

GENERAL LEW WALLACE STUDY AND MUSEUM
www.ben-hur.com

Strategic Plan

2009-2013



October 2008

Building on Success

In 2003, the museum staff and board embarked on an exciting five-year journey to revitalize the General Lew Wallace Study and Museum and position it as a vital community member. This journey was guided by an aggressive strategic plan that sunset in September 2008, with 100% of its goals met. The success of this plan was marked with the 2008 National Medal for Museum and Library Service, which was awarded by First Lady Laura Bush in the White House on October 7, 2008.

The next five years will build on our high standard of excellence established through innovative programs and events like the Lew Wallace Youth Academy, the Historic Preservation Workshop Series, Annual Theme Exhibit and Programs, and the Taste of Montgomery County. It is equally critical to consider the small museum environment that this success was built in – the staff wear multiple “hats” and are regularly bound by budget constraints. As a result, the objectives outlined in this plan are carefully measured for strength and feasibility.

Heading into this process, the board and staff understood that the focus of the plan needed to rest on a three key objectives: restore the study structure, evolve into a self-sustaining organization, and become the “best small museum in the Midwest.” With these in mind, the plan was developed during a series of board retreats held July 19, August 16, and September 20, 2008. Facilitated by Herm Haffner of Total Solutions (Crawfordsville), the planning process included an in-depth examination of the organization’s core competencies, mission, vision, and charge. With consensus in place, Haffner led the group through discussions regarding assumptions, budget, and human resources. Strategic planning activities included internal and external situation analyses, consideration of weaknesses and problems, comparative analysis of organizational peers, threat analysis, consideration of advantages and opportunities, and finally, establishing objectives.

Surrounding these retreats, the museum director met with city officials and shared the museum’s progress and plans for the future. In addition, the core competencies were presented and extremely positive conversations developed. To further buttress our ideas, an electronic survey was administered to several community stakeholders and members of the museum community. The results of this survey were considered as the final draft of this plan was prepared.

The progress of the museum’s strategic plan will be monitored every six months by the executive committee and board of trustees, either during

committee meetings or board meetings. Adjustments to the plan will be considered and heavily vetted by the board and staff, making the plan a living document. The plan is nimble enough to react to internal and external opportunities while keeping the objectives on course.

Participants

We are grateful to the following individuals for their imagination and dedication to the General Lew Wallace Study and Museum as citizens and scholars of the Wallace legacy. It is through their dedication that this plan was conceived.

Roger C. Adams

Board Member

Rusty Carter

Board Vice President

Cinnamon Catlin-Legutko

Museum Director

Kara Edie

Visitor Services &
Marketing Coordinator

Tom Fuhrman

Board Treasurer

Herm Haffner

Facilitator, Total Solutions

Johanna Herring

Board Member

Dennis J. Hohlbein

Board Member

Helen Hudson

Board Member

Deb King

Grounds Manager

David Maharry

Board Secretary

Suanne Milligan

Board Member

Paul Moehling

Board Member

Dale Petrie

Board President

Beth Swift

Board Member

Amanda Wesselmann

Associate Director

John Wooten

Board Member

CORE COMPETENCIES

We know Lew and make him relevant
We are very good at articulating our mission
We have expertise in the small museum field
We are creative and innovative and we execute
We are obsessed with the visitor's experience
The historic site's integrity is at the heart of our existence

VISION

The General Lew Wallace Study and Museum is deeply committed to the protection and preservation of Lew Wallace's legacy for generations to come.

MISSION

The General Lew Wallace Study and Museum celebrates and renews belief in the power of the individual spirit to affect American history and culture.

OUR CHARGE

To be a key cultural asset for our community's continued well-being we will:

- Provide innovative cutting edge programs and operations
- Create individualized experiential learning
- Become financially self sustaining
- Provide continued stewardship of collections and historic structures
- Focus on activities that add value to the study and the community
- Serve as a model to the larger small museum community

Strategic Objectives

1. Achieve museum accreditation
 - Tactical Steps
 - a) Measure organizational distance from accreditation
 - b) Develop a comprehensive work plan to achieve accreditation

2. Complete study restoration
 - Tactical Steps
 - a) Launch capital campaign and grant writing efforts
 - b) Complete restoration

3. Develop and implement wayfinding plan
 - Tactical Steps
 - a) Design a wayfinding system
 - b) Design a banner and signage system for both gates and on grounds

4. Secure financial stability
 - Tactical Steps
 - a) Create an endowment
 - b) Conduct a feasibility study
 - c) Launch an endowment campaign

5. Develop local awareness about the museum
 - Tactical Steps
 - a) Revise marketing plan
 - b) Connect with new and strategic audiences
 - c) Educate Crawfordsville/Montgomery County workforce and leadership

