
GENERAL LEW WALLACE
STUDY AND MUSEUM

STRATEGIC PLAN

September 2003



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Introduction

The strategic plan of the General Lew Wallace Study and Museum (“Museum”) was created with input from the Study’s advisory board and staff. This is the first strategic plan adopted by the organization during its long history as a city entity. The staff and board anticipate that this tool will be instrumental for the future development and financial stability of the Museum. As a National Historic Landmark, the Museum is significant to American history and will benefit from a strong governance body and structured managerial approach.

History of the Organization

General Lew Wallace's Study has always been a monument to his belief in life-long education and a reflection of his dreams. Typical of most of his endeavors, his self-taught knowledge of architecture gave him the tools to design the study himself, just as his readings in military tactics informed his actions as a Civil War officer and his study of grammar formed the foundation for his novels. In building his Study, he created the tranquil space to fulfill his wishes for his last years: to read, to think, but most of all, to write.

For 34 years after Lew Wallace's death (1905), the Wallace family maintained the Study and kept it open to the public. Of great interest to many visitors were the original manuscripts of *The Fair God*, *Ben-Hur*, and the *Prince of India*, as well as his Civil War memorabilia, his art, and his book collection. After the death of Lew Wallace grandson Lt. William Noble Wallace during World War I, the Study also collected items pertaining to the war and memorials to Lt. William Wallace.

As a private museum, the Study did not have regular hours or admissions fees. The first custodian, Walter Elliott, who maintained the building and grounds until his death in 1933, allowed visits at any hour of the day or night. A small booklet describing the items in the Study was available as a guide. Attendance increased in the late 1920s with the release of a silent film version of *Ben-Hur* in 1925 and the promotion of the Pikes Peak Ocean to Ocean Highway through Indianapolis.

After the death of the General's son, Henry Lane Wallace, in 1926, there were some legal disputes about ownership of the Study and its contents between the City of Crawfordsville and the General's surviving grandson, Lew Wallace, Jr. The Study remained open to the public during this time. In 1933, Horace F. Harvey became the custodian and curator until economic difficulties forced the Study to close its doors in 1939.

However, the Study was soon reopened through a gift from the board of the Community House for Women and Girls. This “women’s club” had recently sold their building so that a new post office could be built and was looking for a new home. Combining a sense of duty to preserve Wallace history and the possibility of remodeling the General’s carriage house as a new facility for the organization, the board purchased the Study and its grounds from Lew Wallace, Jr. for \$7,500. The property was then turned over to the City of Crawfordsville to be maintained as a “historic shrine” to Lew Wallace. The site was governed by a seven member board made up of three members of the Community House, three from the city administration, and the president of the Montgomery County Historical Society. The carriage house was remodeled and became the “Susan E. Wallace Little House.” Girl Scouts and later Campfire Girls used the house for meetings. In October of 1941, the Study reopened with Katherine Rowland as curator and with an admission fee of 25 cents for adults and 10 cents for children.

Visitation increased throughout the 1960s, launched by the 1959 movie version of *Ben-Hur*, starring Charlton Heston and Haya Harareet. Just a few months before the release of the film, the City of Crawfordsville proclaimed November 14, 1959, Ben-Hur Day, for the 79th anniversary of the publication of the novel. The event included multiple speakers, an essay contest for local students, a parade, and a viewing at the Study of the original Ben-Hur manuscript, on loan from the Lilly Rare Books Collection at Indiana University¹. With interest in *Ben-Hur* renewed, the Lew Wallace Study also became known as the Ben-Hur Museum. Additionally, in 1963, markers were placed on the grounds by the Indiana State Civil War Centennial Commission to honor Lew Wallace and by the Dorothy Q. Chapter of the DAR to honor David Wallace, sixth governor of Indiana and Lew Wallace’s father.

In 1976, the Study was placed on the National Register of Historic Places and, in 1977, it gained National Historic Landmark status. For the centennial celebration of the publication of *Ben-Hur* in 1980, many groups contributed to a two-week long series of lectures and events, including a chariot race, screening of the 1959 film, a symposium drawing national speakers, and a book

¹ Lew Wallace, Jr. sold the *Ben-Hur* and *The Fair God* manuscripts to Eli Lilly whose personal collection formed the foundation of the Lilly Rare Books Collection. The *Prince of India* manuscript is now housed in the Ramsey Archives at Wabash College.

signing of the recently released biography, *Lew Wallace: Militant Romantic*. A sizable collection of articles about Lew Wallace was published by the Journal Review, sponsored by local businesses.

