



**WILSON BRUCE
EVANS HOME**
HISTORICAL SOCIETY

Preserving a Legacy. Reshaping Our Future.

STRATEGIC PLAN

2025-2028

Facilitated by



Rosa Consulting

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Executive Summary

The Wilson Bruce Evans Home Historical Society (Evans HHS) is a transformative cultural heritage organization dedicated to preserving and activating the legacy of Wilson Bruce Evans, an abolitionist and Underground Railroad operative, Black entrepreneur, and cabinetmaker in Oberlin, Ohio.

This 2024 Landscape Analysis provides a comprehensive assessment of Evans HHS's history, mission, comparative positioning, target audiences, innovations, and strategic opportunities for sustainability and growth. Built in 1856, the Evans home is a rare surviving structure built and owned by a free African American family before the Civil War. It has been designated as a National Historic Landmark and is now a vital platform for public education, social justice, and cultural preservation.

The site's programming centers on African American history, public history education, intergenerational learning, and civic engagement. Evans HHS operates with a descendant-led, justice-focused model, leveraging immersive interpretation, oral history, and community storytelling to offer unique historical narratives that resonate across generations. The organization also implements digital strategies to expand its national reach, including augmented reality tours and a podcast series.

This analysis benchmarks Evans HHS against peer institutions and identifies key partnerships with HBCUs, preservation networks, local tourism boards, and arts councils. Revenue opportunities include earned income from guided tours and merchandise, grant funding from national and regional sources, and community-based event programming. Evans HHS stands poised to become a national leader in inclusive historic preservation and Black heritage education.



Strategic Plan 2025 – 2028

INTRODUCTION

The Strategic Plan for the Wilson Bruce Evans Home Historical Society (Evans HHS) outlines a commitment to preserving the home as a vital public space for community engagement and education centered on the legacy of the Wilson Bruce Evans family. It aims to elevate the home's historical significance within both local and broader African American heritage while building organizational capacity through strengthened internal operations, leadership development, improved programming, and increased fundability, all to ensure the long-term success of its mission.

The Strategic Plan was a six-month process that involved a comprehensive assessment of the organization's current state, engaging leadership, staff, participants, and community stakeholders in meaningful dialogue. Through this collaborative effort, the team identified opportunities to expand access, deepen relationships, and more effectively educate and engage the public.

PROCESS



UNDERSTAND THE STRATEGIC PLANNING ENVIRONMENT

The organization participated in several comprehensive assessments to evaluate and understand the strategic plan's current environment. The following areas were reviewed through self-evaluation. The assessments led to the development of an organizational analysis that helped to guide the development of the SWOT analysis and initial strategic priorities.

Sustainability Assessment

Evans HHS demonstrates strong community support, committed leadership, and valuable partnerships, yet faces financial uncertainty as major funding concludes by 2026. Current resources are restricted to specific project phases, with no contingency plan and limited flexibility. The organization is exploring donor engagement and endowment development to strengthen long-term viability. While internal capacity is lean, strategic staffing and succession planning are priorities. Program evaluation is informal but evolving toward data-driven practices. Communications and outreach are effective locally, with opportunities for regional expansion. Overall, Evans HHS is well-positioned to enhance sustainability through targeted investment in funding, capacity-building, and adaptive programming.

Funding Viability Assessment

The funding viability assessment for Evans HHS reveals a portfolio of capital and programmatic support primarily sourced from public grants and private donations. Major awards from the National Park Service—including Save America’s Treasures (\$283,250) and the African American Civil Rights Network Grant (\$739,400)—have significantly advanced rehabilitation efforts, though both are either pending or one-time allocations with limited remaining duration. Additional support from the Nord Family Foundation (\$150,000 across three grants), the State of Ohio (\$250,000), and smaller grants such as the Ohio History Fund and Certified Local Government provide targeted capital funding but lack long-term stability. Membership and private donations, totaling \$31,150 annually, represent the most consistent unrestricted funding stream, though currently reliant on a small base of committed donors. Overall, while funding adequacy scores average 3 out of 4 for intended uses, the stability and pipeline outlooks are weaker, with most sources scoring 1 out of 4 due to short grant durations and limited renewal prospects. Strategic efforts to diversify and strengthen the funding pipeline will be essential to sustain operations and expand programming over the next three years.

Fundraising Observations and Recommendations

The Executive Director participated in a Funding and Philanthropic Assessment to drill down into Evans HHS’ philanthropic outcomes, explore what has contributed to its success, and determine how it can build on these results to sustain its responsiveness to those it serves.

Evans HHS has had some initial success in raising initial dollars. It is important to note that while there are important funding opportunities at the federal level, there are concerns with the ability to garner the appropriate federal support. However, Evans HHS has only just begun its fundraising journey. The goal is to build this site as a destination for tourists nationally. But to build nationally means to build locally.

Evans HHS must develop strong awareness of its mission and attract individuals and families to engage in its mission. The vitality of Evans HHS will be reliant on the foot-traffic and online traffic to engage in the content provided through the educational and programmatic offerings; and the ability to engage in a volunteer network and eventually build a strong membership base. With limited infrastructure to build awareness it will be especially important to leverage the volunteer network to support the one and only staff member, the executive director.