6. Ensure preservation of collections
 - Tactical Steps
 - a) Secure intellectual control of collections
 - b) Create work plan from CAP and MAP recommendations
 - c) Stabilize collections on exhibit and in storage

7. Develop site interpretation
 - Tactical Steps
 - a) Develop an interpretive plan
 - b) Design and install exhibit text for study interior
 - c) Create a consistent training regimen for tour staff and volunteers

8. Create innovative educational programming
 - Tactical Steps
 - a) Revise educational plan (all ages)
 - b) Develop scholarly programs for adult audiences
 - c) Benchmark programs and implement a comprehensive evaluation program

9. Advocate for the museum
 - Tactical Steps
 - a) Develop relationships with elected officials
 - b) Engage with the museum service providers as they advocate for American museums

10. Competitive compensation for staff and succession planning
 - Tactical Steps
 - a) Evaluate staff pay scale and conduct market analysis
 - b) Budget for graduated compensation increases
 - c) Develop succession plan for all staff and volunteer positions

Work Plans

The museum staff worked collaboratively to develop action plans for implementing the plan's strategic objectives. **Tactical Step** refers to the goals that are comprised within the objective, while **Project** breaks the goal down into a manageable piece to be measured. **Time Lines** are assigned generally at the outset but will be refined each year as the plan is reviewed. Lead staff are identified under **Resource** as well as outside contractors, consultant, and interns. As a team work environment, all of the staff is touched at some point by each project, but the primary resources involved are only listed. The **Direct Cost** refers to consulting and contractor fees, procurement, and staff salaries. All numbers are estimates and will be refined before each project kick-off. Lastly, the **Outcome Measurement** describes the tangible (and sometimes intangible) result of the project which ultimately ensures the museum's strategic direction.

KEY: CCL = Cinnamon Catlin-Legutko (Museum Director); AW = Amanda Wesselmann (Associate Director); KE = Kara Edie (Visitor Services and Marketing Coordinator); DK = Deb King (Grounds Manager); Board = Lew Wallace Study Preservation Society Board of Trustees; Museum Team = all staff and designated volunteers; EAC = Education Advisory Committee

1. Strategic Objective: Achieve museum accreditation

TACTICAL STEP	PROJECT	TIME LINE	RESOURCE	DIRECT COST	OUTCOME MEASUREMENT
Measure organizational distance from accreditation	Review and annotate IUPUI student project paper/share with board	Jan 2010	CCL	staff time = \$250	Preliminary report
	Review published resources on accreditation	Feb 2010	CCL	\$250 (procure books); staff time = \$250	Knowledge
	Organize MAP & CAP recommendations into a matrix	June 2010	CCL	staff time = \$750	Planning matrix
Develop a comprehensive work plan to achieve accreditation	Develop a formal chart for monitoring accreditation activities	Aug 2010	CCL	staff time = \$750	Formal chart
	Prepare long-range budget for major projects (this will determine whether accreditation can be achieved by 2013)	Oct 2010	CCL	TBD (\$1,000-\$50,000)	Long-range budget projections

2. Strategic Objective: Complete study restoration

TACTICAL STEP	PROJECT	TIME LINE	RESOURCE	DIRECT COST	OUTCOME MEASUREMENT
Launch capital campaign and grant writing efforts	Identify a funding strategy	late 2008*	CCL	staff time = \$250	Formal document
	Identify likely grantmakers and prepare schedule	late 2008	CCL	staff time = \$250	Schedule
	Write and submit grant applications	late 2008-spring 2009	CCL	staff time = \$2,250	Grant awards
	Initiate direct mailing campaign	April 2009	CCL	staff time = \$250; \$250 mailing costs	\$5,000 for restoration project
Complete restoration	Prepare bidding documents and oversee project	June 2009	Ratio Architects	\$8,500 in architect's fees; staff time = \$2,000	Bidding documents
	Execute restoration work	Summer 2009	Contractor	\$165,000	Study restored; water infiltration arrested

*Due to grant application deadlines, this work began in 2008, preceding the plan's official start date of January 1, 2009.