The late 1980s and early 1990s saw promotion of the Study through an annual festival, first, the Circus Maximus, inspired by the Roman setting of *Ben-Hur*, and later, the Lew Wallace Civil War Days. In 1991, Lew Wallace's three living great grandchildren attended the celebration of 50 years of ownership by the City of Crawfordsville. The 1990s were also marked by Charlton Heston's visit to the Study in 1993 and the completion of various restoration and accessibility projects.

The future of the General Lew Wallace Study and Museum is exciting and full of new programming, preservation projects, and more. The museum board began strategic planning in July of 2003. The following document is the result of their efforts and will guide the future direction of the staff, board and volunteers. The document is essentially a five-year plan, with a dynamic action plan guiding daily efforts.

Curators of the General Lew Wallace Study (Ben-Hur Museum)

1900-1933	Walter Dorman Elliott
1933-1939	Horace Harvey
1941-1944	Katherine M. Baylis Rowland
1944-1946	Ethel S. McCulloch
1947-1957	Daisy Goodman
1958-1972	Inez Cunningham
1972-1977	Kathleen Patterson
1978	Edward Kucinski
1979-1980	Rita Weliver
1980-1982	Edward Kucinski
1983-1986	Mildred Moore
1987	Betty Rich
1988-2003	Joann Spragg
2003 – 2009	Cinnamon Catlin-Legutko

Vision Statement

The General Lew Wallace Study and Museum is a locally, nationally, and internationally significant historic site and educational resource that is deeply committed to the community and to the protection and preservation of Lew Wallace history for generations to come.

Mission Statement

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

Revised Spring 2005

General Lew Wallace Study & Museum Board of Trustees

Strategic Goals

Education

- ◆ Expand public knowledge of Lew Wallace history, the building and grounds
- ◆ Develop collaborations with local and state organizations, including area school systems
- ◆ Develop an active exhibits program

Preservation of Building and Grounds

- ◆ Preserve historic structures
- ◆ Interpret grounds according to historical records

Development

- ◆ Maintain realistic and effective annual budget
- ◆ Recruit volunteers with skills and interests necessary to meet the strategic goals of the Museum
- ◆ Promote community use of the grounds and regular visits to the Museum

Collections

- ◆ Improve collection storage and exhibit environment
- ◆ Align collection management procedures with American Association of Museums standards
- ◆ Create active loan and collecting program

Administration

- ◆ Establish museum identity
- ◆ Open Carriage House Interpretive Center to the public
- ◆ Establish board governance that is reflective of the strategic plan and enables its success

- ◆ Improve web presence
- ◆ Improve accessibility to the site
- ◆ Revise and create policy to guide museum administration

Evaluation

The strategic plan will be reviewed annually for efficacy. Through consensus of the board and staff, adjustments to the plan will be made as barriers are realized. Recommendations for adjustments shall be made in writing and submitted during regular board meetings.

After a period of one year from the approval date, suggestions will be solicited from community leaders, educators, and volunteers. The public review process will provide necessary feedback from the Museum's audience, which will encourage the board and staff to re-examine the plan for effectiveness. This public forum approach is usually considered during the initial development of the strategic planning process, however, this is the first of such plans for the organization. Currently, there is very little programming, development or active preservation taking place at the Museum. Previous efforts have focused on research and care taking. The goals introduced in the plan require a significant increase in resources, and the staff and board need time to adjust to the newly established goals to successfully participate in the solution.

Implementation Schedule

The five goal categories have been broken into a schedule for implementation with several elements: goal, solution, steps, responsibility, deadline and priority level. Names and groups designated in the “responsibility” category are subject to change. Where applicable, the first or only name listed is the lead person on the project. Other participants may be added at his/her discretion.

The priority levels supersede the deadline dates. For example, if a project has a deadline of Fall 2003 and a priority level 3, it will wait until appropriate resources are available and/or higher priority level projects are finished.

Task Lists

The Implementation Schedule has been organized into annual task lists. This will contribute to the timely completion of projects.

2003

Summer

- ◆ Recruit experts, teachers, and volunteers to help in developing a formal educational program
- ◆ Expand educational outreach to include off-site programs using objects as visuals
- ◆ Give formal presentations at social, hobby, professional, and other groups
- ◆ Collaborate with educational, recreational and tourism groups
- ◆ Expand grant solicitation at local, state and national levels
- ◆ Recruit volunteers through mailings
- ◆ Establish museum identity by changing name to General Lew Wallace Study and Museum
- ◆ Obtain improved signage

Fall

- ◆ Enhance student/youth visitation experience through structured programs
- ◆ Develop Strawberry Festival programming
- ◆ Collaborate with Visitor's Bureau – locals bring guests to “show off” Study
- ◆ Establish uses of Carriage House
- ◆ Place ironwork in storage
- ◆ Create Development Committee
- ◆ Target audiences relative to different aspects of Lew Wallace history
- ◆ Direct solicitation mailings
- ◆ Define Parks and Recreation budget to reflect actual spending at site
- ◆ Volunteer job descriptions and reach out to social, hobby, and professional groups

