Historic Preservation • Environmental Education • Community Gatherings
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Executive Summary

Evanston Lakehouse and Gardens (ELHG) is a 501c3 nonprofit incorporated in 2015 to restore and repurpose the Harley Clarke mansion (former Evanston Art Center). Once restored ELHG will provide a welcoming and inclusive venue for environmental education, outdoor recreation, community gatherings and events. The project has four primary phases:

- **Phase 1 - Develop Terms with the City of Evanston**: In order to conduct fundraising and devote additional resources to the project, it is necessary to have a clear agreement with the City that provides certainty that the project can proceed as benchmarks are achieved. ELHG believes that a 50-year lease (with a renewal provision) at $1/year provides sufficient long-term certainty for donors and the organization to make investments in the building.

- **Phase 2 – Capital Campaign**: ELHG plans a capital campaign for approximately $5.25 million to restore the property and provide an initial stewardship endowment. We estimate the Capital Campaign will require a minimum of 18 months.

- **Phase 3 – Restoration**: The restoration of the property will require an estimated 12-18 months. It is possible to phase some work to open portions of the property sooner (i.e. coach house rehab first).

- **Phase 4 – Operations**: In partnership with several other community groups ELHG will operate the property for the public benefit providing environmental education, outdoor recreation and community gathering and event space. ELHG will hire a full-time staff to oversee operations, building maintenance and ongoing fundraising and development activities.

Overall the goals of the project can be described as:

1. Restoring and preserving the physical aspects of the Harley Clarke property including the Jens Jensen gardens and the historic structures with recognition of their contribution to Local Landmark and National Register status.
2. Providing a meaningful and educational experience to people who visit ELHG, taking advantage of the unique environment and setting afforded by ELHG and surrounding natural spaces, with a focus on hands-on educational experiences related to the Great Lakes and associated environments and broader issues of sustainability.
3. Providing a meaningful leisure experience and community gathering space that enhances the community and neighborhood.

We seek to achieve the above goals through a variety of programs and activities, some of which will be free and some of which will charge a fee, with the goal of the overall operation being financially self-sustainable. We recognize that our overall goals may come into conflict under certain circumstances, and there will need to be constant effort by the ELHG Board of Directors to ensure an appropriate balance of activities and programs to achieve our goals and meet the needs of the community.
Mission and Purpose
The mission of Evanston Lake House and Gardens (ELHG) is to preserve and restore the Harley Clarke Mansion - Evanston’s only public lakefront facility - by creating an inspiring community space that fosters appreciation of the environment, the arts, and the rich cultural history of Evanston.

ELHG’s plan has the following elements:

- Restore and repurpose the Harley Clarke building;
- A commitment to socially and economically inclusive programming that will be inviting to people from all corners of our community and visitors;
- The building and surrounding Jens Jensen gardens will remain open to the public;
- ELHG will provide and promote environmental education, outdoor recreation, cultural tourism, and community meeting space;
- Rental of the building for events and meetings as well as rental space for a planned light-fare café to further our mission of connecting people with the environment, outdoors and their community and to financially support the non-profit operations of the property.

All of these elements are consistent with the Lakefront Master Plan, which was unanimously approved in 2008 by Evanston’s City Council, including events and a café. ELHG also has an interest in working with the City to improve the surrounding parkland, for example, by restoring the dunes, adding interpretive signage in the Jens Jensen Gardens and dunes and creating a non-motorized boat launch and waterfront trail at Lighthouse Beach.

Core Values
The Core Values of Evanston Lakehouse & Gardens as adopted by our Board of Directors are:

- **Visitor Experience:** ELHG will create an inspiring, enjoyable and educational experience for all residents of Evanston and for visitors.

- **Community:** ELHG will serve the community and provide a unique community meeting and event space on the lakefront. ELHG will collaborate with residents, local governments, institutions, non-profits, and businesses to deliver on mutual education, cultural and economic goals.

- **Education** – ELHG will provide educational experiences in partnership with schools and non-profits to leverage the property’s unique historical, cultural and environmental resources.

- **Environment** – ELHG will restore and maintain the Jens Jensen gardens as a peaceful, ecologically sustainable site for reflection and appreciation of the environment.

- **Stewardship** – ELHG will ensure the long-term viability of the community mansion through robust programming, a solid financial plan, and development of a strong board and membership.

Partners
Over the past 24 months ELHG has been conducting outreach to several partners who have an interest in our work. Several of these organizations have written Letters of Support, and many others are currently actively engaged in helping to develop the ELHG program and curriculum. Our partners and supporters include:

• **Open Space Preservation and Environmental Education**: LakeDance, Liberty Prairie Foundation, Alliance for the Great Lakes, North Shore Sustainability Education Partnership (NU Center for Water Research, NU Office of STEM Education Partnerships), D65 STEM Program, LakeDance, Evanston Lakehouse & Gardens, Alliance for the Great Lakes, City of Evanston Water Department.

• **Local Community Groups**: Central Street Neighbors Association.

• **Local Businesses**: Ananda Within Yoga, Heritage Bicycles, Stuart-Rodgers Photography.

**Finances and Fundraising**

ELHG has been conducting grass roots fundraising to support our ongoing advocacy and planning efforts to create a viable partnership with the City of Evanston. To date, we have raised $9,750 from more than 70 individual donors to support our administrative and marketing costs (see Figure 1). Our current Income Statement does not reflect the countless hours of in-kind services from our volunteers, Board and several partners including Glantz Design, Kihm Residential, WWBrown, Inc, Thomas O’Connor Associates Architects, Wiss Janney Elstner Associates, Stuart-Rodgers Photography and LakeDance.

