



Wilton House Museum

Strategic Plan

2017 - 2022

Welcome

Welcome to the Wilton House Museum's Strategic Plan. This document builds on the achievements made possible by the 2009 – 2016 Strategic Plan for The National Society of The Colonial Dames of America in the Commonwealth of Virginia (NSCDA-VA). For almost a century the NSCDA-VA have been the stewards of Wilton House Museum. Recognizing the need to invite and engage others to invest in the stewardship of the museum guided the creation of this Wilton House Museum Strategic Plan.

The Strategic Plan is structured around three strategic Goals of better *understanding*, *sharing*, and *caring for* Wilton House Museum. Inspired by the desire to engage the community and broaden audiences, this plan was crafted to direct the organization to accomplish these three strategic goals through measurable strategies over the next five years. Advancing these Goals are five Focus Areas given highest priority due to their transformative potential: interpretation and curatorial; preservation and collection management; staffing and governance; finance and development; education and communication; and accessibility. A supporting Appendix guides implementation.

Thank you to the numerous individuals who contributed to the creation of this plan. The efforts of the Strategic Planning committee were strengthened by discussion with six stakeholder roundtables, an open house charrette, museum leaders both locally and across the country, peer reviewers from The American Alliance of Museums, consultants from *Floriscane* as well as the review and endorsement of the plan by the Wilton House Museum Board and the NSCDA-VA's Board of Managers.

We trust that you may find your own interests in Wilton House Museum's future reflected in elements of this plan. Its implementation will require the dedication of the entire organization. With the commitment of our employees and membership, boards and committees, volunteers and donors, we can look to the future of Wilton House Museum with renewed focus.

Sincerely,

The Strategic Planning Committee:

Dr. Susie J. Rawles, *Wilton House Museum Strategic Planning Committee Chairman*
Molly Carey, Betsy Boswell, Nancy Holcomb, Betty C. Leviner, Elizabeth Lowsley-William,
Brenda Parker, Laura Towers, Keith D. MacKay, Andrew Lunney, and William Strollo

Mission

To increase public understanding of life in Virginia since the 18th century, the paradox of hardship amid elegance, and how the past continues to shape life in America today.

Our Values

- We are committed to the preservation of Wilton House Museum, and we are dedicated to maintaining the highest standards of professional and ethical museum practices and imparting the most current historical scholarship.
- We are dedicated to educating the public about the relevance of history to today.
- We value the study and teaching of history.
- We use the house and its collections to explore relevant cultural issues.
- We strive to be a recognized educational and cultural resource for the citizens of the Commonwealth of Virginia and beyond.
- We are committed to creating educational experiences that are inclusive of diverse audiences and perspectives.
- We demonstrate a commitment to operational and environmental sustainability.
- We emphasize service and value the importance of a positive visitor experience.
- We pursue compatible collaborations and partnerships.

Introduction

The Wilton House Museum Strategic Plan builds upon the findings of an *Historic Paint Analysis* by Dr. Susan Buck (2013), a *Think Tank* sponsored by the Chipstone Foundation (2014), a grant funded *Historic Structures Report* by Mark Wenger (2015), and the process of securing *Museum Reaccreditation* by the American Alliance of Museums (2016).

The creation of the Strategic Plan took place over 18 months and included input of board members, museum employees, consultants, stakeholders, and the public. In December 2013 Brenda Powers Parker, Museum Board Chairman, announced the appointment of an Ad Hoc Interpretation Committee composed of museum board members and employees. This committee played an active role in guiding the above achievements.

Recognizing that achieving a new interpretation and institutional identity would require strengthening all areas of the museum's work, the committee agreed to become the Strategic Planning Committee. A museum centered strategic plan fulfills an important goal identified in the NSCDA-VA's Strategic Plan. A reconsideration of the current interpretation and related museum programming is the central objective of this Strategic Plan.

Crafting this plan began with a series of six meetings by the committee and concluded with a comprehensive draft Strategic Plan. We presented this plan to the entire museum staff, the Wilton House Museum Board, and the NSCDA-VA's Board of Managers for their recommendations and considerations.

The second phase focused on expanding the document by engaging the museum's audiences and communities to evaluate the stated goals and strategies. In order to do this most successfully Executive Director Keith D. MacKay hired the Richmond-based consultancy *Floriscane* to conduct a Community Engagement Initiative. This effort was supported by a grant from the

Jessie Ball duPont Fund, and by the NSCDA-VA's Mary K. Hubbard Fund. During spring 2017 consultants John Sarvay and Lesley Bruno conducted six stakeholder roundtables with current audiences: neighbors; scholars and educators; museum peers; donors and foundations; members of the NSCDA-VA; and attendees of museum programs. This effort concluded with an open house charrette for the public to provide feedback.

Working alongside the consultants and reviewing the feedback and findings of the community refined the organization's vision for the museum. The Strategic Plan was refined to make clearer this vision and better define priorities to ensure the best investment and allocation of resources in areas of key importance to our mission, stewardship, and future.

Strategic Goals 2017-2022

Three strategic goals form the foundation of all initiatives for Wilton House Museum over the next five years as we implement the Strategic Plan. Central to all efforts is the stewardship of the collection and engaging a broader audience. These goals are deepening our *understanding* of Wilton as an historic structure and its history; the *sharing* of what we learn in ways accessible and mission-based; and the *caring* for the house, collections, and grounds. Supporting these goals is a commitment to sustaining and strengthening our ability to be good stewards.