Winter

- ◆ Locate grant funding for web site and begin re-design efforts
- ◆ Discuss board re-structuring opportunities

- ◆ Set preservation priorities and create preservation plan for site
- ◆ Initiate NPS assessment for Study
- ◆ Seal Study foundation and porch
- ◆ Explore benefits of Society membership
- ◆ Informational mailings and meetings to position Study in the community
- ◆ Propose annual Society budget
- ◆ Develop Lew Wallace Festival concept
- ◆ Author and approve agreement with the City to recognize Society board as Study governance
- ◆ Revise Society by-laws and inform membership and public of board re-structure
- ◆ Identify appropriate number of board members and begin nominating process
- ◆ Initiate board term limits
- ◆ Identify appropriate committees and chairpersons, including nominating committee
- ◆ Develop acquisition budget
- ◆ Apply for CAP grant

2004

Spring

- ◆ Tie in with Hispanic community and other ethnic groups
- ◆ Develop incoming loan program
- ◆ Use technological tools for outreach, e.g. laptop, LCL projector
- ◆ Begin restoration of the Carriage House
- ◆ Annual membership drive
- ◆ Create planned giving materials and give to key individuals in the community
- ◆ Determine steps to increase annual visitation
- ◆ Develop sponsorships for projects, e.g. conservation of specific pieces

- ◆ Recruit volunteers through advertising
- ◆ Move collection off-site
- ◆ Develop collection policy and registration forms
- ◆ Develop loan policy
- ◆ Develop Ethics policy
- ◆ Determine hours for gates to be open extended hours and notify public
- ◆ Explore increasing visitation hours and allocate funding for labor

Summer

- ◆ Begin interpreting grounds with programming and signage
- ◆ Use docents in period dress

Fall

- ◆ Develop summer camps and year round workshops and programs
- ◆ Develop docent corps
- ◆ Develop curriculum for use in the classroom that reflect academic standards for Indiana
- ◆ Encourage multiple visits from different age groups
- ◆ Create driving tour of the county in collaboration with related historic sites
- ◆ Draft marketing plan to promote community use of the grounds and regular visits to the Museum
- ◆ Allocate rental fees for temporary off-site storage
- ◆ Formalize disaster preparedness plan and emergency procedures
- ◆ Formalize exhibit policy
- ◆ Author charters for Board of Trustees committees

Winter

- ◆ Use website for educational materials and virtual exhibits
- ◆ Explore Country Club connection and develop history of site and use their space for presentations, traveling exhibits, etc.
- ◆ Annual Society budget
- ◆ MAP II assessment
- ◆ Identify additional appropriate administrative policies

2005

Spring

- ◆ Complete Carriage House Interpretive Center
 - ◆ Re-locate non-period collection to Carriage House using appropriate storage furniture
 - ◆ Create a dedicated educational space in the Carriage House
 - ◆ Promote community use of the carriage house as a meeting space
 - ◆ Relocate gift shop, administration, and video presentation to Carriage House
- ◆ Restore Study to circa Lew Wallace
- ◆ Fix and seal basement (including walls and steel) in the Study
- ◆ Develop a master plan for the grounds including tree plan and replacement schedule
- ◆ Expand gift shop inventory

Summer

- ◆ Develop grounds by cultivating gardens circa Lew Wallace, developing outdoor exhibits, designating Old John's grave, and excavating moat and reflecting pool

Fall

- ◆ Develop an education collection through donation and acquisition for use in discovery kits
- ◆ Develop hands-on exhibits
- ◆ Expand exhibits by borrowing from locals and collectors
- ◆ Create an incoming loan program from other museums

Winter

- ◆ Allocate funds for acquisitions
- ◆ Establish fund with Montgomery County Community Foundation
- ◆ Determine annual goals for endowment
- ◆ Formalize collecting plan
- ◆ Formalize conservation plan

2006

Spring

- ◆ Develop scale model of grounds at the Carriage House for interpretation of site changes
- ◆ Repair and seal wall
- ◆ Commission ironwork restoration or replicas
- ◆ Commission clothing replicas
- ◆ Gain documented title to the collection following Indiana museum property law and utilizing registration forms with proper signatures
- ◆ Institute regular inventories of collection
- ◆ Formalize complete catalog of collection including photo-documentation

Summer

- ◆ Continue development of grounds by identifying pathways through gardens and effective signage for the arboretum

Fall

- ◆ Employ CD-ROM technology to create interactive preparation and follow-up for visits

Winter

- ◆ Establish a collections committee
- ◆ Formalize deaccession policy

2007

There are no formal tasks for this year, although it is the fifth year of the plan. The museum hired its first professional staff member in the spring 2003 and the majority of this plan includes new approaches and directions for the board and staff. With the limited staff time available (2 part time staff members), keeping 2007 open will allow for realistic timelines, if the extensions are needed. A new strategic plan should be developed in September of this year.