**Figure 1.** Evanston Lakehouse & Gardens Income Statement, Aug 11, 2015 to Feb 6, 2017.

<table>
<thead>
<tr>
<th>Revenues</th>
<th>$ 9,753</th>
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</thead>
<tbody>
<tr>
<td>Donations</td>
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</tr>
<tr>
<td><strong>Total Revenues</strong></td>
<td>$ 9,753</td>
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</table>

<table>
<thead>
<tr>
<th>Expenses</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative</td>
<td>$ 69</td>
</tr>
<tr>
<td>Banking Fees</td>
<td>$ 102</td>
</tr>
<tr>
<td>Website</td>
<td>$ 108</td>
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<td>Events</td>
<td>$ 123</td>
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<td>Legal/Tax Fees</td>
<td>$ 860</td>
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<tr>
<td>Marketing</td>
<td>$ 2,949</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td>$ 4,211</td>
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</table>

| Cash Position                    | $ 5,542 |

From conversations with Donors, we know that there is significantly more capacity and interest in the project from our existing donor base. However to realize major capital gifts an agreement with the City of Evanston providing certainty is required. In the meantime, we are working to secure pledges, that while not binding, will demonstrate the strong support in the community. ELHG wants to pair its private fundraising with the $250,000 that City Council previously approved for repairs to Harley Clarke, as well as any additional public funds that are available in the future. There are also many grant programs for historic preservation and environmental restoration and education that ELHG plans to pursue (Appendix 3).

ELHG worked with a local, experienced fundraiser to develop a fundraising pyramid for the project which reflects the Restoration Plan and Budget outlined below (Figure 2). ELHG projects that the Capital Campaign will require a minimum of 18 months to complete.
Figure 2. Fundraising Pyramid for ELHG Capital Campaign.

<table>
<thead>
<tr>
<th>Donation Level ($)</th>
<th># Donors</th>
<th>Total $</th>
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<tbody>
<tr>
<td>20</td>
<td>1000</td>
<td>20,000</td>
</tr>
<tr>
<td>50</td>
<td>750</td>
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<td>200</td>
<td>100,000</td>
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<td>1,000</td>
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<td>8</td>
<td>800,000</td>
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<td>500,000</td>
<td>4</td>
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</tr>
<tr>
<td>1,000,000</td>
<td>2</td>
<td>2,000,000</td>
</tr>
<tr>
<td><strong>2,544</strong></td>
<td><strong>5,257,500</strong></td>
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</table>

Restoration Plan and Budget

ELHG’s restoration plan and budget is based on the intended uses of the building as well as a review of all pre-existing architectural and engineering studies of Harley Clarke and our own assessment of the building conducted during two separate Open Houses (August 2016 and February 2017). We were greatly assisted in these efforts by Kihm Residential, WWBrown, Inc, Thomas O’Conner Associates Architects, and Wiss Janney Elstner Associates, all of whom are qualified professionals and have previously worked on restoring historic, architecturally significant buildings. Several conceptual configurations and uses of space were presented to the Harley Clarke Planning Committee previously.

While we believe our estimates below to be reasonable (Figure 3), a final budget will require additional access to the building for more detailed assessments and planning.

Figure 3. DRAFT Restoration and Capital Campaign Budget.

<table>
<thead>
<tr>
<th>Base Construction Hard Costs</th>
<th>3,023,424</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main House Construction</td>
<td></td>
</tr>
<tr>
<td>Coach House Construction</td>
<td>750,000</td>
</tr>
<tr>
<td>Subtotal Construction</td>
<td>3,773,424</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other Hard Costs</th>
<th>510,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Landscaping - Jens Jensen Garden</td>
<td>200,000</td>
</tr>
<tr>
<td>Furniture Fixture &amp; Equipment</td>
<td>250,000</td>
</tr>
<tr>
<td>Phone &amp; Data</td>
<td>35,000</td>
</tr>
<tr>
<td>Signage &amp; Exhibits</td>
<td>25,000</td>
</tr>
<tr>
<td>Subtotal Other Hard Costs</td>
<td></td>
</tr>
<tr>
<td>Stewardship Endowment</td>
<td>500,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Soft Costs</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Architects and Engineers</td>
<td>300,000</td>
</tr>
<tr>
<td>Landscape Architect</td>
<td>50,000</td>
</tr>
<tr>
<td>Insurance/Builder’s Risk</td>
<td>5,000</td>
</tr>
<tr>
<td>Permits</td>
<td>30,000</td>
</tr>
<tr>
<td>Other Consultants, Landscape Architect</td>
<td>130,000</td>
</tr>
<tr>
<td>Subtotal Soft Costs</td>
<td>515,000</td>
</tr>
</tbody>
</table>

| Total Project Cost                            | 4,798,424 |
| Stewardship Endowment                        |           |
| Total Capital Campaign Goal                   | 5,298,424 |
Operations
ELHG will feature educational and community programming designed to engage and inspire residents and visitors of every age to connect with the natural environment and each other.

Education – The house, surrounding grounds, and adjacent public beach and lighthouse will provide both a living learning laboratory and an engaging backdrop for experiential education related to the environment (especially Lake Michigan), history and architecture. The house can serve as a multi-disciplinary field trip destination for Evanston and neighboring schools and community organizations such as the Evanston Ecology Center, the Evanston Library, the YMCA and Y.O.U. ELHG will focus on hands-on, experiential education opportunities that are not available in the classroom setting. The facility will provide an excellent destination to study ecology, gardening, urban water cycles, the natural history of Evanston, maritime history, and both the fine arts theory and practical STEM aspects of architecture. The historic Jens Jensen gardens can serve as an outdoor classroom to study biology, ecology and landscape architecture. High school vocational training possibilities exist through the rehab process, sustainable urban gardening, urban water management and at the café and event space.

Outdoor Recreation and Healthy Lifestyles – The restored building and gardens can also help to promote healthy lifestyles. The Lighthouse Landing park complex is currently used by many groups including garden clubs, running clubs, yoga groups, cycling clubs, birders, beachgoers and walkers. The flexible indoor space, shelter from the elements and restrooms provide by ELHG will enhance the experience of these visitors and allow for year-round activities. We have begun discussions with community organizations interested in expanding their outdoor recreation offerings to the site. Potential users include an expanded Aquatics Camp, Ecology Camp, YMCA and Senior groups.

