational plan for email commu-

nication. These messages are to be honed and impactful.

- Email bulletins to promote events and programs or inform of issues and current preservation topics are to be coordinated for the monthly *Perspectives* email newsletter.
- Produce two issues of *Façade* magazine, maintaining its professional level and refreshing graphics as appropriate. Seek to increase advertising to support publication expense.
- Work with a graphic designer to refresh CRS's logo. Create a usage guide and train staff.
- Integrate CRS's website, online calendar, Facebook, and Instagram to increase engagement and decrease redundancies.
- Increase social media traffic with more staff participation on Facebook and Instagram through training and coaching.
- Update all areas of CRS's website to remove redundancy. Make sure images are relevant and recent. Check text for timeliness and accuracy according to current practices.
- Create a mobile friendly version of CRS's website.
- Collaborate with Cleveland State University on a follow-up publication memorializing the success and impact of the Legacy Cities conference. Aim for national publication for high-level distribution.
- Fill the void in the staff with a part-time or full-time marketing and communication trained employee. Convene an events committee or ad-hoc groups as appropriate.



Photo by Joanne Montagner-Hull

CRS staff members marked the 1,000th "like" on the organization's Facebook page by posing for a picture together and thanking their supporters.

Goal: Accentuate the heritage of diverse audiences for deeper engagement

- Complete the “Know Our History” project by distributing all eight email bulletins about themes of African-American heritage in Cleveland, updating our website to reflect this survey work, and developing and creating a final product.
- Produce a *Monograph* issue devoted to the provocative viewpoints related to historic preservation and race.
- Initiate the Digital Photo Archiving Project to make CRS’s collection of photos, slides, and digital files organized and accessible. This project will be done in collaboration with Cleveland Memory, and may help to inform events, special projects, and the Annual Fund.

Goal: Set an excellent example as steward of our own historic property and provide a safe and pleasant work environment for CRS staff members and tenants of the Benedict House

- Address CRS’s sinking parking lot through trustee assistance and fund raising as required.
- Engage CRS trustee expert to develop a sustainability plan to truly “green” the Sarah Benedict House.
- Increase property security as recommended including an expanded camera system.

The pride and joy of CRS, the historic Sarah Benedict House, was built in 1883. Now the headquarters for historic preservation in Northeast Ohio, the Benedict House has been home to CRS since 1999. CRS makes space available to community organizations for meetings and also rents out the house for private events.

- Reorganize staff seating/office assignments in the Benedict House. Each staff member should have sufficient work space and program areas should be grouped together for efficiency.
- Engage trustees for property stewardship assistance by appointing a SBH champion, establishing a property maintenance committee or add the Sarah Benedict House to the purview of the Programs Committee.
- Register the Sarah Benedict House on visitor and tourist sites as a point of interest in Cleveland.