Action Plans

A template has been provided for the construction of Action Plans. Each responsible party is to draft the plan and delegate responsibilities where necessary. The table includes: solution, step, action steps, timeline to completion, responsible parties, costs, and outcome measurements.

As each plan is developed, the board is to be provided a copy for inclusion in their strategic planning binder. If a change is needed in the Implementation Schedule, the change should be defined in the form of an Action Plan and circulated as such.

ACTION PLAN TEMPLATE

STRATEGIC GOAL: _____

SOLUTION	STEP	ACTION STEPS	TIME LINE COMPLETE	RESPONSIBLE PARTIES	COSTS	OUTCOME MEASUREMENT

Total Direct Cost of Project: \$

Number

Approval Date

ADMINISTRATION

GOAL	SOLUTION	STEPS	RESPONSIBILITY	DEADLINE	PRIORITY LEVEL
Establish museum identity	Name change to <i>General Lew Wallace Study and Museum</i>	Notify Park Board	Dick Howell	7/8/2003	1
		Issue press release	Cinnamon Catlin-Legutko	by 7/30/03	
Open Carriage House Interpretive Center to the public	Complete Carriage House	Oversee project	Cinnamon Catlin-Legutko	Spring 2004	1
		Relocate gift shop, offices, storage and video presentation	Park employees, hired help	Spring 2005	
Establish board governance that is reflective of strategic plan and enables its success	MAP I Assessment	Apply for grant	Cinnamon Catlin-Legutko	12/1/2003	1
	Streamline board structure to include Park Board governance and Society governance	Propose new structure to Park Board	Board	Fall 2003	
		Author and approve an agreement with the City to recognize Society board as Study governance	City Attorney	Winter 2003	
		Inform public and members	Cinnamon Catlin-Legutko	Winter 2003	
		Revise by-laws	Board	Winter 2003	
		Initiate board term limits	Board	Winter 2003	
	Develop committees with board member as chair	Identify appropriate committees and chairs	Board	Winter 2003	
		Author charters for the committees	Committees, Cinnamon Catlin-Legutko	Fall 2004	
	Expand size of board to include diverse community members	Identify appropriate number of board members	Board	Winter 2003	
		Aggressive nominating process	Nominating committee	Winter 2003	
Improve Web presence	Contract web designer	Locate grant funding	Cinnamon Catlin-Legutko	Fall 2003	2
		Begin design conversations	Cinnamon Catlin-Legutko	Fall 2003	
		Write text	Shaun Lighty	Fall 2003	
		Locate funding for project	Cinnamon Catlin-Legutko	10/1/2003	
Improve accessibility to site	Commission signage	Begin design conversations with graphic designer	Cinnamon Catlin-Legutko, Cheryl Keim	Summer 2003	3
		Allocate funding for signage	Cheryl Keim	Summer 2003	
	Establish longer hours for gates to be open	Determine hours gates to be open	Board	Spring 2004	
		Identify appropriate park staff to regularly open gates and close	Cheryl Keim	Spring 2004	
		Inform public and members	Cinnamon Catlin-Legutko	Spring 2004	
	Expand visitation hours	Determine expanded hours schedule	Cheryl Keim, Cinnamon Catlin-Legutko	Spring 2004	
		Allocate funding for labor	Cheryl Keim	Spring 2004	
	Identify ADA compliance options	Consider during Carriage House project	Cinnamon Catlin-Legutko	Ongoing	

ADMINISTRATION

GOAL	SOLUTION	STEPS	RESPONSIBILITY	DEADLINE	PRIORITY LEVEL
Revise and create policy to guide museum administration	Formalize policies	Identify appropriate policies	Staff, Board	Winter 2004	3
		Author policies	Cinnamon Catlin-Legutko	Spring 2004	
		Formally approve and adopt policy	Cheryl Keim, Board	Summer 2004	