Exhibit and Community Meeting Space – With its setting on Lake Michigan and adjacent to serene park space, ELHG will provide exhibit space for appreciation of the arts, including indoor and outdoor music performances, historical and art exhibit space and cultural gatherings. ELHG will also provide community meeting space for local non-profits, citizen and neighborhood groups and unique cultural events including concerts, holiday gatherings, art exhibits and history exhibits.

Events – ELHG plans to make the mansion available for event rentals that are consistent with connecting people to the natural environment and each other. We believe that the restored mansion, with its lakefront setting will become a premier destination on the North Shore. Rentals would be consistent with an appreciation of the environment, arts and cultural history, and may include birthday parties, cooking classes, non-profit fundraising events, corporate meetings and retreats, wedding and baby showers, bar mitzvahs, birthdays, anniversaries and weddings. There are several examples of successful public and/or non-profit mansions in the Chicago area and nationally that use event rentals to provide a source of revenue to support a sustainable business plan for historic mansions. Events will be considerate of the many other public uses of the Lighthouse Landing complex and the surrounding residential neighborhood. Further ELHG proposes to offer event space at a heavily discounted rate for non-profits and community groups to ensure fair access to the house. Event rental is consistent with the Lakefront Master Plan, which states on Page 91, “The plan proposes to make use of the beautiful grounds of both the Arts Center and Lighthouse for low impact public functions such as weddings and small receptions, and an improved event lawn (5) is proposed for the space east of the Lighthouse, between the Fog and Signal houses.”
Revenue
ELHG has developed our plan under the assumption that the enterprise must be financially self-sufficient. The revenue model contemplates several compatible uses to generate sufficient revenue to fund a professional staff and building maintenance so that ELHG can deliver on its mission related to education, historic preservation and outdoor recreation. Revenue for sustainable operations of the property will come from the following sources (see Figure 4 and Figure 5):

1. **Program Fees**: When school groups visit the Great Lakes Discovery Center and participate in the unique educational programs ELHG will offer, there will be a small fee per individual. In our current model we assumed an initial fee of $2 per person. This compares favorably with other experiential education facilities in the area. For example, The Grove’s average fee is $6.25 per person and brings in $120,000 per year. We did not factor in revenue from other potential sources such as an expanded Ecology Camp, Aquatics Camp, cooking classes, and Senior programs.

2. **Grants and Donations**: ELHG will pursue state, federal and local grants to support the programs and the historic preservation of the building and Jens Jensen gardens. Further, we will develop a ‘Lakehouse Stewards’ program for annual donations, similar to many nonprofit membership programs. Finally, we will work to have a planned giving program for larger philanthropic gifts. Current estimates of philanthropic revenue is approximately $150,000 per year (see Appendix 3 for grant opportunities).

3. **Event and Meeting Rentals**: ELHG will rent the house out for appropriate events. These could include corporate meetings, wedding showers, baby showers, bar/bat mitzvahs, weddings, fundraisers and birthday parties. Other comparable venues in the area (Woman’s Club of Evanston, The Grove) are currently turning people away because they are over-booked. At the Grove, they are booked two years in advance for the Redfield Estate facility. With its lakefront location, architectural details and rich natural history, ELHG would represent a unique and premium event space on the North Shore. Events would generate business for local caterers, hotels and bus/shuttle companies which would create jobs and generate tax revenue for the City of Evanston.

4. **Café Rental**: ELHG will rent space to a light fare café. In year one, the projected rental rate is $5,000 per month, increasing to $8,000 per month in year 5. ELHG’s Board has interviewed several café operators – both in Evanston and Chicago – who have confirmed that the site is viable and attractive, and that they would be interested in opening a new location. The café would not only support ELHG’s operations, it would also create jobs and generate tax revenue for the City of Evanston.

Operating Expenses
Projected Operating expenses reflect the costs of a full-time staff to run ELHG and deliver educational programs and maintain the building and grounds. Expenses for building maintenance, ground maintenance, utilities, insurance, bookkeeping, fundraising and marketing are included in our projections (Figure 4). Projections are based on comparable public and non-profit historic buildings for which data was available, including: The Grove, The Woman’s Club of Evanston, Highfield Hall in Falmouth, Massachusetts, and The Evanston Art Center (prior to relocation).
Figure 4. Pro Forma 5-year Budget

<table>
<thead>
<tr>
<th>Revenue Source</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
<th>Total</th>
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<tr>
<td>Donations and Gifts</td>
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<td>3,000,000</td>
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<td>125,000</td>
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<td>50,000</td>
<td>55,000</td>
<td>55,000</td>
<td>60,000</td>
<td>270,000</td>
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<td>Subtotal Donations and Gifts</td>
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<td>6,095,000</td>
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<td>32,000</td>
<td>66,400</td>
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<td></td>
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<tr>
<td>Events and Rentals</td>
<td>-</td>
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<td>98,000</td>
<td>144,000</td>
<td>216,000</td>
<td>494,000</td>
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<td>Corporate and Small Group Rentals</td>
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<td>61,000</td>
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<td>Café Rental Income</td>
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<td>84,000</td>
<td>96,000</td>
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<td>35,000</td>
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<td>35,000</td>
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<td>Investment Income</td>
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<td>Total Revenue</td>
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<td>651,481</td>
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<td>475,942</td>
<td>490,220</td>
<td>520,075</td>
<td>2,094,439</td>
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<td>32,782</td>
<td>148,009</td>
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<td>53,045</td>
<td>54,636</td>
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<td>27,318</td>
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<td>Marketing</td>
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<td>21,218</td>
<td>21,855</td>
<td>22,510</td>
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<td>Bookkeeping and Accounting</td>
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<td>5,305</td>
<td>5,464</td>
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<td>Other program related expenses</td>
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<td>31,827</td>
<td>32,782</td>
<td>125,509</td>
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<tr>
<td>Subtotal Operation and Maintenance</td>
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<td>475,942</td>
<td>490,220</td>
<td>520,075</td>
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<td>Fundraising expenses</td>
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<td>0</td>
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<td>2,895,154</td>
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<td>514,927</td>
<td>530,075</td>
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<td>Net Income / (Loss)</td>
<td>20,000</td>
<td>517,768</td>
<td>(301,321)</td>
<td>(95,400)</td>
<td>1,539</td>
<td>121,407</td>
<td>263,993</td>
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<td>Operating Reserve / Cash Balance:</td>
<td>5,542</td>
<td>25,542</td>
<td>543,310</td>
<td>241,990</td>
<td>146,589</td>
<td>148,128</td>
<td>269,535</td>
</tr>
<tr>
<td>(+) Net Income / (Loss)</td>
<td>20,000</td>
<td>517,768</td>
<td>(301,321)</td>
<td>(95,400)</td>
<td>1,539</td>
<td>121,407</td>
<td>263,993</td>
</tr>
</tbody>
</table>