Goal #1: To Better Understand Wilton

Focus – Interpretation and Curatorial

Explore and expand the interpretation of the historic house by activating its collections through an interpretation plan considering the three periods of historic significance identified in the Historic Structures Report. The Building of Wilton (1753 – 1859), The Selling of Wilton (1860 – 1932), the Imagining of Wilton (1933 – 1958). This approach allows for the incorporation of broader exploration of economic and social change over time. This new interpretive plan will guide future collecting and conservation goals, room interpretation, exhibitions and programming.

Strategy 1: Complete an Interpretation Plan

Engage a professional consultant to complete an Interpretation Plan that reflects new research and incorporates the three chronologies identified above.

Strategy 2: Complete a Furnishings Plan

Engage a professional consultant to complete a Furnishings Plan to support the Interpretation Plan. The plan should include specific recommendations for required conservation, acquisition, and de-accessioning of collection items following all Collections Management Policies.

Strategy 3: Create a Multi-Year Exhibition Calendar

Compose an exhibition vision statement in-line with mission and new interpretation plan. Establish a multi-year exhibition calendar that supports the Interpretation Plan, engages a diverse audience, and allows for more efficient promotion and funding.

Goal #2: To Better Care for Wilton

Focus – Preservation and Collections Management

Sustain best practices in museum stewardship by proactively preserving the integrity of the historic structure, as well as its supporting systems and infrastructure, through monitored plans and long range

budgeting. We remain committed to maintaining best practices in caring for the collections and incorporating the grounds within the visitor experience.

Strategy 4: Preserve and Maintain Wilton

Maintain accurate and comprehensive plans, policies, and long range budgets regarding the on-going care of the historic structure and support systems. Committed to on-going investigation and documentation of the historic house and its history to guide any future renovations of the interior or exterior.

Strategy 5: Preserve and Maintain the Collections

Regularly update, implement, and revise supporting plans and policies and allocate the appropriate funding for collection needs.

Strategy 6: Complete a Master Site Plan

Commission a Master Site Plan focused on site wide accessibility, the incorporation of the grounds in site interpretation, and the overall visitor experience. Plan must consider the most efficient allocation of office and support space.

Focus – Governance and Staffing

Strengthen museum board, employees, and volunteers to ensure all have the capacity and support to successfully implement this plan and the mission. Expanding diversity in each of these areas is essential in order to engage broad audiences.

Strategy 7: Board Recruitment

Revise the Museum Board Governance Structure to allow for more than two community volunteers. Compose new board job description to emphasize the board members role in cultivating support for the museum and the securing of major gifts. The selection of board members will be based on identified board skills needed for the next five years.

Strategy 8: Support and Sustain a Professional, Qualified, and Talented Staff

Develop a plan and proposed budget to expand and realign staff roles and responsibilities, and to develop a revised organizational structure to fully realize the changes identified in this Strategic Plan. This process will include a review of salaries and benefits (including professional development opportunities), and appropriate revisions to the Personnel Policy.

Strategy 9: Develop a Vibrant Tour Guide Program

Strengthen the museum docent program; identify opportunities to attract new volunteers; and develop a comprehensive onboarding and docent training program to strengthen the visitor's experience.

Focus – Finance and Development

Sustain and strengthen the stewardship of Wilton House Museum with a commitment to transparency and the creation of a long-range Development Plan to guide fundraising efforts and secure major gifts.

Strategy 10: Improve fiscal Oversight and Transparency

Organizational resources are appropriately aligned with the strategic plan with an operating budget that reflects the organization's values and mission. Consistent and accurate reporting on the various Donor Restricted Funds, Board Restricted Accounts, and on the overall financial health of the organization.

Strategy 11: Develop a Comprehensive Fundraising Plan

Identify the overall financial needs of Wilton House Museum, with particular emphasis on key elements in this strategic plan. Develop a multi-year plan to achieve identified fundraising goals, on-going maintenance, and restoration efforts. This plan should include the feasibility of a major gifts campaign to fund the Interpretative Plan implementation.

Goal #3: To Better Share Wilton

Focus – Education and Outreach

Invest in the visitor experience, create unique and engaging museum tours, provide programming and visitor experiences expressive of our mission and new interpretation. A commitment to providing educational experiences for people of all ages and the pursuit of compatible collaborations and partnerships.

Strategy 12: Develop Educational/Interpretative Tours and Programs

Develop educational/interpretative programs, tours, and visitor experiences guided by the museum’s collection, mission, and new interpretation plan. This effort must prioritize creating new guided tour experiences and related docent training.

Strategy 13: Improve and Increase Our Outreach and Communication Efforts

Create an overall communications plan to define the museum’s voice that will guide Wilton House Museum’s social media presence; print and online advertising; public relations efforts. Invest resources into communicating to stakeholders and communities committed to expanding and growing Wilton House Museum’s impact.

Focus – Accessibility

Expand accessibility to the site, programs, and collections both physically and cognitively as well as attracting broad and diverse audiences.

Strategy 14: Expand Physical and Cognitive Access

Develop a plan to increase access to the site, historical house, and programming that allows people of all abilities the opportunity to explore and experience Wilton. Develop digital and diverse cognitive opportunities to expand the ways and platforms people may access and experience Wilton and its collections.

Strategy 15: Diverse Offerings for a Diverse Community

Develop and maintain mission-based programming and an institutional presence that is inclusive of diverse audiences and perspectives.

Appendix

Institutional History, Timeline, and Implementation