Landscape Analysis

The landscape analysis for Wilson Bruce Evans Home Historical Site (Evans HHS) provides a foundational understanding of its geographic reach, populations served, and strategic focus areas. Located in Oberlin, Ohio, a historically significant center for abolitionist and educational movements; Evans HHS anchors regional cultural preservation while expanding its national visibility through Black heritage networks. The site serves a diverse constituency, including local educators, Black families, cultural tourists, social justice advocates, and scholars of African American history. Its core focus areas—African American history and culture, public history education, historic preservation, intergenerational learning, and civic engagement—inform program development and outreach strategies. By benchmarking against peer institutions and analyzing comparative services, Evans HHS is positioned to adopt innovative, justice-centered approaches that enhance visitor experiences, strengthen partnerships, and support sustainable growth.

Partner/Competitor Assessment

The current partnership assessment reveals a strong network of collaborators that contribute meaningful expertise, visibility, and institutional credibility to your work in historical preservation and cultural programming. Several existing partnerships, such as with the Oberlin Heritage Center and the Cleveland Restoration Society, are well-established and could be further leveraged for consulting, fundraising, and co-promotion. Others, like the Oberlin College connection and Oberlin African-American Genealogy and History Group, show potential for deeper engagement through improved coordination and shared space utilization. Future partnerships identified, including the Western Reserve Historical Society and Heritage Ohio, align with strategic goals around tourism, visibility, and sustainability.

Strong Current Partnerships:

- Oberlin Heritage Center (C): High collaboration level. Supports historical programming and enhances credibility. Opportunity: Leverage their tour expertise and fundraising experience.
- Cleveland Restoration Society (C): Trusted thought partner on historic preservation. Potential to deepen co-promotion and rehabilitation strategy support.
- City of Oberlin (C): Productive collaboration via the CLG grant. Opportunity: Strengthen visibility and explore DEI initiatives and local funding partnerships.
- Lorain County Historical Society (C): Mutually supportive through events; partnership is stable with room to expand impact.

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Moderately Engaged Partners:

- Oberlin African-American Genealogy and History Group (C): Shared programming and lists; collaboration level is modest. Opportunity: Deepen engagement through co-use of space and joint initiatives as OAAGHG revitalizes.
- Oberlin College (C): Functional academic linkages. Desire for easier coordination and greater visibility. Potential: Promote student engagement and elevate public history understanding.

Future Partnerships:

- Western Reserve Historical Society (F): Sought for tourism promotion and operational expertise in heritage interpretation.
- Heritage Ohio (F): Targeted for visibility through media exposure and advocacy platform.

Wilson Bruce Evans HHS should prioritize high-impact partnerships for strategic outreach, especially those that can support promotion, programming, or fundraising goals. Create a formal engagement plan that includes mutual objectives, points of contact, and a timeline for activation. Strengthen internal systems to track partnership performance and refine your “asks” based on each partner’s strengths.

VALIDATE OR MODIFY THE MISSION, VISION, AND VALUES

Mission, Vision, and Values Assessment

The Mission, Vision, and Value Analysis was conducted to provide a systematic examination of Evans HHS mission statement, vision statement, and core values. The purpose of this analysis was to gain a comprehensive understanding of how these foundational elements contributed to the organization's identity, strategy, and impact.

Mission

The mission of Wilson Bruce Evans Home Historical Society is to preserve and transform the home of Wilson Bruce Evans into a living monument that honors the legacy of the Evans family, abolitionists, Underground Railroad operatives, and lifelong advocates for racial justice. Through this space, we aim to educate, engage, and empower the local community and national audiences with historical resources, public programs, and youth-driven initiatives that carry forward the ongoing struggle for racial equity in America.

Vision

To be recognized by 2035 as a pre-eminent destination for learning about Black heritage and the long freedom struggle serving our local community, schools, regional visitors, national allies, and international collaborators. This will be accomplished through transformative education, inclusive programming, and civic engagement that empowers us to face our shared future and shape it together.

Values

Value	Alignment with Mission
Inclusion	Emphasizes the importance of representing and valuing diverse histories and communities.
Education	Recognizes the transformative power of learning and understanding history as a foundation for growth.
Equity	Shows commitment to justice and fairness, ensuring that historically marginalized voices are acknowledged and uplifted.
Preservation	Exhibits the Society’s desire to protect historical narratives, buildings, and legacies against erasure or threat.
Community	Cultivates a sense of belonging, collaboration, and service, both locally and nationally.
Sustainability	Commits to responsible environmental stewardship and organizational resilience, ensuring that both our natural resources and our mission endure for future generations.

ASSESS STRENGTHS, WEAKNESSES, OPPORTUNITIES, AND THREATS

Stakeholder Interview Results

The Stakeholder Interview process yielded meaningful insights into the identity, influence, and future potential of Evans HHS. This robust engagement effort included 17 community survey responses, 14 individual interviews, and 1 electronic submission. Participants offered thoughtful reflections on the organization’s perceived role, areas for improvement, and opportunities for growth. These collective findings provide essential direction as the Society assesses its impact and considers strategic approaches to deepen community relevance and expand its offerings.