PRESERVATION OF BUILDINGS AND GROUNDS

GOAL	SOLUTION	STEPS	RESPONSIBILITY	DEADLINE	PRIORITY LEVEL
Preserve historic structures	Improve and maintain structural integrity of the Study	Set preservation priorities and create preservation plan	Board, staff	Winter 2003	1
		Initiate NPS assessment for Study	Cinnamon Catlin-Legutko	Winter 2003	
		Seal foundation and porch areas.	Cinnamon Catlin-Legutko, contractor	Winter 2003	
		Fix and dry/seal basement, including walls and steel	Cinnamon Catlin-Legutko, contractor	Spring 2005	
	Improve and maintain structural integrity of the Carriage House	Establish uses of Carriage House	Board, staff	Fall 2003	
		Begin restoration of Carriage House	Cinnamon Catlin-Legutko, contractor	Spring 2004	
Interpret grounds according to historical records	Develop grounds/gardens as an attraction	Cultivate gardens and outdoor exhibits	Staff, Deb King, Mark Zelonis	Summer 2005	2
		Designate Old John's grave	Cinnamon Catlin-Legutko	Summer 2005	
		Excavate moat and reflecting pool and plant circa Wallace	Cinnamon Catlin-Legutko, contractor	Summer 2005	
		Pathways through gardens	Cinnamon Catlin-Legutko, contractor	Summer 2006	
		Arboretum with clear signage	Cinnamon Catlin-Legutko, contractor	Summer 2006	
	Restoration and maintenance of garden elements	Place ironwork in storage	Cinnamon Catlin-Legutko	Fall 2003	
		Clean and preserve Wallace statue and front gate	Cinnamon Catlin-Legutko	Summer 2004	
		Tree plan and scheduled replacement	Cinnamon Catlin-Legutko, Cheryl Keim	Spring 2005	
		Develop a master plan for grounds with detailed features	Cinnamon Catlin-Legutko, Cheryl Keim, student volunteers	Spring 2005	
		Repair and seal wall	Cinnamon Catlin-Legutko	Spring 2006	

COLLECTIONS

GOAL	SOLUTION	STEPS	RESPONSIBILITY	DEADLINE	PRIORITY LEVEL
Improve collection storage and exhibit environment	Temporary off-site storage	Allocate rental fees	Cheryl Keim, LWSPS	Fall 2004	1
		Locate suitable location	Cinnamon Catlin-Legutko	Winter 2004	
		Pack and move collection	Staff, volunteers	Spring 2004	
	Re-locate collection storage to Carriage House	Complete Carriage House	Cinnamon Catlin-Legutko	Spring 2005	
		Integrate collection storage furniture	Cinnamon Catlin-Legutko	Spring 2005	
	Commission replicas	Ironwork restoration/replicas	Cinnamon Catlin-Legutko	Spring 2006	
		Clothing replicas	Cinnamon Catlin-Legutko	Spring 2006	
	CAP Assessment	Apply for grant	Cinnamon Catlin-Legutko	December 1, 2003	
Align collection management procedures with AAM standards	Gain documented title to collection	Follow IN museum property law	Cinnamon Catlin-Legutko	Spring 2006	2
		Registration forms with proper signatures	Cinnamon Catlin-Legutko	Spring 2006	
	Formal policies, plans and procedures	Regular inventories and complete catalog of collection (including photodocumentation)	Staff, volunteers	Spring 2006	
		Collection policy and registration forms	Cinnamon Catlin-Legutko	Spring 2004	
		Disaster preparedness plan/emergency procedures	Cinnamon Catlin-Legutko	Fall 2004	
		Loan policy	Cinnamon Catlin-Legutko	Spring 2004	
		Exhibit policy	Cinnamon Catlin-Legutko	Fall 2004	
		Collecting plan	Cinnamon Catlin-Legutko	Winter 2005	
		Conservation planning	Cinnamon Catlin-Legutko	Winter 2005	
		Deaccession policy	Cinnamon Catlin-Legutko	Winter 2006	
		Ethics policy	Cinnamon Catlin-Legutko	Spring 2004	
		Establish Collection Committee	Cinnamon Catlin-Legutko	Winter 2006	
		MAP II Assessment	Cinnamon Catlin-Legutko	December 1, 2004	
		Create active loan and collecting program	Incoming loan program	Borrow from locals/collectors and other museum collections for exhibits	
Acquisition budget	Allocate funds		Board	Winter 2003	