Figure 5. Revenue Assumptions Summary

<table>
<thead>
<tr>
<th>Revenue Source</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td># of Education Program Participants</td>
<td>2,000</td>
</tr>
<tr>
<td>Revenue per Participant ($/person)</td>
<td>2</td>
</tr>
<tr>
<td># of Large Events</td>
<td>6</td>
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<tr>
<td>Revenue per large event ($/event)</td>
<td>6,000</td>
</tr>
<tr>
<td># of corporate rentals</td>
<td>6</td>
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<tr>
<td>Revenue per corporate rental ($/rental)</td>
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<tr>
<td># of small group rentals</td>
<td>12</td>
</tr>
<tr>
<td>Revenue per small group rental ($/rental)</td>
<td>200</td>
</tr>
</tbody>
</table>

*Note:* does not assume revenue from potential uses such as expanded Ecology Camp, Aquatics Camp, Cooking Classes, Senior programs or other potential uses.
Staffing Model
ELHG will have a full-time professional staff to ensure proper stewardship of the facilities, further educational and cultural programming goals and conduct non-profit management and fundraising. Initially ELHG will hire four full-time staff members:

- **Executive Director** - overall non-profit management, responsible for developing partnerships and programming, developing the board and cultivating donors.
- **Education Director** - coordinate educational programs and work with the partners in the North Shore Sustainability Education Partnership, as well as other North Shore and Chicagoland schools. We are currently exploring a partnership with LakeDance in which they would assume the role of Education Director at ELHG. In our projections above, we have not factored in this potential synergy.
- **Events Coordinator** – coordinate and book events and ensure that events are respectful of the neighborhood and the mission of ELHG.
- **Facilities Manager** - maintain the building, gardens and facilities for delivery of programming.

Governance
ELHG is governed by a seven-person Board of directors (Appendix 1). We seek to grow our board to include interested citizens, experts in our areas of operations and representatives from the City of Evanston. Under a public private partnership with the City, the 7th Ward Alderperson, the Head of the Parks and Recreation Department, and a representative from the Parks and Recreation Board could have seats on the ELHG Board to ensure continued adherence to ELHG’s Mission and Core Values. We also recognize that over the long term, the City’s needs may change and ELHG may need to change and adapt to meet those needs. The Board would be responsible for helping staff with these strategic decisions.

FAQs & Concerns

- **Cost to the City**
  Annual operations and maintenance costs will be the responsibility of ELHG and its partners, not the City. Private donations will be raised for the renovation cost, which will be supplemented by the modest sum of $250,000 dedicated by the City for repairs.

- **Parking**
  There are currently 58 parking spaces at the Lighthouse Beach parking lot. From October to May the parking lot is rarely full, generally with only a few vehicles. During these 8 months, it is unlikely that parking issues will arise. All large events at ELHG will be required to use a shuttle or valet service to minimize impact on beach use. From June to September is when the potential exists for additional, regular visitors to ELHG for educational activities and puts stress on the parking lot. ELHG will encourage all visitors to use public transportation or bikes for regular visits, especially during the summer months. A Divvy Station at the beach could further reduce congestion. The parking lot is already oversubscribed in the summer months. The City could issue parking permits to Evanston residents, or sell them along with beach tokens, or use another mechanism to better regulate parking at the site. Valet services for events might access the Northwestern Parking Garage, Orrington School blacktop (similar to NU football games) or Evanston Hospital. Further, as driverless car technology continues to develop, within a few years parking may not be an issue because cars will drop off passengers and not require on-site parking.
- **Impact of Events on the neighborhood**
  Large group events will be limited during the summer months (June to September) so as to minimize neighborhood congestion. ELHG would suggest allowing for 4 summer events to start, which will garner high rents to better subsidize ELHG’s core mission of environmental education and historic preservation. This would represent 4 days out of 120 days in summer months. These dates could be awarded through a lottery system if they are in high demand. All events will be required to end by 10 pm on weeknights (Sunday-Thursday) and by 11 pm on weekends (Friday-Saturday). Strict adherence to City of Evanston Noise Ordinances will be required for all events. In our current 5-year Budget we project 6 large group events in our first year of operation (6 months), increasing to 24 in our fourth year of operation. This represents only 24 days out of 365 days per year.

- **Food and Garbage Trucks**
  The Cafe is intended to be a light-fare food service. Appropriate garbage containers, dumpsters, animal proofing and regular pick-ups will ensure that trash does not become a nuisance. A more organized garbage service could also help the public beach, which commonly has overflowing trash bins, especially on summer weekends. Deliveries of food or other items related to events will be limited to normal business hours of 9am – 6pm. In comparison to existing food service and other deliveries along Sheridan Road for Northwestern University, the operations at ELHG would be quite minor.

**Risks**
There are several risks to our business plan, which we believe can be mitigated through thoughtful and active management by ELHG’s staff and Board. Risks include:

- Insufficient Fundraising – ELHG can be flexible to phase the rehab and growth of programs.
- Low Operating Revenue – ELHG will remain flexible on exploring grants, partnerships and new revenue models to ensure sustainable operations to deliver on our charitable purpose.