Recommendations include:

- **Restoration & Accessibility** – Complete restoration with clear timelines and phased public access options.
- **Financial Sustainability** – Diversify funding streams and create a membership program for long-term support.
- **Community Engagement & Programming** – Expand youth and community-focused educational programs and dialogues.
- **Visibility & Marketing** – Strengthen branding and digital presence to elevate Evans HHS locally, regionally, and nationally.
- **Organizational Development** – Invest in staffing, succession planning, and strategic partnerships to ensure sustainability.

Feedback from both individual and community stakeholders reflects dedicated support for Evans HHS’s mission to preserve African American history and the Evans family legacy while engaging the community through education and storytelling. Stakeholders praised the organization’s leadership, authentic descendant involvement, and role in fostering pride, belonging, and historical awareness. Overall, stakeholders see Evans HHS as uniquely positioned to become a museum, educational hub, and national landmark, with priorities focused on completing restoration, securing financial sustainability, deepening community engagement, and building organizational capacity.

SWOT Analysis

Drawing from the full range of assessment results, a comprehensive SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis was conducted to inform the development of targeted strategic priorities.

STRENGTHS	
Historical Significance	The Evans House and WBE Home preserve and highlight Oberlin’s connection to the Underground Railroad and African American history, providing a unique and important historical narrative.
	Taking the time to refurbish and rebuild the home, demonstrating commitment to preserving its historical and cultural significance
	Envisioned as an interactive space that educates and inspires change, offering more than just a collection of artifacts.
	The vision is to make people aware of the history of racial inequality and how the programs offered address these challenges.
	Dedicated to honoring progressive values, supporting historical figures, and promoting racial and social justice.
Educational Mission	Dedicated to increasing public understanding of Black history in America through historical inquiry and learning, making it a valuable educational resource.
	Positive feedback from the community about the depth of historical knowledge, informative lectures, and the opportunity to learn about new aspects of history.
Community Engagement	Attracts visitors and serves as a center for Black history in Oberlin, fostering a sense of belonging and collective engagement.
	Strong involvement of Evans family descendants, which adds authenticity and personal connection to the project.
	Strong network of champions that can be leveraged for community and financial support.
Leadership	Board members are highly committed to the mission, with many expressing a willingness to support it financially and through active involvement.
	Board members are highly committed to the mission, with many expressing a willingness to support it financially and through active involvement.
	Board members possess expertise in various areas and are familiar with the programs and services offered by Evans HHS, which enhances their ability to contribute effectively.
	The involvement of Evans family descendants fosters a sense of pride and connection, making the project more authentic and meaningful.

WEAKNESSES	
Funding & Financial Sustainability	Heavy reliance on government funding exposes the organization to vulnerability from political shifts, administrative delays, and policy changes, threatening program stability and long-term sustainability.
	Current funding streams have limited access to unrestricted or flexible dollars that can support innovation and growth.
	Absence of a multi-year strategic funding roadmap limits the organization's ability to align financial planning with project milestones and phases.
	Lack of identified earned income strategies or revenue-generating initiatives.
	Membership model is underutilized as a potential source of engagement, financial support, and advocacy leverage.
Programs & Events	Renovation project lacks a clearly articulated phasing strategy, which could limit donor confidence, project transparency, and efficiency.
	No cohesive marketing and communications strategy exists to build excitement, drive attendance, or deepen community understanding of the renovation and related programming.
	Program effectiveness is difficult to quantify due to limited use of outcome-based evaluation tools and evidence-based practices.
	Future programming lacks definition, making it difficult to engage partners, funders, and participants in long-term planning or support.
Partnerships	Absence of a formalized partnership strategy limits the organization's ability to cultivate mission-aligned collaborations that could enhance capacity, visibility, and resource access.
	The relationship with key institutional partner Oberlin College remains underdeveloped and is not strategically activated to drive mutual benefit, talent pipelines, or co-branded initiatives
Leadership & Staffing	Board and leadership meetings are not consistently structured around strategic priorities, leading to inefficiencies and missed opportunities for governance engagement.
	Organization lacks a documented succession plan, leaving leadership transitions vulnerable to disruption.
	No comprehensive staffing and volunteer development model exists to support the organization's future scale or capitalize on community energy and capacity.
Community Engagement	Community engagement is limited in scope and depth, particularly in reaching broader regional audiences.
	Program and event planning is occasionally misaligned with participant needs (e.g., outdoor events held in cold weather), impacting engagement and attendance.
	Public understanding and visibility of both current initiatives and long-term development plans remain low, hindering broader support and momentum.

