



# 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 18<sup>th</sup> 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 *Florican* 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**



## **Appendix: Institutional History, Timeline, and Implementation Of The Wilton House Museum's Strategic Plan September 2017-May 2022**

### **Institutional Description**

Wilton, an impressive example of Colonial American architecture and celebrated for its fully paneled interiors, was built ca. 1753 for William Randolph III and his wife Anne Carter Harrison Randolph, both members of politically active planter families. This centerpiece of their 2,000 acre tobacco and wheat plantation was constructed by both free and enslaved masons and carpenters. Though the majority of these workers are anonymous, a signature “Samson Darrill put up this Cornish in the year of our Lord 1753” was found in the southwest chamber. William Randolph III died in 1761, leaving the management of Wilton to his widow.

Anne Carter Harrison Randolph was active in the “Association for the Non Importation of English Goods” and offered hospitality to several important revolutionaries. George Washington stayed here after attending the Second Virginia Convention in March 1775 where he heard Patrick Henry’s stirring speech ending in “Give me liberty or give me death.” The Marquis de Lafayette and nine hundred troops made their headquarters at Wilton before advancing to victory at Yorktown. The Randolph’s son, Peyton Randolph, served in the Continental Army as an aide-de-camp to Lafayette. When Peyton Randolph’s son William Randolph IV inherited management of the property he, together with his wife Anne Andrews Randolph, made a number of changes to the structure. These included the building of an addition and possibly the commissioning of elaborately plastered ceilings. However, by the time William Randolph IV’s only son Robert Randolph inherited Wilton, the accumulation of debt had left the house “. . . a forlorn ruin,” as described by a visitor. Ultimately, these debts would force his daughter, Catherine Randolph Mayo, to sell the property in 1859, thus ending five generations of Randolph family residence at Wilton.

After a century of Randolphs, Wilton entered a second phase of its history, an era marked by a succession of five owners whose various aspirations to gentility, optimistic farming enterprises, messy legal battles, and bankruptcies informed Wilton’s development from the Civil War to the Great Depression. First purchased by William Carter Knight, Wilton experienced the turmoil of

the Civil War, occupying a strategically significant location along the James River through which both armies crossed in the course of the long conflict. The postbellum period brought additional challenges. The country's evolution from an agrarian to an industrial economy compounded the crippling effects of war, forcing Knight to sell the property in 1869. These same conditions shaped the demographics of Wilton's subsequent owners, three northern industrialists involved in transportation and oil: Patrick Tiernan (1869 – 1873), George Cornwall (1873 – 1908), and George Finnigan (1908 – 1925). Ironically, these northern scions of America's Gilded Age were drawn to Wilton's agricultural prospects and the allure of its historical associations with the antebellum South. They, too, left an imprint on Wilton: Cornwall was likely responsible for extending the windows and adding porches to the structure, while Finnigan's primary focus was toward improving the property and enhancing the agricultural output. Upon Finnigan's death, Richmond businessman Warner Moore (1925-1932) purchased Wilton. However, the economic crash of 1929 impacted Moore's extensive business interests in flour milling, electricity, and transportation. With its mortgage unpaid, Wilton passed to The Bank of Commerce and Trust.

By 1932, Wilton was in foreclosure and threatened with demolition. Recognizing its architectural significance, The National Society of The Colonial Dames of America in the Commonwealth of Virginia (NSCDA-VA) purchased the house and, in 1934, in the face of encroaching industrial development, had it carefully moved and restored at its current location to serve as its Society headquarters. This effort was led by prominent socialite and historic preservationist Calvin Bragg Valentine (Mrs. Granville Valentine). The funds to purchase the house, to acquire new property, and to remove, relocate and restore it, were all raised from among the members of the Virginia Society. Essential professional assistance was provided by the experienced builder Herbert Claiborne, landscape designer Arthur Shurcliff, and historic interiors expert Susan Higgins Nash.