DEVELOPMENT

GOAL	SOLUTION	STEPS	RESPONSIBILITY	DEADLINE	PRIORITY LEVEL
Maintain realistic and effective annual budget	Develop a fundraising plan	Hire consultant to write plan and determine first steps	Cinnamon Catlin-Legutko	8/1/2003	1
	Expand membership and benefits of LWSPS	Hire fundraising consultant to initiate first steps	Cinnamon Catlin-Legutko	9/1/2003	
		Create Development Committee	Cinnamon Catlin-Legutko	Fall 2003	
		Target audiences relevant to different aspects of Lew Wallace history, i.e. Civil War historians, international audiences, etc.	Development Committee	Fall 2003	
		Explore benefits of membership	Development Committee	Winter 2003	
		Members night events	Development Committee	Summer 2004	
		Fundraising events, i.e. ice cream socials, galas, etc.	Development Committee	Summer 2004	
		Direct solicitation mailings	Development Committee	Fall 2003	
		Cultivate renewals	Development Committee	Ongoing	
		Informational mailings and meetings to position Study in the community	Development Committee	Winter 2003	
		Annual membership drive	Development Committee	Spring 2004	
	Initiate finance committee	Propose annual Society budget	Tom Fuhrmann	Winter 2003	
	Acquisitions budget	Allocate annual amount for spending	Finance Committee	Winter 2005	
	Endowment fund	Establish fund with MCCF	Finance Committee	Winter 2005	
		Determine annual goals for endowment	Finance Committee	Winter 2005	
	Planned giving program	Create materials and give to key individuals in the community	Finance Committee	Spring 2004	

DEVELOPMENT

GOAL	SOLUTION	STEPS	RESPONSIBILITY	DEADLINE	PRIORITY LEVEL
	Identify viable revenue streams	Define Parks and Recreation budget to reflect actual spending at site	Cinnamon Catlin-Legutko, Cheryl Keim	Fall 2003	
		Annual Society budget	Finance Committee	Winter 2004	
		Ongoing fundraising plan	Cinnamon Catlin-Legutko, consultant	Summer 2004	
		Lew Wallace Festival as a revenue stream	Festival committee	Winter 2003	
		Expand gift shop inventory	Staff	Spring 2005	
		Increase annual visitation	Development Committee	Spring 2004	
	Small gift/grant program	Sponsorships for projects, i.e. conservation of specific pieces	Development Committee	Spring 2004	
		Expand grant solicitation – local, state, and national	Cinnamon Catlin-Legutko	Summer 2003	
Recruit volunteers with skills and interests necessary	Recruit volunteers from the community	Reach-out to social, hobby, professional groups	Staff	Fall 2003	1
		Recruitment mailings	Stacy Klingler	Summer 2003	
		Volunteer job descriptions	Cinnamon Catlin-Legutko	Fall 2003	
		Place ads in newspaper	Stacy Klingler	Spring 2004	
Promote community use of the grounds and regular visits to the Museum	Advertising and PR	Draft Marketing Plan	Cinnamon Catlin-Legutko, consultant	Fall 2004	2
	Develop grounds/gardens as an attraction	Cultivate gardens and outdoor exhibits	Staff, Deb King, Mark Zelonis	Summer 2004	
	Community meetings conducted on site	Complete Carriage House to include meeting space	Cinnamon Catlin-Legutko	Spring 2005	
		Incentives for meeting at site	Stacy Klingler	Spring 2005	

EDUCATION

GOAL	SOLUTION	STEPS	RESPONSIBILITY	DEADLINE	PRIORITY LEVEL
Expand public knowledge of Lew Wallace history, the building and grounds.	Develop a formal educational program for all learning ages	Enhance student/youth visitation experience through structured programs	Stacy Klingler, Cinnamon Catlin-Legutko	Fall 2003	1
		Interpret the grounds with programming and signage – Civil War re-enactments, artist on site, movies on site (themes), arboretum, archaeology, nature programming, candlelight tours, etc.	Stacy Klingler, Cinnamon Catlin-Legutko	Summer 2004+	
		Summer camps, year round workshops and programs	Stacy Klingler, Cinnamon Catlin-Legutko	Fall 2004	
		Develop docent corps	Stacy Klingler	Fall 2004	
		Develop curriculum for use in the classroom that reflect academic standards	Stacy Klingler	Fall 2004	
		Annual Lew Wallace Festival	Stacy Klingler, Cinnamon Catlin-Legutko, Festival Committee	August 1, 2005	
		Use docents in period dress in Study and on grounds to interpret Wallace history	Dee Isenburg	Summer 2004	
		Encourage multiple visits from different age groups	Stacy Klingler	Fall 2004	
		Recruit experts, teachers, volunteers	Stacy Klingler, Cinnamon Catlin-Legutko	Summer 2003	
	Complete Carriage House	Create dedicated educational space	Cinnamon Catlin-Legutko	Spring 2005	
	Educational Outreach Program	Web site provides educational materials and virtual exhibits	Cinnamon Catlin-Legutko	Winter 2004	
		Off-site programming using objects as visuals	Volunteers, Staff	Summer 2003	
		Formal presentations during other group's programming - reach-out to social, hobby, professional groups	Volunteers, Staff	Summer 2003	
	Develop an education collection	Accept donations for the collection and acquire objects	Cinnamon Catlin-Legutko	Fall 2005	
		Develop discovery kits that incorporate academic standards	Stacy Klingler, Cinnamon Catlin-Legutko	Fall 2005	