OPPORTUNITIES	
Programming	Expand sessions on African American families and historical lessons relevant to today's political climate, focusing on educating youth about Black history and its impact on the future.
	Continue offering educational programs even while restoration is ongoing and explore new ways to engage attendees beyond Oberlin.
	Expedite efforts to open the house for public entry, ensuring the community can fully experience its historical significance.
	Implement proposed models from landscape analysis to expand program delivery
	Partner with Firelands Association for Visual Arts (FAVA) and the Oberlin Center for the Arts to develop exhibitions and programs highlighting African American history and culture, aligning with Evans HHS's mission.
Partnerships	Opportunities to collaborate with other historical sites, educational institutions, and community organizations to enhance programming and outreach.
	Engage with Historic House Networks to enhance visibility by being a key destination on African American heritage itineraries.
	Utilize resources from Assembly for the Arts to connect with artists and creatives for collaborative projects that enhance the visibility and impact of Evans HHS.
Marketing & Communications	Refine promotional materials like brochures and magnets to create a stronger visual identity and enhance appeal.
	Strengthen connections with broader audiences by increasing awareness and fostering involvement beyond Oberlin.
Funding	Evaluate internships and fellowships with partner universities to cultivate revenue opportunities
	Establish joint events and conferences with local organizations to generate income through ticket sales. Sponsorships, vendor partnerships, and merchandise
	Expand membership offerings to offer a tiered package for greater engagement and revenue generation
	Apply for grants from the Ohio Arts Council and the Community Foundation of Lorain County to support cultural events, artist residencies, educational workshops, and community engagement projects.

THREATS	
Political Climate	Changes in political administration and policies, particularly those affecting DEI (Diversity, Equity, and Inclusion) initiatives, could impact funding and support.
Sustainability	Ongoing regulatory delays and bureaucratic obstacles could continue to hinder progress and access.
	Ensuring sustained interest and funding for the project could be challenging, especially during the restoration phase.
Regulations	Frustration over delays and regulatory hurdles preventing full access to the house, as well as slow restoration efforts.
	Managing the historical project comes with bureaucratic obstacles.

DEVELOP GOALS, STRATEGIES AND ACTIONS

Strategic Priorities

The Strategic Plan is organized into six core priority areas, each shaped by thorough assessments and meaningful stakeholder input. To ensure alignment with organizational needs, the Strategic Planning Task Force and Management Team collaborated to define clear goals and success measures. These priorities are designed to address identified challenges, build on existing strengths, capitalize on emerging opportunities, and proactively manage potential risks.

The identified strategic planning priority areas included:

- Priority 1. **RENEW: Renewing a Landmark**
- Priority 2. **EDUCATE: Illuminating History Through Educational Excellence**
- Priority 3. **ENGAGE: Expanding Community Voice & Engagement**
- Priority 4. **PARTNER: Forging Powerful Partnerships**
- Priority 5. **LEAD: Advancing Leadership & Governance**
- Priority 6. **SUSTAIN: Ensuring Long-Term Sustainability**

Goals

PRIORITY 1. RENEW: Renewing a Landmark	
1.1	Goal 1.1: Develop a phased plan to restore, activate, and sustain the Wilson Bruce Evans Home and grounds.
1.2	Goal 1.2: Build sustainable staffing and volunteer systems that support the launch of the home.

PRIORITY 2. EDUCATE: Illuminating History Through Educational Excellence	
2.1	Goal 2.1: Develop a clear and actionable plan for future educational programs that aligns with the mission, addresses community needs, and supports the organization’s long-term strategic goals.
2.2	Goal 2.2: Strengthen program effectiveness by using evidence-based practices and performance metrics to ensure ongoing quality.

PRIORITY 3. ENGAGE: Expanding Community Voice & Engagement	
3.1	Goal 3.1: Develop and carry out a regional engagement strategy that increases visibility, participation, and public connection to the organization’s mission.
3.2	Goal 3.2: Create and launch a communications and marketing strategy that builds excitement and support for renovations and future initiatives across diverse audiences.

Priority 4. PARTNER: Forging Powerful Partnerships

4.1	Goal 4.1: Strengthen local strategic partnerships by implementing a clear framework to identify, cultivate, and sustain collaborations that advance our mission and strategic priorities.
4.2	Goal 4.2: Strengthen national strategic partnerships by creating a framework to engage cultural institutions, universities, and heritage networks that elevate the Evans Home’s visibility and amplify its national impact.

Priority 5. LEAD: Advancing Leadership & Governance

5.1	Goal 5.1: Redesign board and governance practices to be more strategic, time-efficient, and focused on long-term impact and organizational oversight.
5.2	Goal 5.2: Develop and implement an executive leadership succession plan to ensure organizational continuity and stable leadership.

Priority 6. SUSTAIN: Ensuring Long-Term Sustainability

6.1	Goal 6.1: Develop and implement a multi-year diversified funding plan that increases individual and corporate donors, institutional philanthropy, unrestricted grants and earned income.
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Goals and Objectives

For each strategic goal, the Strategic Planning Task Force and Management Team identified one or more supporting objectives. These objectives were crafted using the SMART framework to ensure clarity, measurability, and accountability. Completion of all outlined objectives represents successful attainment of the corresponding goal.

Leadership established a timeline for implementation, resulting in a four-year strategic plan designed to meet defined success measures and advance the organization’s long-term priorities.