3. Strategic Objective: Develop and implement wayfinding plan

TACTICAL STEP	PROJECT	TIME LINE	RESOURCE	DIRECT COST	OUTCOME MEASUREMENT
Design a wayfinding system	Identify additional locations and content for signage	Fall 2009	DK and CCL	staff time = \$200	Preliminary report
	Research state and local regulations regarding signage	Fall 2009	DK	staff time = \$200	Preliminary report
	Identify manufacturers of needed signs and gather designs and estimates	Summer 2010	DK	staff time = \$400	Information gathered for budget
	Install signage	Fall 2011	Street Dept. and specified vendors	TBD (\$5,000-\$30,000)	Project completion
Design a banner and signage system for both gates and on grounds	Identify permanent and temporary event locations	Fall 2009	DK and CCL	staff time = \$200	Master plan for consistent signage
	Develop content	Spring 2010	DK	staff time = \$500	Copy and images for manufacturer
	Signage manufacture, in-house and other	Fall 2010	DK and vendors	TBD (\$1,000-\$5,000)	Project Completion

4. Strategic Objective: Secure financial stability

TACTICAL STEP	PROJECT	TIME LINE	RESOURCE	DIRECT COST	OUTCOME MEASUREMENT
Create an endowment	Develop policy to govern investments	Nov 08*	Ad hoc board committee; CCL	staff time - \$250	Policy
	Select investment mechanism and create endowment	Dec 08	Ad hoc board committee	\$0	Money invested
Conduct a feasibility study	Select a consultant	Feb 09	CCL	staff time = \$150	Consultant matched to our needs
	Conduct feasibility study	Spring 2009	Consultant	\$6,000	Accurate assessment of what can be raised in a campaign; ensures good use of resources and effective strategy
Launch an endowment campaign	Select a consultant	Summer 2009	CCL	staff time = \$150	Consultant matched to our needs
	Launch endowment campaign	Oct 2009	Consultant, CCL, board	Consultant and staff time = \$5,000-\$10,000 per year; printing \$2500-5000	Effective campaign
	Conclude endowment campaign	Dec 2012	Museum team and board	\$30,000 total spent	Endowment raised (neighborhood of \$1M)

*This deadline is before the start of the plan because we have funds earmarked for investment that need to be secured by year end 2008.

5. Strategic Objective: Develop local awareness about the museum

TACTICAL STEP	PROJECT	TIME LINE	RESOURCE	DIRECT COST	OUTCOME MEASUREMENT
Revise marketing plan	Initiate marketing plan analysis among staff and board	Nov-Dec 2008	KE	staff time = \$150	Detailed measurement of 2005-08 marketing plan's effectiveness
	New marketing plan for 2009-12	Dec 2008-Feb 2009	KE	staff time = \$500	Complete 3-4 year marketing plan with strategic goals and tasks to reach goals
Connect with new and strategic audiences	Market development: define all desired audiences	Oct-Nov 2008	KE	staff time = \$150	Specific groups defined to target marketing
	Create outcome-based evaluation on new audience penetration	Oct 2008-Jan 2009	KE	staff time = \$500	Measurable results of marketing plan's effectiveness with new audiences
Educate Crawfordsville & Montgomery County workforce and leadership	Partnership with Montgomery County Leadership Academy	Early 2009	CCL	staff time = \$250	Local leadership contacts made
	With partner museums, secure a regular column in local newspapers and a regular weekly guest spot on WCVL's "Community Focus"	Jan – June 2009	KE	staff time = \$150	Expanded local exposure
	Expand newsletter saturation: waiting rooms, break/lunch rooms, one copy to recent visitors	Feb-May 2009	KE	staff time = \$150; mailing and printing costs = \$500/yr	Expanded local exposure
	Meet and greet stakeholders, i.e. innkeepers, retailers, etc.	Fall 2009 – Fall 2010	KE	staff time = \$500	Community participation

6. Strategic Objective: Ensure preservation of collections

TACTICAL STEP	PROJECT	TIME LINE	RESOURCE	DIRECT COST	OUTCOME MEASUREMENT
Secure intellectual control of collections	Finish reconciliation of collection records	Aug 2009	Intern	staff time = \$250; intern = \$0-\$2,500	Records are current
	Records in Past Perfect match locations in storage and on exhibit	Aug 2009	Intern	staff time = \$250; intern = \$0-\$2,500	Records are accessible and objects are retrievable
Create work plan from CAP and MAP recommendations	Complete MAP Collections Management Peer Review	Spring 2009	CCL and reviewer	\$1,000 (grant funded already)	Report with recommendations
	Integrate recommendations into collections plan and manual; conservation plan	Fall 2009- Fall 2010	CCL	staff time = \$500	Appropriate plans in place; collections safeguarded
Stabilize collections on exhibit and in storage	Finish re-housing oversized items in storage	Spring 2009	CCL or intern	staff time = \$500; intern = \$0-\$1,000	Oversized objects stabilized
	Remove artifacts from display in study; decide which pieces may remain or need re-mounting or replication	Winter 2009-2010	CCL and AW	Staff time = \$2000	Collections safeguarded