Dedicated to educating the American public, especially our youth, about our nation's early history, the NSCDA- VA opened the house to the public as an historic house museum in 1953. An extensive collection of eighteenth and early nineteenth century fine and decorative art objects was acquired to furnish the rooms according to the evidence of William Randolph IV's 1815 estate inventory. Since Wilton's opening, the NSCDA-VA has been committed to providing the best possible service to the public, continually assessing the needs and interests of our audiences, developments in historical scholarship, new technologies, and best practices. Changes to Wilton House Museum's interiors, tours, and programming over the course of the ensuing decades has reflected this continued self-assessment and vigilant stewardship of this important historic structure.

The National Society of The Colonial Dames of America in the Commonwealth of Virginia and the Wilton House Museum Board are committed to preserving Wilton. The NSCDA-VA and the Wilton House Museum Board and staff recognize that Wilton was carefully moved, restored, and reconstructed at the current site in 1934 under the direction of Mrs. Granville G. Valentine, President of the NSCDA-VA, and Mr. Herbert Augustine Claiborne, II of Claiborne and Taylor, Inc., a local construction firm. No alterations, renovations, or repairs that may threaten, permanently alter, damage or cause the loss of the historic fabric of Wilton will be permitted unless new research justifies such a change.



The Wilton House Museum Collection consists of objects, documents, and artifacts, including but not limited to archaeological and architectural materials, period and reproduction furnishings, books, photographs, prints, and archival materials. These are used together with the Interactive Collection to interpret the eighteenth and early nineteenth century planter lifestyle of Virginia, particularly that of the Randolph family, their peers, and the enslaved people who lived and worked at Wilton.

The NSCDA-VA is charged with maintaining Wilton House Museum as an educational and cultural resource for the citizens of Richmond, the Commonwealth of Virginia, and beyond. It is obligated to ensure the security, preservation, conservation, and appropriate interpretation of the house and its collections. The mission of Wilton requires that this interpretation be both thorough and inclusive.

### **The NSCDA-VA: a 501(c)(3) tax-exempt non-profit charitable organization since 1971**

To be tax-exempt under section 501(c)(3) of the internal revenue code an organization must be organized and operated exclusively for exempt purposes set forth in section 501(c)(3), and none of its earnings may inure to any private shareholder or individual. In addition, it may not be an action organization, i.e., it may not attempt to influence legislation as a substantial part of its activities and it may not participate in any campaign activity for or against political candidates. This status allows us to receive tax-deductible contributions. Under the 501(c)(3), we are a 509(a)2 Public Charity. This designation restricts our operating budget income. Investment income can only account for one-third of our operating budget.

### **Wilton House Museum: AAM Accredited since 1985**

The American Alliance of Museums (AAM) Accreditation is the museum field's primary vehicle for quality assurance, self-regulation, and public accountability, and rewards national recognition to museums committed to excellence in: governance, collection stewardship, public programs, financial stability, professional conduct, and institutional improvement. Developed and sustained by museum professionals for 35 years, AAM's Museum Accreditation program strengthens the profession by promoting practices that enable leaders to make informed decisions, allocate resources wisely, and provide the best possible service to the public.

### **Wilton House Museum Board**

Wilton House Museum Board serves as the governing body for Wilton House Museum, subject to the policies of The National Society of The Colonial Dames of America in the Commonwealth of Virginia. Its purpose is to advance the maintenance and management of Wilton House Museum, its collections, and its grounds, according both to the highest standards of stewardship and to the mission and policies determined by the NSCDA-VA Board of Managers.

Wilton House Museum's Strategic Plan outlines the measurable and reasonable objectives for the institution over the next five years (2017-2022). Guided by a belief in the relevance of history

and a commitment to better *understand, care for, and share* Wilton House Museum, it scrutinizes the institution's six core areas: Curatorial and Interpretation; Preservation and Collections Management; Facilities and Operations; Finance and Development; Education; Communications. This plan also considers the institutional structure to ensure alignment with our strategic priorities and the advancement of our mission.