Goals and Objectives by Year

WILSON BRUCE EVANS HOME HISTORICAL SOCIETY



2025 - 2028

STRATEGIC GOALS AND OBJECTIVES

		2025	2026	2027	2028
 1 RESTORE: Restoring a Legacy					
1.1	Goal 1.1: Develop a phased plan to restore, activate, and sustain the Wilson Bruce Evans Home.	X	X	X	X
1.1.1	Objective 1.1.1: Complete phased renovations that preserve the historic integrity of the Evans Home while creating functional spaces for interpretation, exhibits, and community gatherings.	X	X	X	X
1.1.2	Objective 1.1.2: Launch public programming aligned with Phase 2 and 3 of development including historical tours, cultural exhibits, and youth-driven initiatives, that position the Home as a living historic center by 2028.	X	X	X	X
1.2	Goal 1.2: Build Sustainable Staffing and Volunteer Systems that support the launch of the home.	X	X		
1.2.1	Objective 1.2.1: Develop and implement written staffing plans that define roles, responsibilities, and training pathways for both employees and key contractors during renovation, launch, and ongoing operations by 2026.	X	X		
1.2.2	Objective 1.2.2: Establish a comprehensive volunteer engagement plan that recruits, trains, and retains at least 50 active volunteers annually to support tours, events, and preservation activities by 2026.	X	X		

WILSON BRUCE EVANS HOME HISTORICAL SOCIETY



2025 - 2028

STRATEGIC GOALS AND OBJECTIVES

2	EDUCATE: Illuminating History Through Educational Excellence	2025	2026	2027	2028
2.1	Goal 2.1: Develop a clear and actionable plan for future educational programs that aligns with the mission, addresses community needs, and supports the organization’s long-term strategic goals.	X	X		
2.1.1	Objective: 2.1.1: Create a template and ongoing process to review and approve new programs, along with a timeline and list of proposed programs for the next two years, by December 31, 2025.	X			
2.1.2	Objective 2.1.2: Establish a process to regularly gather and use community input and participant feedback to guide program development by March 2026.		X		
2.2	Goal 2.2: Strengthen program effectiveness by using evidence-based practices and performance metrics to ensure ongoing quality.	X	X	X	
2.2.1	Objective 2.2.1: Produce a formal report by December 31, 2026 that documents current participant engagement and summarizes the key data points the organization is actively tracking.	X	X		
2.2.2	Objective 2.2.2: Establish and implement a standardized process for defining program outcomes and evaluating overall effectiveness by March 31, 2027.		X	X	

WILSON BRUCE EVANS HOME HISTORICAL SOCIETY



**2025 - 2028
STRATEGIC GOALS
AND OBJECTIVES**

3	ENGAGE: Expanding Community Voice & Engagement	2025	2026	2027	2028
3.1	Goal 3.1: Develop and carry out a regional engagement strategy that increases visibility, participation, and public connection to the organization's mission.	X	X		
3.1.1	Objective 3.1.1: Complete an analysis of current engagement strategies, identifying what is working, what is not, and the reasons why, by December 2025.	X			
3.1.2	Objective 3.1.2: Implement a comprehensive engagement strategy that measurably increases visibility within the regional community by December 31, 2026.		X		
3.2	Goal 3.2: Create and launch a communications and marketing strategy that builds excitement and support for renovations and future initiatives across diverse audiences.	X	X	X	
3.2.1	Objective 3.2.1: Formalize our marketing and communications plan to include a compelling story, visual media, and multiple communication channels tailored to target audiences by December 2026.	X	X		
3.2.2	Objective 3.2.2: Enhance and maintain an ongoing awareness campaign that highlights current programs and upcoming initiatives, customized for different audiences].		X	X	X

WILSON BRUCE EVANS HOME HISTORICAL SOCIETY



**2025 - 2028
STRATEGIC GOALS
AND OBJECTIVES**

4 PARTNER: Forging Powerful Partnerships	2025	2026	2027	2028
4.1 Goal 4.1: Strengthen local strategic partnerships by implementing a clear framework to identify, cultivate, and sustain collaborations that advance our mission and strategic priorities.	X	X	X	X
4.1.1 Objective 4.1.1: Develop and implement a defined process to identify, build, and maintain strong relationships with local and regional partners that align with and advance our strategic vision by December 2026.	X	X		
4.1.2 Objective 4.1.2: Establish and carry out at least three new collaborations per year with local and regional partners that directly support strategic plan activities.		X	X	X
4.2 Goal 4.2: Strengthen national strategic partnerships by creating a framework to engage cultural institutions, universities, and heritage networks that elevate the Evans Home's visibility and amplify its national impact.		X	X	X
4.2.1 Objective 4.2.1: Develop and formalize relationships with at least five national organizations that can advance shared research, exhibitions, or educational initiatives by December 2027.		X	X	
4.2.2 Objective 4.2.2: Secure participation in at least one national networks, conferences, or collaborative projects per year that extend the reach of our mission beyond the local level.		X	X	X