**Successful Case Studies**
There are many examples of successful precedents for the ELHG business model regionally and across the country, which have informed this strategic plan. Following is a brief summary of some successfully restored community mansions:

**The Grove**, Glenview, IL – The Grove in Glenview is 143 acres of ecologically diverse prairie grove land preserved and maintained by the Glenview Park District. The Grove was the home of Dr. John Kennicott whose son, Robert Kennicott, is known for his plant and animal specimen collections at the Smithsonian Institution in Washington, D.C., for founding the Chicago Academy of Sciences, and the exploration of Russian America that led to the purchase of Alaska. The Grove was designated a National Historic Landmark by the U.S. Department of the Interior in 1976. It is on the National Registry of Historic Places. The Grove partners with the U.S. Fish and Wildlife Service and Chicago Wilderness on habitat preservation and educational programming.

The Grove includes the Redfield Estate which was built in 1929. The Tudor-style house was the home of Kennicott descendants and acclaimed authors Louise Redfield Peattie and Donald Culross Peattie. The Redfield Estate faces a wide, grassy clearing where weddings and receptions take place year-round and deer gather at twilight. A large main room provides a gracious setting for parties and reunions. The wooded environment surrounding Redfield Estate includes two gazebos, a reflecting pool, and tranquil gardens that are ideal for special events or introspective pursuits. The Redfield Estate is available for rental to the public.
Highfield Hall and Gardens, Falmouth, Massachusetts – **Highfield Hall and Gardens** is a restored 1878 estate that now serves as a vibrant center of cultural and community life on Cape Cod. In 1994 a group of citizens formed the Highfield Hall and Gardens nonprofit to rescue the building from demolition after several decades of neglect. They secured a lease from the Town of Falmouth for $1 per year with Highfield Hall responsible for all repairs and maintenance of the building. They ultimately raised $8.5 million to restore the building and fund an endowment for their organization. They now successfully operate the mansion as a community and cultural center with a variety of events and exhibits that make the organization financially self-sufficient. In addition, they continue to have a development program to raise private donations to supplement revenue from events and programming. Today Highfield Hall has over $8 million in assets, of which over $2 million is cash and investments which serve as an endowment.

**Berger Mansion**, Chicago, IL – The **Berger Mansion** is part of the Chicago Park District. The property includes two of the few remaining Sheridan Road mansions built in the early 1900s. In 1988, the Park District rehabilitated the homes which are now used as a recreational building and a cultural center. The park includes a historic landmark coach house that for the past 9 years has hosted the Waterfront Café which has become a popular destination and raised the profile of the park overall. Berger offers a variety of cultural programs such as jewelry making, acting, guitar, tap, modern, flamenco, senior line dance and much more. It also offers many activities, including senior aerobics, computer, jewelry making, and writing classes; and theater and music programs for children and adults.

**Cheney Mansion**, Oak Park, IL – The **Cheney Mansion** in Oak Park was designed in 1913 by Charles E. White, Jr., a student of Frank Lloyd Wright. The 10,000 square foot mansion has several reception rooms and 2.5 acres of landscaped grounds. The property is currently managed by The Park District of Oak Park. The grounds are open to the public and the mansion is available for self-guided tours unless there is a private event. The mansion has become a premier event destination in Oak Park for fundraisers, community events and weddings. Since hiring a full-time professional director, the Cheney mansion has had an operating surplus based on the strong demand for event space.
Appendix 1: ELHG Board of Directors

**Thomas Hodgman** - Tom is the Director of Conservation Transactions for The Nature Conservancy, a global environmental non-profit. Tom is responsible for developing and structuring large landscape conservation projects with a particular focus on forest conservation. Since joining The Nature Conservancy in 2011, Tom has led conservation acquisitions of over 170,000 acres ($150 million) in places such as the Olympic Rainforest and Cascade Mountains of Washington and the Crown of the Continent in Montana. An ETHS alum (1999) and former Camp Echo counselor and trip guide, Tom has a deep and abiding love for Evanston. Tom holds a B.A. from Wesleyan University in Environmental Science, a Masters in Forestry from the Yale School of Forestry, and an M.B.A. from the Yale School of Management. He lives in Evanston with his wife, Amy, his son, Sam, and his daughter, Quinn.

**Patrick L. Donnelly** - Patrick is a Television Commercial Executive Producer with an emphasis on budgets and accounting for television production. He has produced commercial shoots and national campaigns for many Fortune 500 companies including Allstate, Best Buy, Craftsman Tools, Target, the Chicago White Sox, and NASCAR. He received his B.A. from Ohio University in Film and Television and is a graduate of St. Ignatius High School.

**Jeffrey P. Smith** - Jeff, a longtime Evanston resident, earned his B.A. at Northwestern and his J.D. at Harvard Law School, where he was an editor of the Harvard Civil Rights-Civil Liberties Law Review. Well-known for his knowledge of environmental issues, Jeff served from 2013-2015 as General Counsel of the Illinois Department of Natural Resources and earlier in his career as assistant corporation counsel for the City of Chicago. His extensive volunteer record includes appointment to City of Evanston and State of Illinois task forces studying offshore wind energy, three terms as president of the well-respected community organization, the Central Street Neighbors Association (CSNA), and service on the initial board of directors of Citizen’s Greener Evanston.

**Emily Williams Guthrie** – Emily has been an Evanston resident since 1970, serving as Third Ward Alderman from 1993 until 1997. She is the founder and first President of the Warren Cherry Scholarship Fund. Emily serves as treasurer of the Preservation League of Evanston. In 2007 she vice-chaired the Save the Civic Center campaign. Since 1984, she has been the Chairman of Evanston Safety Town. Today, Emily is a lawyer, real-estate agent, yoga teacher and mother of two.