- ***To Better Understand Wilton***
- ***To Better Care for Wilton***
- ***To Better Share Wilton***

## **Timeline:**

PHASE ONE: September 2017- May 2019

PHASE TWO: June 2019 - May 2021

PHASE THREE: June 2021 – May 2022

## ***Goal #1: To Better Understand Wilton***

### **Strategic Focus: Curatorial and Interpretation**

*Explore and expand the interpretation of Wilton by activating its three collection areas (fine and decorative arts, archival, and archaeological) and incorporating the three periods of historical significance.*

**Strategy 1:** Complete an Interpretation Plan to consider the three chronologies identified in the Historic Structures Report: The Building of Wilton (1753-1859), The Selling of Wilton (1860 – 1932) and the Imagining of Wilton (1933 – 1954). *Executive Director, Consultant* PHASE: ONE

- Secure the funding and hire the appropriate scholar to compose the Interpretation Plan.  
*Executive Director, Development Manager, Consultant* PHASE: ONE
- Revise vision and mission statements to reflect the new Interpretation Plan.  
*Executive Director, Consultant, Strategic Planning Committee* PHASE: ONE
- Research representative voices and people for each of the three chronologies to be compiled and incorporated into the tour and interpretive experiences. *Consultant, Museum Educator* PHASE: ONE
- Research and seek new information to illuminate larger social, political, and economic narratives. *Executive Director, Museum Educator* PHASE: ONE

- Identify appropriate scholars and experts within three chronologies identified in the Historic Structure Report to serve on appropriate panels, think-tanks or committees to contribute to the development of the Interpretation Plan. *Executive Director, Consultant* PHASE: ONE
- Incorporate the new research to convey a wider and more inclusive narrative regarding the long history of the site with particular emphasis on the lives of the enslaved and the influence of women. *Executive Director, Museum Educator* PHASE: ONE

**Strategy 2:** Complete a Furnishings Plan to support the Interpretation Plan. *Executive Director, Consultant* PHASE: TWO

- Establish clear collection goals based on the Interpretation Plan, and create a policy for future collecting. *Executive Director, Consultant* PHASE: TWO
- Create a Conservation Assessment Plan to address the condition and needs of all accessioned objects in the collection. *Collections Manager* PHASE: TWO
- Create a De-Accession Plan, in tandem with the Furnishing Plan and the Conservation Assessment Plan, and in accordance with all procedures outlined in the Collections Management Policy. *Executive Director, Collections Manager* PHASE: TWO
- Continue to assess needs of non-accessioned objects, to be addressed on a case-by-case basis, with a plan for disposal, in accordance with the procedures outlined in the Collections Management Policy. *Executive Director, Collections Manager* PHASE: TWO

**Strategy 3:** Complete and Promote a Multi-Year Exhibition Calendar. *Executive Director, Museum Educator, Development Manager* PHASE: TWO

- Compose an exhibition vision statement in-line with mission and new interpretation plan. Establish and multi-year exhibition calendar that supports the Interpretation Plan and engages a diverse audience. *Executive Director* PHASE TWO

## ***Goal #2: To Better Care for Wilton:***

### **Strategic Focus: Preservation and Collections Management**

*We will sustain best practices in museum stewardship to preserve the integrity of the original structure, its collections, and its grounds.*

**Strategy 4:** Preserve and Maintain Wilton House Museum's Collections in Superior Condition. *Executive Director, Collections Manager* PHASE: ONE

- Update the Collections Management Policy to reflect the new Mission Statement and Interpretation Plan. *Collections Manager* PHASE: TWO

- Preserve, maintain, and catalog the Archival, Photography and Archeological Collections to the highest level of museum stewardship and make accessible. *Collections Manager* PHASE: TWO
- Preserve, maintain, and catalog the NSCDA-VA Archives under the Museum's management, governed by the guidelines outlined in the Collections Management Policy. *Collections Manager* PHASE: TWO
- Ensure Collection Storage is secure and well-maintained so all Museum collections are properly stored and preserved when not on display in the museum. *Collections Manager* PHASE: TWO

**Strategy 5:** Develop a plan to enhance our understanding of the historic site, to guide our continued restoration and renovation of Wilton's interior and exterior and grounds for future restoration efforts. *Executive Director, Development Manager* PHASE: TWO