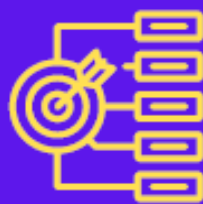
WILSON BRUCE EVANS HOME HISTORICAL SOCIETY



**2025 - 2028
STRATEGIC GOALS
AND OBJECTIVES**

5	LEAD: Advancing Leadership & Governance	2025	2026	2027	2028
5.1	Goal 5.1: Redesign board and governance practices to be more strategic, time-efficient, and focused on long-term impact and organizational oversight.	X	X	X	X
5.1.1	Objective 5.1.1: Participate in a Board Workshop to strengthen understanding of foundational governance structures, engage board members more effectively, and enhance overall board effectiveness through annual training that supports the organization’s strategy.	X	X	X	X
5.1.2	Objective 5.1.2: Establish and implement a new governance structure and plan that aligns with and supports the strategic plan by the 3rd quarter 2026.	X	X		
5.2	Goal 5.2: Develop and implement an executive leadership succession plan to ensure organizational continuity and stable leadership.	X	X		
5.2.1	Objective 5.2.1: Complete and adopt a written succession plan that includes the hiring of an Executive Director by 2026.	X	X		

WILSON BRUCE EVANS HOME HISTORICAL SOCIETY



**2025 - 2028
STRATEGIC GOALS
AND OBJECTIVES**

6 SUSTAIN: Ensuring Long-Term Sustainability	2025	2026	2027	2028
6.1 Goal 6.1: Develop and implement a multi-year diversified funding plan that increases individual and corporate donors, institutional philanthropy, unrestricted grants and earned income.	X	X	X	X
6.1.1 Objective 6.1.1: Increase individual giving by securing measurable growth in monetary donations, resources, and in-kind contributions.	X	X	X	X
6.1.2 Objective 6.1.2: Develop a comprehensive fundraising and fund development plan that defines short- and long-term goals to sustain and advance the strategic plan.	X	X	X	X
6.1.3 Objective 6.1.3: Identify and launch at least two revenue-generating programs or services (e.g., admission tickets, paid experiences, partnerships) by the end of 2026.		X		
6.1.4 Objective 6.1.4: Develop and launch a new membership structure, supported by a targeted marketing plan, by December 2026.	X	X		

EXECUTE AND MANAGE THE STRATEGIC ACTIONS

Growth & Funding plan

The Growth & Funding plan is an essential component in the execution of the strategic plan. It outlines the financial resources required to achieve the goals, objectives, and growth strategies that you outlined in your plan. The plan will help you to prioritize and ensure that your strategic plan is realistic and achievable by identifying the resources required to implement the plan. Annually you should identify and actively pursue resources for funding the plan using the fundraising recommendations provided in your assessment. Your funding plan will help you determine if you have the financial resources to sustain your operations and programs over the long term.

The site’s 4-Year Strategic Growth & Funding Needs Plan outlines a comprehensive investment of \$3,157,900 from 2025 to 2028 to restore, activate, and sustain the site’s mission. This phased approach prioritizes restoration of the historic home and grounds (\$2.43M), development of educational programming (\$46.5K), expansion of community engagement (\$67.5K), cultivation of national partnerships (\$79K), strengthening of leadership and governance (\$525.8K), and long-term sustainability efforts (\$19.5K). Funding will support construction, exhibit design, staffing, program development, and infrastructure to ensure the site becomes a vibrant, community-rooted hub for historical education, cultural engagement, and collaborative leadership. Each investment aligns with strategic goals and positions the Evans Home to thrive as a national model of preservation, equity, and public history.