EDUCATION

GOAL	SOLUTION	STEPS	RESPONSIBILITY	DEADLINE	PRIORITY LEVEL
Develop collaborations with local and state organizations, including area school systems	Collaborate with related historic sites in county	Driving tour of county	Cinnamon Catlin-Legutko, MCHS	Fall 2004	2
		Explore Country Club connection and develop history of site and use their space for presentations, traveling exhibits, etc.	Cinnamon Catlin-Legutko, Dee Isenburg	Winter 2004	
	Collaborate with educational, recreational and tourism groups	Collaborate with other universities, MCHS, museums and Parks and Recreation Dept., county library, and school system	Staff	Summer 2003	
		Develop programming during Strawberry Festival	Staff	Fall 2003	
		Collaborate with Visitor's Bureau – locals bring guest to "show off" Study	Staff, Sharon Kenny	Fall 2003	
	Collaborate with the county's diverse populations	Tie in with Hispanic community (Cinco de Mayo) and other ethnic groups	Staff	Spring 2004	
Develop an active exhibits program	Expand and enhance current exhibits program	Hands-on exhibits	Staff	Fall 2005	3
		Complete Carriage House and re-locate non-period collection to Carriage House – return Study to c. Lew Wallace	Staff, volunteers	Spring 2005	
		Scale model at Carriage House for interpretation of site changes	Staff	Spring 2006	
		Incoming loan program	Cinnamon Catlin-Legutko	Spring 2004	
		Restore Lew Wallace Study, rotating exhibits on different time periods of use	Staff	Spring 2005	
		Borrow from locals/collectors for exhibits	Cinnamon Catlin-Legutko	Fall 2005	
	Employ technology in interpretation	Employ CD-ROM technology – interactive preparation for visit and post visit follow-up	Staff	Fall 2006	
		Use tech tools for outreach, e.g. laptop, LCD projector	Staff	Spring 2004	

Task List Update

This list is pulled directly from the strategic plan and it offers an update of our progress. It should be noted that many of these tasks are ongoing and have become systemic within the organization.

FINAL STATUS REPORT

Key: *Italicized* tasks were added during the 2006 revision. Underlined tasks have been given new timelines.

2003

Summer

- Recruit experts, teachers, and volunteers to help in developing a formal educational program
- Give formal presentations at social, hobby, professional, and other groups
- Collaborate with educational, recreational and tourism groups
- Expand grant solicitation at local, state and national levels
- Recruit volunteers through mailings
- Establish museum identity by changing name to General Lew Wallace Study and Museum
- Obtain improved signage

Fall

- Enhance student/youth visitation experience through structured programs
- Develop Strawberry Festival programming
 - o From 2003 to 2005 we offered free hands on activities for families and youth for Saturday and Sunday of the Festival. In 2004, the Civic Band performed on Sunday of the Festival. While these efforts were great ideas, they failed to attract participants - the most reported were 30-40 over the course of the Festival weekend. This is significantly less than the 20,000+ that attend the Strawberry Festival each year.

- Staff and board have concentrated programming and events on other weekends of the year with tremendous success. The Museum will continue to remain open during regular operational hours on the Festival weekend.
- The Ben-Hur Car Club held its last car show on the museum grounds during the Sunday of the 2003 Festival. In spring of that year, the Park Board ruled that the impact of the car show was detrimental to the root systems of Wallace's historic arboretum (which is supported by forestry officials - http://www.mfc.state.ms.us/Sick_Tree.htm). The Car Club was allowed to hold their last one that year and has since held it in downtown Crawfordsville. Of equal concern is the impact of the cars on archaeological features on the grounds – the site is littered with them. While the car show brought a lot of people to the grounds during this one day event, only 22 people visited the museum. It is recommended that the car show continues to be held in downtown Crawfordsville, not on the study grounds.

- Establish uses of Carriage House
- Place ironwork in storage
- Create Development Committee
- Direct solicitation mailings
- Define Parks and Recreation budget to reflect actual spending at site
- Volunteer job descriptions and reach out to social, hobby, and professional groups
- Locate funding for web site and begin re-design efforts
- Discuss board re-structuring opportunities

Winter

- Initiate NPS assessment for Study
 - No formal assessment report was presented. NPS recommended the CAP report as sufficient.
- Seal Study foundation and porch
 - Completed winter 2003-2004 a slurry topcoat to terraces; re-built entry terrace area; re-set pediment; re-caulked gaps; buried drainage. This is a temporary solution.