**Benjamin Iverson Lumpkin** - Ben is a fiction writer and screenwriter/story editor for documentary and narrative film. He previously served as a Director of First Mid-Illinois Bank & Trust, National Association and First Mid-Illinois Bancshares Inc. from January 2009 to July 2014. He also served as a public relations officer for an international outreach program at Yale and is a regional Emmy Award Winning writer. Ben received his Bachelor’s degree in History from Yale University and Master’s degree in Journalism from Northwestern University.

**John J. Walsh** - John is a law firm partner and trial lawyer focusing on the defense of attorney, physician, and nursing home liability cases, employment discrimination, and civil rights and law enforcement liability. He has successfully tried more than 50 cases to verdict as lead trial counsel in state and federal courts in northeastern Illinois. John has a J.D. from Loyola University of Chicago School of Law and a B.A., magna cum laude, from the University of Notre Dame. His bar admissions include the Illinois Supreme Court, U.S. Court of Appeals for the
7th Circuit, U.S. District Court for the Northern District of Illinois, General and Trial bars, and the U.S. District Court for the Western District of Wisconsin. He has been recognized as an Illinois Super Lawyer® in 2009-15. John is a 39-year resident of Evanston, former Board member of the Evanston Mental Health Association, a founding member of the Central Street Neighbors Association (CSNA), and its current President. He is a former city reporter for the Evanston Review.

**Alexander Block** - Alex is a committed public organizer and a 23 year resident of Evanston. He worked for Congresswoman Jan Schakowsky in Washington, D.C. and for President Barack Obama in Ohio. Alex helps coach Miami University’s nationally recognized mock trial program — where he is a two-time All-American competitor and one of the most decorated competitors in collegiate mock trial history. Alex is a 2015 graduate of Miami University with degrees in Political Science and History. He is an ETHS alum (2010), having represented his peers on the District 202 School Board in 2009 and in 2010, and Alex is a former YMCA Camp Echo counselor.
Appendix 2: DRAFT Environmental Education Program - LakeDance

1. Purpose

The location of the Harley Clarke Mansion, hereafter referred to the Evanston Lakehouse or ELHG, is ideal for providing environmental and science-based education programs for the entire community. Below is a proposal to utilize the property consistent with the City of Evanston’s intent to identify community groups and non-profit organizations that may wish to use the property and identify additional program uses and associated costs for the property.

This plan outlines a cost-effective way to begin using the property immediately and expand future uses.

2. Goals

- Enhance existing environmental education programs being offered in the Evanston Public Schools
- Expand experiential learning around science, technology, art and math (STEAM)
- Conduct programs that combine science and art such as dance and visual arts

3. Key Success Measures

- Content: Based on evaluations, measure student and teacher changes in
  - Knowledge gained around concepts of Water Cycle, Watershed, Storm water, Runoff, Infiltration, etc.
  - Attitudes about the environment and participant’s ability to create positive change
- Metrics: Participation from every school in district 65, elementary, middle, and magnet schools included
- Set goal for use of indoor and outdoor space every day of the school year

4. Benefits to Community

Our proposed program would benefit the community by providing an engaging and rigorous opportunity to participate in the stewardship of a global significant resource, our Great Lake. Evanston will be identified as a pioneer in Great Lakes conservation at a time when most of the world is being forced to take radical steps toward conservation goals of water, the new gold. The programs will enhance students learning opportunities and build a sense of place in their community.

5. Operating Plan

Education Program

- Direct Pipes and Precipitation programming in Evanston schools
  (coordinate all aspects of the 3rd and 6th grade watershed curriculum; see appendix for breakdown)
- Expand Rain Garden initiative to all schools (Recruit schools, apply for funding, plan and deliver school-by- school programming (See appendix for breakdown.)
● Co-chair Watershed Collective: North Shore Learning and Action Community (plan and deliver monthly academic year learning adventures for adults)

LakeDance (501c3)

● Dance Lab (research intersections of dance and science) in weekly dance/lab sessions with the goal of learning science kinesthetically and communicating Great Lakes and climate-relevant processes to the public via performance demonstrations
● Creating mounted works of public performance generated from Dance Lab activities

Next Generation Science Standards (NGSS)

● NGSS alignment education task force: Continue to work with D65 staff and NU STEM liaison staff to align Pipes and Precipitation to NGSS and to assist in the School District’s transition to NGSS by looking at overall science curriculum and advocating for place-based education

New Place Based Programming at the Lakehouse

● Develop programming specific to the spaces within and without the ELHG that can be used by students in other District 65 grades not yet participating in the “Pipes and Precipitation” program and by students in schools not enrolled in D65
● Assist with the design, creation and maintenance of public learning spaces indoor and outdoors including a multi-room Great Lakes installation and outdoor loose parts play spaces
● Expand the Watershed Collective adult education programming
● Coordinate and welcome after school programming by outside organizations such as Y.O.U. and YM and YWCA
● Help plan summer activities as needed

Program Management

● Manage personnel (volunteer and hired) to assist with scheduling, field trip delivery and classroom teaching including interns
● Continue to participate in the North Shore Sustainability initiative
● Maintain partnerships: meet regularly with Environmental Leaders in the city and region, seek out new collaborations, share findings with board or council
● Attend conferences, meetings and webinars for professional development and program improvement
*Pipes and Precipitation duty Breakdown*

1. Pipes and Precipitation in District 65: Coordinate all field trips and classroom visits for the two grade levels participating (currently 3rd and 6th).
   - Third Grade: set up and lead all field trips (incl. transportation) and post-trip classroom visits.
     - Attend an existing Professional Development each year OR
     - Meet/email lead teacher from each school. Go over program: pre-test, watershed model, water cycle, Magic School bus book, field trip, post trip visit.
     - Organize 15 field trips of 2 hours each to the Lighthouse Beach Dunes in the fall or spring; easier if they go in spring so 6th grade can go in the fall.
       - Find fall and spring date spreads that work for City of Evanston Water Treatment Plant.
       - Create Bus schedule spreadsheet for D65 and share with Transportation.
     - Post Trip: visit each classroom (3-4 classrooms) at 15 schools for one classroom period each (40 min.) to do Movement Model of Water Treatment Process.
     - Ask teachers to do post-test with kids. Follow up with teachers: What worked? What needs revision?
   - Sixth Grade: set up and lead all field trips (incl. transportation) and pre-trip school lab. Coordinate Field Guide training and scheduling for each field trip.
     - Meet/email lead teacher from each school. Pre-test? Figure out where/how this project is placed in the larger water unit (what other watershed activities they will be doing).
     - Set Field Trip date and then set school lab date. Optimally this will occur in one 40-minute period and one 80-minute period. If both aren’t possible, have teachers perform water quality test on their own and then perform Infiltration Lab and schoolyard exploration during a double period.
     - Recruit 5 Field Guides per field beach, not including you, the Beach Captain.
     - Organize all field trip materials including schedule to share with teachers ahead of time.