WILSON BRUCE EVANS HHS 4-YEAR STRATEGIC GROWTH & FUNDING NEEDS PLAN							
Program Type			2025	2026	2027	2028	TOTAL
TOTAL	TOTAL STRATEGIC PLAN AND GROWTH FUNDING		\$ 375,000	\$ 1,860,700	\$ 618,600	\$ 303,600	\$ 3,157,900
RESTORE: RESTORING A LEGACY							
Funding Needs	Detail	Goal/Obj Alignment	2025	2026	2027	2028	TOTAL
NPS Approvals & architectural plans	archeology, architectural & historic consultant fees, design submission, permitting; Phase 2 starts construction Jan 2026.	1.1.1	\$ 120,000	\$ 75,000	\$ 25,000	\$ 25,000	\$ 245,000
Construction			\$ 250,000	\$ 1,000,000	\$ 250,000		
Exhibit Design and Construction				\$ 150,000			
RFP Preparation & Stakeholder engagement	Legal, admin, stakeholder collaboration	1.1.1	\$ 5,000	\$ 5,000	\$ 5,000		\$ 15,000
Functional Spaces for community use.	Exhibit & interpretation spaces; community gathering spaces; furniture fixtures and equipment. Major	1.1.1		\$ 250,000			\$ 250,000
Preliminary educational program design.	curriculum, planning workshops; 2028 Soft launch & activation; significant program design.	1.1.2		\$ 50,000	\$ 55,000		\$ 105,000
Project Management	insurance, contingencies.	1.2.1		\$ 20,000	\$ 20,000	\$ 20,000	\$ 60,000
Pre-Opening Enhancements	Pathways, crosswalk, signage	1.1.1		\$ 50,000			\$ 50,000
Volunteer & Staff Recruitment	Volunteers, interns, program support	1.2.1- 1.2.2			\$ 25,000	\$ 25,000	\$ 50,000
Total			\$ 375,000	\$ 1,600,000	\$ 380,000	\$ 70,000	\$ 2,425,000
EDUCATE: ILLUMINATING HISTORY THROUGH EDUCATIONAL EXCELLENCE							
Funding Needs	Detail	Goal/Obj Alignment	2025	2026	2027	2028	TOTAL
Program Review Process	Development of templates, timelines, and staff/consultant support to manage ongoing program approval.	2.1.1		\$ 5,000	\$ 2,500		\$ 7,500
New Program Planning	Resources to design and pilot educational programs for the next two years.	2.1.1		\$ 3,000		\$ 2,000	\$ 5,000
Community feedback mechanisms	surveys, focus groups, and facilitation costs to integrate participant input into program design.	2.1.2		\$ 6,000	\$ 3,000	\$ 2,500	\$ 11,500
Participant engagement reporting	data collection tools, evaluation software, and report production.	2.2.1		\$ 2,500	\$ 2,500	\$ 2,500	\$ 7,500
Program outcomes framework	consultant/staff time to establish standardized evaluation methods.	2.2.2		\$ 5,000			\$ 5,000
Ongoing assessment	Implementation of performance metrics, including training and systems to measure effectiveness.	2.2.2		\$ 5,000	\$ 2,500	\$ 2,500	\$ 10,000
Total			\$ -	\$ 26,500	\$ 10,500	\$ 9,500	\$ 46,500
ENGAGE: EXPANDING COMMUNITY VOICE & ENGAGEMENT							
Funding Needs	Detail	Goal/Obj Alignment	2025	2026	2027	2028	TOTAL
Engagement Analysis	consultant support, survey tools, and community input sessions to assess current strategies.	3.1.1		\$ 4,000			\$ 4,000
Comprehensive Engagement Strategy.	staff time, facilitation, and design of a new regional engagement framework.	3.1.2		\$ 5,000	\$ 5,000	\$ 5,000	\$ 15,000
Community Outreach Activities	events, forums, and partnerships to boost visibility and participation.	3.1.2		\$ 5,000	\$ 5,000	\$ 5,000	\$ 15,000
Marketing & Communications Plan	professional storytelling, graphic design, and visual media production.	3.2.1		\$ 4,000	\$ 4,000	\$ 4,000	\$ 12,000
Multi-channel Outreach/Consulting	Update website, social media, email campaigns, and print materials tailored to target audiences.	3.2.1		\$ 6,000	\$ 2,500	\$ 2,500	\$ 11,000
Ongoing Awareness Campaign	Advertising, media placements, and customized messaging for diverse audiences.	3.2.2		\$ 3,500	\$ 3,500	\$ 3,500	\$ 10,500
Total			\$ -	\$ 27,500	\$ 20,000	\$ 20,000	\$ 67,500

Communication Plan

The communication plan is essential in conveying strategic priorities, goals, success measures, and actions to stakeholders, including leadership, employees, persons served, donors, and the community. Proper communication of the strategic plan guarantees that everyone at Evans HHS is working towards the same objectives.

By following the plan, all members involved in the organization will be aware of the goals and success measures outlined in the strategy. This awareness will allow everyone to articulate their role in achieving the organization’s goals.

AUDIENCE	ACTION	TOOLS	HOW	LEAD
Board of Directors/ Executive Team	Share the Strategic Plan and all Supporting documents.	Strategic Plan; Growth Strategy; Strategic Plan 1- Pager	Board Meeting	Executive Director
Staff/Board Committees	Share Strategic Plan. High-level Documents	Strategic Plan document and graphic 1-Pager.	All Staff Meeting: Have a special meeting to launch and celebrate the conclusion of your strategic plan.	Executive Director
	Share with assigned individuals their expectations for goals and the plan.	Goals and Objectives and Action Items related to them and their committees.	Staff/Board Committee Meeting: Share specific goals with each assigned person.	Committee Chairs
Donors	Share the Strategic Plan and supporting documents	Share Strategic Planning Goals and Success Measures. Funding plan for funding meetings about plan. 1-pager.	Meetings with key donors to share plans.	Executive Director, Board members
Community	Share the launch of your strategic plan with the community 1-pager.	1 Page high-level document, PowerPoint	Social media, Email, share at all events.	Varies

Strategic Analysis and Performance Monitoring

The objectives of your strategic plan are to help Evans HHS achieve the goals outlined in the four-year plan. To ensure success, it is essential to monitor performance and continually analyze the plan. By following a targeted performance monitoring plan and schedule, you can identify areas where you are underperforming and act, as well as recognize where you are meeting your objectives and document your accomplishments.