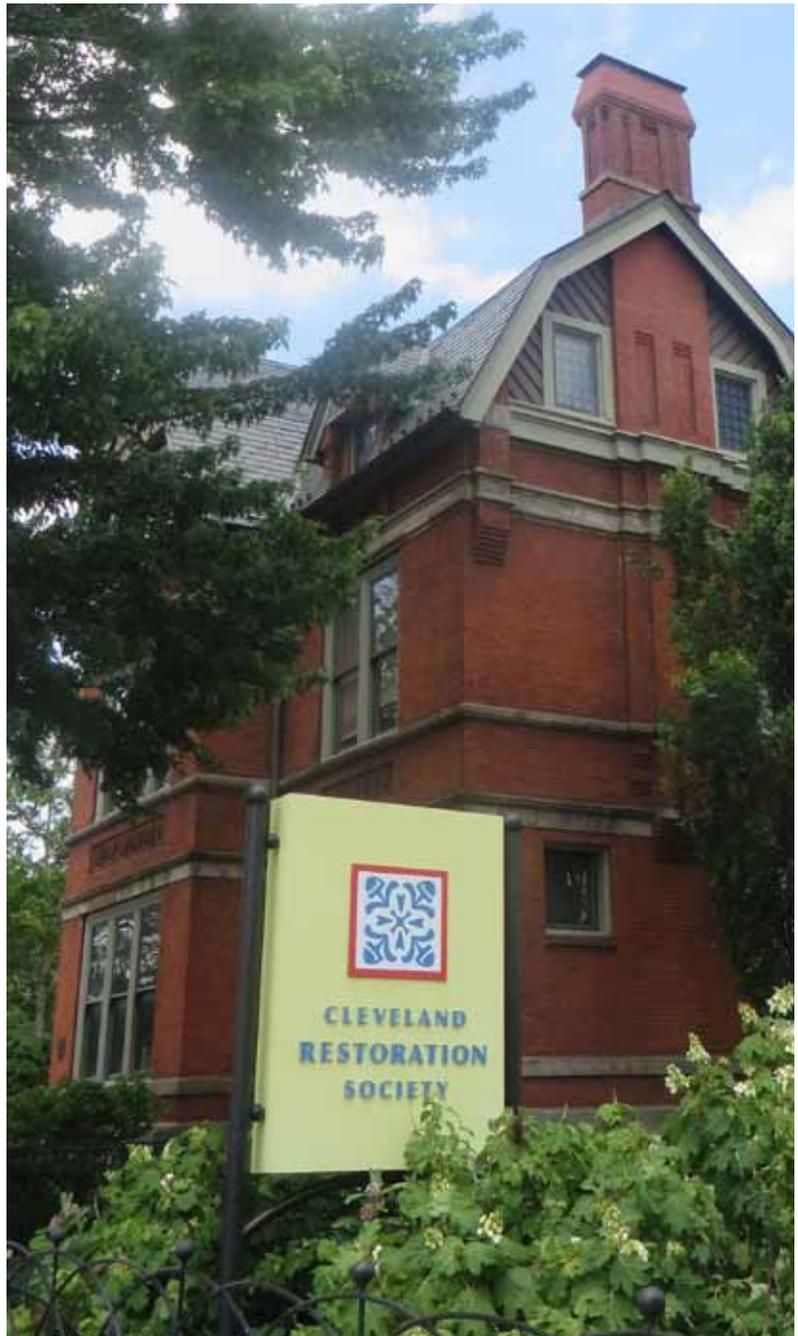


Photo by Jessica Dawson



In November 2013, CRS celebrated reaching the milestone of its 1,000th loan facilitated through the Heritage Home ProgramSM. Representatives from CRS, Cuyahoga County, the City of Cleveland, and KeyBank and the homeowner joined together to cut a ceremonial ribbon. Staff members from both CRS and Detroit Shoreway Community Development Organization were present to mark the occasion.

Ensure the mission of historic preservation in Cleveland by deepening CRS's organizational capacity

Goal: Increase engagement by the Board of Trustees and Community Advisors

- Conclude the board process of creating a stronger expectation of trustee involvement. To date a written draft includes trustee commitment to time on a specific CRS project; contribution of professional expertise toward a specific project or initiative; and a continuous commitment to financial support for the majority of CRS ticketed programs and annual fund.
- Rework the roster of Community Advisors.
- Make sure all trustees and advisors have the necessary tools to be CRS "ambassadors". This may include training sessions, the creation of new print pieces, or new material on CRS board-accessed web pages.
- Complete the naming of the front room of the Sarah Benedict House "The Trustees Parlor" in honor of those trustees who donate \$20,000 to the endowment.

Goal: Look for opportunities to increase revenue streams

- Develop new strategies for increasing the number of dues-paying members. Focus on lapsed members first. Consider mission-, program-, and event-oriented approaches to encourage membership. Be creative.
- Enrich the experience of the current members of the Elizabeth Parsson Society for legacy giving through special considerations, events, and other touches. Look for ways to grow this circle.
- Be more proactive in securing corporate support through sponsorship of events and materials, annual fund, and membership.
- Identify new sources of foundation support to diversify CRS's base of support.

Goal: Strengthen staff members' individual professional development trajectories

- Continue best practices of coaching and performance appraisals, after a six-month probationary period for new hires and annually thereafter.
- Strengthen the alignment of staffing to organizational goals by adapting as necessary.
- Review and revise job descriptions as needed.
- Support the next generation of professionals to strengthen the base of CRS.
- Prepare for leadership transition as the natural growth of an organization.
- Fully communicate the succession plan to the board and staff.



**CLEVELAND
RESTORATION
SOCIETY**

Goal: To continue to maintain best practices in financial records and reporting and to streamline procedures using the best of modern technology

- Update financial policies and procedures to be consistent with current best practices.
- Determine the best practice for regular reconciliation between the Raiser's Edge and QuickBooks systems and implement it.
- Investigate how to connect Raiser's Edge with the Blackbaud Mobile platform for more automated record keeping.
- Explore automated methods of depositing checks to our main checking account.

Goal: To continue to provide competitive salaries and employee benefits at an appropriate cost to CRS

- Examine ways to reduce health insurance expenses, including the Small Business Health Program through the Affordable Care Act.
- Examine ways to improve the administration of the CRS 403(b)(7) Retirement Plan.

Goal: To update and improve the CRS infrastructure so as to make the staff and volunteers as productive as possible

- Examine ways to improve computer programs and equipment.
- Explore usage of GIS software to enhance our services and mission.
- Review and update insurance coverages as needed or appropriate.

Through high-quality events, CRS strives to provide experiences of artistic and cultural value to our constituency. Our September 2013 benefit was held at ASM International, a significant piece of modern architecture and one of the youngest historic structures in Ohio to be listed in the National Register of Historic Places. The evening featured dining al fresco and gazing at the stars through Buckminster Fuller's geodesic dome, the largest open-work lattice dome in the world. Rehabilitation of the building was an award-winning project at CRS's 2013 Celebration of Preservation.



Photo courtesy of Cleveland Restoration Society