7. Strategic Objective: Develop site interpretation

TACTICAL STEP	PROJECT	TIME LINE	RESOURCE	DIRECT COST	OUTCOME MEASUREMENT
Develop an interpretive plan	Decide comprehensive direction for interpretation of interior, exterior, and grounds	Spring 2010	AW and museum team	staff time = \$2000	Outline of interpretation for each of these aspects
	Draft written interpretive plan including tasks and timelines	Fall 2010	AW	Staff time = \$1000	Formal plan
Design and install exhibit text and artifact mounts for study interior	Write and design labels for study interior	Fall 2010	AW	Staff time = \$2,500	Digital files print ready
	Secure bids and select print vendor	Jan – Feb 2011	AW and vendor	TBD (depending on number and size of labels)	Vendor selected
	Build mounts and have custom mounts built	Jan-Feb 2011	AW, CCL and vendor	staff time = \$1000; vendor fees = \$500-\$2500	Properly mounted artifacts
	Install panels	April 2011	AW, CCL, DK	staff time = \$1000; \$250-\$1000 for mounting hardware/fixtures	Exhibit installed
Create a consistent training regimen for tour staff and volunteers	Identify needs for staff and volunteers to increase training and knowledge	Dec-Jan of each plan year	AW	staff time = \$250	List of points to address
	Create materials for staff and volunteers	Jan-Feb of each plan year	AW	Staff time = \$500	Training materials to share
	Offer training days for staff and volunteers	Jan-Mar of each plan year	AW	Staff time = \$1000; \$75 for snacks and materials	Consistent information and strategies for front line staff and volunteers

8. Strategic Objective: Create innovative educational programming

TACTICAL STEP	PROJECT	TIME LINE	RESOURCE	DIRECT COST	OUTCOME MEASUREMENT
Revise educational plan (all ages)	Examine educational plan and note successes and needs for improvement	Fall 2010	AW and Education Advisory Committee (EAC)	staff time = \$250	Baseline for new plan
	Write the next 5-year plan and tasks to accomplish them	Spring 2011	AW and EAC	staff time = \$500	New formal plan for 2012-17
Develop scholarly programs for adult audiences	Consult the Education Plan	Ongoing	AW and EAC	staff time = \$250	Direction for program development
	Hire an Education Assistant	2010	CCL	\$12,000-\$15,000 per year	Quality new programming balanced with the current workload
Benchmark programs and implement a comprehensive evaluation program	Create a graph of previous visitation and evaluation results for program	Jan 2009	AW	staff time = \$500	Graph to use as basis for future projections
	Research benchmarks and evaluation to decide on appropriate measures for types of programs	Jan – June 2009	AW	staff time = \$750	Evaluation program
	Create evaluations that measure benchmarks for programs	Fall 2009	AW	staff time = \$500; \$500-\$1000 (cost of administering evaluations)	Evaluative data

9. Strategic Objective: Advocate for the museum

TACTICAL STEP	PROJECT	TIME LINE	RESOURCE	DIRECT COST	OUTCOME MEASUREMENT
Develop relationships with elected officials	Visit members of Congress	February 2009	CCL and board	staff time = \$1000; \$500-\$1,000 for annual travel	Initial contact made
	Visit state and local officials	Spring – Summer 2009	CCL and board	staff time = \$1000	Initial contact made
	Develop communication plan for keeping officials informed and connected with museum	Fall 2009	CCL	staff time = \$500	Communication channels open
Engage with museum service providers as they advocate for American museums	Keep tabs on nationwide efforts, i.e. Formula Funding Grant Program, AAM Strategies, etc. and engage when necessary	Ongoing	CCL	staff time = \$250	Awareness and ability to comment on issues when necessary
	Gain grassroots training	2010	CCL	staff time = \$500; \$1,000 seminars	Knowledge

10. Strategic Objective: Competitive compensation for staff and succession planning

TACTICAL STEP	PROJECT	TIME LINE	RESOURCE	DIRECT COST	OUTCOME MEASUREMENT
Evaluate staff pay scale and conduct market analysis	Consider wages and review published museum compensation reports	Fall 2009	CCL and board	staff time = \$250	Recommendation for GLWSM wage scale
Budget for graduated compensation increases	Evaluate budget and phase in new wage scale	Fall 2009	CCL and board	staff time = \$250	Long-range budget strategy
Develop succession plan for all staff and volunteer positions	Evaluate staffing structure	Spring 2010	CCL	staff time = \$500	Formal plan

Appendix

Stakeholder Survey
 Supplemental Information
 Accreditation report 2008
 Restoration plans
 Signage update
 Fundraising plan 2003-2008
 Marketing plan 2005-2008
 CAP and MAP executive summaries
 Education plan 2006-2011
 AAM advocacy document
 Organizational history