- Explore benefits of Society membership
- Informational mailings and meetings to position Study in the community
- Develop Lew Wallace Festival concept
- Author and approve agreement with the City to recognize Society board as Study governance
- Revise Society by-laws and inform membership and public of board re-structure
- Identify appropriate number of board members and begin nominating process
- Initiate board term limits
- Identify appropriate committees and chairpersons, including nominating committee
- Apply for CAP grant

2004

Spring

- Use technological tools for outreach, e.g. laptop, LCL projector
- Begin restoration of the Carriage House (re-defined as a rehabilitation)
- Annual membership drive
- Develop sponsorships for projects
- Recruit volunteers through advertising
- Move collection off-site
- Develop loan policy

Summer

- Begin interpreting grounds with programming and signage

Fall

- Develop summer camps and year round workshops and programs
- Develop docent corps
- Develop curriculum for use in the classroom that reflect academic standards for Indiana
- Encourage multiple visits from different age groups

- Draft marketing plan to promote community use of the grounds and regular visits to the Museum
- Allocate rental fees for temporary off-site storage
- Author charters for Board of Trustees committees

Winter

- Propose annual Society budget
- Use website for educational materials and virtual exhibits
- Explore Country Club connection and develop history of site and use their space for presentations, traveling exhibits, etc.
 - All efforts on hold due to devastating fire
- Identify additional appropriate administrative policies

2005

Spring

- Expand gift shop inventory
- Initiate use of community advisory groups*
 - Centennial Committee used for Centennial Celebration
 - League of Women Voters formed Wallace Women Committee
 - Education Advisory Group formed in 2007; meets regularly
 - Science Advisory Group formed for Lew Wallace – Gentleman Scientist exhibit

Summer

- Determine hours for gates to be open extended hours and notify public
- Explore increasing visitation hours and allocate funding for labor

Fall

- Formalize a long range Education Plan*

Winter

- Develop collection policy and registration forms
- Establish a collections committee*

2006

Spring

- Complete Carriage House Interpretive Center

- Re-locate non-period collection to Carriage House using appropriate storage furniture
- Create a dedicated educational space in the Carriage House
- Promote community use of the carriage house as a meeting space
- Relocate gift shop, administration, and video presentation to Carriage House
- Develop a Value Assessment of Crawfordsville museums and share with stakeholders*
- Develop an education collection through donation & acquisition for use in discovery kits
 - Wallace Women and Meet Lew Wallace discovery kits produced

Summer

- Continue development of grounds by identifying pathways through gardens and effective signage for the arboretum
- Develop exhibits program and define interpretive message*
- Create 5-year exhibits calendar based on annual themes (programming tie-ins)*

Fall/Winter

- Expand educational outreach to include off-site programs using objects as visuals

2007

Spring /Summer

- Develop incoming loan program
- Develop hands-on exhibits

Fall/Winter

- Develop Ethics policy
- MAP Assessment – Collections Management

2008

Spring/Summer

- Create planned giving materials and give to key individuals in the community
- Reconcile catalog records, inventory records, photograph records and locations

1. Gain documented title to the collection following Indiana museum property law and utilizing registration forms with proper signatures
 - 2006 summer intern did full review of collection; only need to gain title to 7-8 items
2. Institute regular inventories of collection
 - Archival collection and stored objects have been inventoried and data entry continues; vault items re-housed with exception of oversized/irregular pieces
 - Oversized/irregular pieces to be stabilized spring 2009 with the success IMLS grant award
3. Formalize complete catalog of collection including photo-documentation
 - Ongoing process

BEYOND CURRENT SCOPE

As we have worked through the current strategic plan, it is apparent that the following projects will not be completed by the end of the plan in September 2008. Funding limitations will require that these projects be explored in the next strategic plan.

- Initiate Endowment Campaign
- Restore Study to circa Lew Wallace
- Fix and seal basement (including walls and steel) in the Study
- Repair and seal wall
- Commission ironwork restoration or replicas
- Develop grounds by cultivating gardens circa Lew Wallace, developing outdoor exhibits, designating Old John's grave, and excavating moat and reflecting pool
- Create driving tour of the county in collaboration with related historic sites
- Tie in with Hispanic community and other ethnic groups
 - Initial contacts made in 2004, looking for opportunities now
- Employ CD-ROM technology to create interactive preparation and follow-up for visits
- Set preservation priorities and create preservation plan for site

- Develop collections management plan
- Formalize collecting plan
- Formalize conservation plan
 - o Commission clothing replicas
- Formalize disaster preparedness plan and emergency procedures
 - o Half of the plan has been drafted, to be finished in 2009
- Develop a master plan for the grounds including tree plan and replacement schedule
 - o Tree inventory complete, assessment in process