**Rain Garden Project Break Down**

- Form an Action Team that includes School communication, Education, and Design/Build.
- Work with the school according to a school-year-long timeline.
  - Spring before: meet with school administration following their lead for teacher and grade collaboration. Connect with those teachers.
  - Fall kick off: attend PTA meetings and use other means of communication to let school population know about the project.
  - Begin regular (2-3 classes per month) work/learn classes with students in chosen grade. (2-3 classes per month means up to 12 visits to the school per month if a school has 4 classes in a grade).
  - Maintain planning meetings with Action Team to assure all aspects are happening on time such as plant ordering in the winter.
  - Schedule spring design and dig dates.
  - Spring share will align with and existing spring school-wide event.
Clare Tallon Ruen, MFA, Founder and Director

- LakeDance: Embodied Watershed Study
- Pipes and Precipitation: Integrated Place-Based Stormwater Curriculum

Clare is a dancer and Great Lakes enthusiast. Combining these passions in LakeDance, for which Tallon Ruen uses movement to educate Evanston and Chicago youth about the Great Lakes and directs a young performer group toward the creation of original Great Lakes inspired pieces. These creations have been presented at conferences featuring water and environmental issues such as at the Audubon’s Wild Things Conference, at Michigan Tech’s Great Lakes Institute, and most importantly, on the beach. Her work in Evanston schools has been expanding and has been supported by awards from local and national community and environmental organizations.
Appendix 3: Potential Grant Funding Opportunities

These potential grant-funding opportunities are from the City of Evanston City Council Meeting packet from October 12, 2015.

Dune Restoration:
Staff reviewed both state and federal agencies as well as private foundations that have program areas from which the City and partners could seek potential funding if dune restoration was necessary. Agencies and Foundations include:

- **Grand Victoria Foundation.** From the GVF website: “We invest our resources to strengthen early education opportunities for young children, protect natural lands and waterways, and promote economic vitality through robust employment development.” Funding is available to registered public charities that engage in projects that “promote public policies, instituting high quality stewardship and conservation practices, and aligning resources and actions to maximize land and water health and resilience.” Letters of inquiry for grant programs are due the first Fridays in May and October. Projects that have been funded include restoration of wetlands and prairies, acquisition of land for conservation, organizational and operational support, and training activities. More information can be found at the Grand Victoria Foundation’s [website](#).

- **Gaylord and Dorothy Donnelly Foundation.** From the Foundation’s website, “We offer general operating and project-specific grants that lead to landscape-scale land preservation and stewardship. We support efforts throughout the Chicago region with a current focus on five priority landscapes: Calumet, Forest Preserves of Cook County, Grand Kankakee, Hackmatack National Wildlife Refuge and Midewin National Tallgrass Prairie.” According to the Foundation’s [website](#), several grant recipients over the past few years have had work associated with coastal management and dune restoration. Recipients include the Dunes Learning Center, Save the Dunes Conservation Fund, and the Alliance for Great Lakes.

- **The Great Lakes Restoration Initiative** awards approximately $13.9 million under a Request for Applications for projects each year that further the goals of the Great Lakes Restoration Initiative. The initiative is a partnership of federal, tribal, state, and local partners. Each year a series of categories are identified and applicants apply if they meet that year’s initiatives. The 2015 categories are 1) Invasive Species Prevention; 2) Invasive Species Control; 3) Urban Watershed Management Implementation; 4) Agricultural Watershed Management Implementation; and 5) Maumee River Watershed Nutrient Prevention Pilot Program. Each year the categories are different; past grant categories have included items such as reducing exposure to toxic substances from fish consumption, Lake Erie Cooperative Science and Monitoring Initiative. Funding for these projects is through the U.S. EPA, U.S. Fish & Wildlife, and U.S. Forest Service.

- **Sustain Our Great Lakes (SOGL).** According to SOGL’s [website](#), “The mission of Sustain Our Great Lakes (SOGL) is to sustain, restore and protect fish, wildlife and habitat in the Great Lakes basin by leveraging funding, building conservation capacity, and focusing partners and resources toward key ecological issues.” Administered by the National Fish and Wildlife Foundation, the program receives funding and other support from ArcelorMittal, U.S. Environmental Protection Agency, U.S. Fish and Wildlife Service, U.S.D.A. Forest Service, National Oceanic and Atmospheric Administration, and U.S.D.A. Natural Resources Conservation Service. A significant portion of program funding is provided by the Great Lakes Restoration Initiative (GLRI), a federal program designed to protect, restore and enhance the Great Lakes ecosystem. The program achieves its mission, in part, by awarding competitive grants for on-the-ground habitat restoration. Funding priority is given to projects that restore aquatic connectivity, stream and riparian habitat, wetland habitat, and coastal habitat. Sustain Our Great Lakes offers funding annually, and grant awards range from $25,000 to $1.5 million. Eligible recipients include non-profit organizations, state, tribal and local governments, and educational institutions.
• **Syndication of the Federal Tax Credits.** Syndication involves the transference of the tax credits to a corporate investor in exchange for additional equity capital that can help finance the project. There are many large corporate entities that can syndicate federal tax credits. One such entity is the for-profit arm of the National Trust for Historic Preservation: the National Trust Community Investment Corporation (NTCIC), which makes equity investments in real estate projects that qualify for federal historic tax credits and when available, state historic tax credits and New Markets Tax Credits.