It is recommended that you monitor the results of your strategic plan monthly, report results quarterly, and review and adjust the plan annually. The proposed revenue, expenses, and growth strategies serve as a guide, but it is important to re-evaluate them periodically as internal operations, and political, economic, social, and technological changes in the external environment can impact the strategic direction and priorities.

Performance feedback becomes an integral part of the strategic analysis of your organization's capabilities and resources. The leadership team can use this information to develop better strategies for success. Monitoring and evaluating the planning activities and status of implementation of the plan is just as important as identifying strategic issues and goals.

Effective performance management is crucial to your organization. Through formal and informal processes, it will help you align your employees, volunteers, resources, and systems to meet your strategic objectives.

Performance Monitoring Plan and Timeline

AUDIENCE	WHEN	ACTION	TOOLS	HOW	WHO
Board of Directors	April, July, October, January	Provide the board with a quarterly status of the strategic planning goals.	Quarterly Goal Reporting Form	Board Meeting	Executive Director
	Annually, February	Share strategic plan update and accomplishments with the board.	Annual Report (per your design)		
Committee Chairs/ Executive Team	Monthly	Review the status of the Strategic Planning Goals and Success Measures	Status of Goals, Success Measures, Action Items	Monthly Meeting	Each Committee Chair/Executive Team Member as Assigned
	Quarterly	Review Performance of Growth Strategies	Growth Strategy Reporting Form	Meeting	Executive Director
	June, December	Review the Mission Impact and Financial Viability of each program every six months	Funding Viability and Service Assessment	Bi-Annual Meeting	Each Committee Chair/Executive Team Member as Assigned
Managers	Quarterly	Provide quarterly updates on Goals and Action Items and	Detail Goal Report; Growth Strategy Status Report	Quarterly Meeting	TBD

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		Growth Strategy			
All Staff	Quarterly	Status on team specific goals	Detail Goal Report; Growth Strategy Status Report	All Staff	Manager
Community Stakeholders. Donors	Annually, January/February	Create a one-pager to share the results annually of your strategic plan	Annual accomplishments and strategic plans for the next year	Social media, fundraisers, meetings, Annual Report	Communications Committee

STRATEGIC PLANNING IMPLEMENTATION CALENDAR

The following represents the annual activities that your organization should participate in to ensure ongoing monitoring and success of your plan. Use the tools provided in your communication plan to assist with monitoring and reporting.

MONTH/YEAR	IMPLEMENTATION ACTION
October 2025	<ul style="list-style-type: none"> • Launch the Strategic Plan per communication plan. • Select goals to monitor and implement for 2025/2026. • Complete all action items and assign leads and board members to goals. • Start collecting monthly data related to growth strategies and funding plans.
November 2025	<ul style="list-style-type: none"> • Report monthly progress on success measures and action items on the detail reports.
December 2025	<ul style="list-style-type: none"> • Complete the first quarter report and share it with the board and leadership. • Develop action plans for success measures or growth strategies that are not achieved. • Report monthly progress on success measures and action items.
January 2026	<ul style="list-style-type: none"> • Report monthly progress on success measures and action items.
February 2026	<ul style="list-style-type: none"> • Report monthly progress on success measures and action items. • Review funding viability and mission impact for each program.
March 2026	<ul style="list-style-type: none"> • Complete the second-quarter report and share it with the board and leadership. • Develop action plans for success measures or growth strategies that are not achieved. Document accomplishments. • Report monthly progress on success measures and action items.
April 2026	<ul style="list-style-type: none"> • Report monthly progress on success measures and action items.
May 2026	<ul style="list-style-type: none"> • Report monthly progress on success measures and action items.
June 2026	<ul style="list-style-type: none"> • Complete the third quarter report and share it with the board and leadership. • Develop action plans for success measures or growth strategies that are not achieved. Document accomplishments. • Report monthly progress on success measures and action items.
July 2026	<ul style="list-style-type: none"> • Facilitate a retreat/meeting to review the strategic plan and determine goals for 2027. Involve all levels of the organization. • Report monthly progress on success measures and action items. • Begin discussion of the Annual Report for Strategic Plan and start to gather accomplishments from board members. • Re-score your sustainability assessment to record progress towards your desired goal. • Review your Organizational Capacity Assessment and record any progress or success. Note areas you will focus on in 2027.

MONTH/YEAR	IMPLEMENTATION ACTION
August 2026	<ul style="list-style-type: none">• Report monthly progress on success measures and action items.• Complete gathering of accomplishments from board members.• Share goals for 2027 with the Board of Directors for approval.• Review funding viability and mission impact for each program.
September 2026	<ul style="list-style-type: none">• Assign leads and supports.• Complete and share a formal annual report of 2025 goals success measures, and accomplishments.

This strategic plan was prepared by:



Rosa Consulting combines over 30 years of experience with a passion for supporting non-profits that serve underserved populations, especially those in urban communities. Our consulting services are aimed at providing valuable insight to help non-profits turn visions into reality.

Our data-driven insights, strategic tools, community engagement approaches, and clear action plans empower organizations, helping them implement strategies that produce long-term results that support our communities.

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