• **Cook County Class L Incentive Program.** Administered by Cook County Assessor’s Office, this incentive provides a reduced property tax assessment ratio to a locally designated industrial or commercial property that has undergone a rehabilitation whose budget is at least 50% of the building’s market value.

• **Preservation Easements.** Administered by various entities. In Illinois, Landmarks Illinois is a non-profit preservation advocacy organization that accepts preservation easements. A preservation easement is a voluntary legal agreement between a property owner and a preservation organization to preserve and protect all open-air sides of a historic structure. Under current tax laws, an easement donation may qualify as a charitable contribution, with federal income tax benefits, based on the value of the easement, as determined by a qualified appraiser.

• **Preservation Heritage Fund Grants.** This grant program is administered by Landmarks Illinois. This grant and loan program provides monetary assistance to preserve or protect significant structures or sites in the state of Illinois that are under threat of demolition, imminent deterioration, or are of such architectural importance that their preservation will benefit the public and Illinois community.

• **The Architectural and Transportation Barrier Removal Deduction.** Administered by the IRS. See also Chapter 11 in Publication 535, Business Expenses. This is the same program as the 50% Disabled Access Tax Credit. This is a deduction (not a credit) of up to $15,000 per year of the costs of making a facility or public transportation vehicle more accessible to, and usable by persons who are disabled or elderly by removing barriers.

• **Public Museum Grants Program.** Administered by the Illinois Department of Natural Resources, Illinois State Museum. This program is designed to assist museums in expanding and upgrading facilities and creating new exhibits to enhance the ability of public museums to meet their missions.

• **Matching Grants from the National Trust for Historic Preservation** Administered by the National Trust for Historic Preservation. The National Trust has a variety of matching grant programs for non-capital projects, including the Preservation Services Fund, which provides funding to non-profit, public agencies, or educational institutions for consultant services, educational programs, or conferences.

• **Donnelley Preservation Fund for Illinois:** Provides non-profit organizations and public agencies matching grants from $500 to $5,000 (typically from $3,000 to $5,000) for preservation planning and education efforts. Funds may be used to obtain professional expertise in areas such as architecture, archeology, engineering, preservation planning, land-use planning, fundraising, organizational development and law as well as preservation education activities to educate the public, owners, and business owners. Many organizations have found that these funds provided the crucial boost to get a project off the ground and attract other potential contributors to the project. There is one grant round per year on February 1, with an additional round on June 1 and October 1, depending on the availability of funding. The Preservation Fund application is available online.

• **Alphawood Foundation:** A Chicago-based, grant-making private foundation working for an equitable, just, and humane society. Each year they award grants to organizations, primarily in the areas of advocacy, architecture and preservation, the arts and arts education, promotion and protection of the rights of LGBT citizens and people living with HIV/AIDS, and other human and civil rights. Notably, they provided a $10 million grant to help restore the Frank Lloyd Wright Unity Temple in Oak Park, Illinois, and a $2 million grant towards the 606 linear urban park in Chicago.
• **Driehaus Foundation:** The Driehaus Foundation benefits individuals and communities by supporting the preservation and enhancement of the built and natural environments through historic preservation in neighborhoods throughout Chicago, encouragement of quality architectural and landscape design, and conservation of open space. The Foundation also supports arts and culture, investigative reporting and government accountability, and organizations that provide opportunities for working poor people. Today the Foundation awards approximately $5,000,000 annually in grants, a portion of which is in partnership with the John D. and Catherine T. MacArthur Foundation.

• **Hart Family Fund for Small Towns:** Assists small town preservation and revitalization initiatives around the country, with a focus on towns with populations of 5,000 or less. The Fund provides nonprofit organizations and public agencies matching grants from $5,000 to $10,000 for preservation planning and education efforts. Funds may be used to obtain professional expertise in areas such as architecture, archaeology, engineering, preservation planning, land-use planning, fund raising, organizational development and law as well as preservation education activities. The Hart Family Fund uses the Preservation Fund application form which is available for download from the National Trust website.

• **Johanna Favrot Fund for Historic Preservation:** Provides non-profit organizations and public agencies matching grants ranging from $2,500 to $10,000 for projects that contribute to the preservation or the recapture of an authentic sense of place. Individuals and for-profit businesses may apply only if the project for which funding is requested involves a National Historic Landmark. Funds may be used for professional advice, conferences, workshops and education programs.

• **Cynthia Woods Mitchell Fund for Historic Interiors:** Provides nonprofit organizations and public agencies matching grants ranging from $2,500 to $10,000 to assist in the preservation, restoration, and interpretation of historic interiors. Individuals and for-profit businesses may apply only if the project for which funding is requested involves a National Historic Landmark. Funds may be used for professional expertise, print and video communications materials, and education programs.

• **Jeffris Heartland Fund:** Established by the Jeffris Family Foundation to support the development of important historic preservation projects in the states of Iowa, Illinois, Indiana, Michigan, Minnesota, Missouri, and Ohio. The fund makes grants in the range of $5,000 to $50,000 for Historic Structure Reports and other advanced planning studies. Funds must be matched dollar-for-dollar with cash from sources unrelated to the National Trust and the Jeffris Family Foundation. Established 501(c)(3) non-profit organizations or government agencies in partnership with a 501(c)(3) organization are eligible to apply. Applicants must be able to demonstrate the viability of their project through the submittal of early planning studies, and must be ready for the preparation of a Historic Structure Report, or other advanced planning studies, leading toward a community-centered capital fund drive. Projects in communities with more than 150,000 in population are NOT eligible to apply. Priority will be given to projects located outside of metropolitan areas.

• **Illinois Clean Energy Community Foundation.** The ICECF has a variety of grants for public and non-profit organizations to make energy efficiency upgrades to their properties. There are also grants for new construction and major renovation.