- Use the Historic Structures Report and Paint Analysis to enhance our understanding of the historic site and to guide all restoration efforts to the historic interior, as directed by the Interpretation Plan. *Executive Director, Consultant* PHASE: TWO
- Secure funding for necessary exterior repairs as outlined in the Capital Expenditures Plan. *Executive Director, Development Manager* PHASE: ONE
- Update and revise the Cyclical Maintenance Plan to ensure all mechanical, electrical, and security systems are functioning at appropriate capacity. *Executive Director, Operations Manager, Collections Manager* PHASE ONE
- Thoroughly research the results of the Historic Structures Report that relate to restoration and renovation projects to the historic structure, as directed by the Interpretation Plan. *Executive Director, Consultant* PHASE: ONE
- Pursue improvement in the area of environmentally sustainable practices and methods are created and developed. *Executive Director, Operations Manager* PHASE: ONE
- Ensure Wilton House Museum and the NSCDA-VA possess sufficient IT framework to support equipment and internet requirements, database and records management, programming exhibition needs, and printing resources for publication, marketing, and public relations demands. *Executive Director, Operations Manager* PHASE: ONE

**Strategy 6:** Commission a Master Site Plan focused on the visitor experience of the interpretation. *Executive Director, Development Manager, Consultant* PHASE: THREE

- The Master Site Plan for Wilton House Museum must be inclusive of the Historic Structure, office and storage space, handicap accessibility, The Dependency, and grounds to serve as a long-range guide for site improvements, modifications and expansions to existing facilities,

space use, and investment in our infrastructure. *Executive Director, Operations Manager, Development Manager* PHASE: THREE

- Integrate the grounds into the broader museum experience as a place for greater community engagement. *Executive Director, Director of Education* PHASE: THREE

## **Strategic Focus: Staffing and Governance**

*Strengthen and diversify our Board and staff, and ensure both have the capacity to successfully implement this plan.*

**Strategy 7:** Establish a Museum Board with the leadership and resources required for fulfilling Wilton House Museum's vision, mission and strategic plan. *Museum Board Chairman, Executive Director, Museum Board* PHASE: TWO

- Revise the Museum Board Governance structure allowing for more than two (2) community volunteers, and phase out Town and County liaisons. NSCDA-VA's Town and County Chairman are encouraged to make recommendations to the Museum Board Chairman for the Museum Board, with an understanding of Museum Board expectations including fundraising. *Museum Board Chairman, Executive Director, Museum Board* PHASE: ONE
- Develop an objective inventory of board skills needed. *Museum Board Chairman, Executive Director, Museum Board* PHASE: ONE
- Recruit Museum Board members for a greater range of needed skills, experiences, influence, diversity who are engaged and committed to the mission and vision of Wilton House Museum. *Museum Board Chairman, Museum Board* PHASE: TWO
- Based on the inventory of needed skills, deliberately cultivate and engage community leaders and identified stakeholders with the goal of future Museum Board service. *Museum Board, Museum Board Chairman, Executive Director, Development Manager, Museum Board,* PHASE: TWO
- A Strategic Planning Committee will regularly monitor the implementation of the Strategic Plan and to make necessary adjustments to ensure success and become a standing committee of the Museum Board. The implementation of this plan will require evaluation to monitor progress and to make necessary adjustments to ensure success. *Museum Board Chairman* PHASE: ONE

**Strategy 8:** To 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. *Executive Director* PHASE: ONE

- Review all salaries and implement changes by the beginning of the next *Executive Director, Finance Committee* PHASE: ONE

- Research the possibility of adding benefits packages for employees. *Executive Director, Finance Committee* PHASE: ONE
- Evaluate the need for additional staff support, including docents, volunteers, and interns, to fully realize the changes as outlined in the Strategic Plan. *Executive Director* PHASE: ONE

**Strategy 9:** To develop a vibrant tour guide program. To strengthen the museum docent program; identify opportunities to attract new volunteers; and develop a comprehensive onboarding and docent training program to strengthen the consistency of Wilton’s visitor experience. *Museum Director* PHASE: ONE – THREE

## **Strategic Focus: Finance and Development**

*Focus on financial security and transparency as we create long-term Development Plan to guide our fundraising efforts.*

**Strategy 10:** To improve fiscal oversight and transparency. *Executive Director, Finance Committee* PHASE: ONE

- Ensure fiscal transparency through accurate reporting, website, and other media. *Executive Director, Operations Manager, Finance Chairman, Development Manager* PHASE: ONE
- Report on overall financial health within a Wilton House Museum Annual Report. *Development Manager* PHASE: ONE
- Secure funding for needs as identified in the Capital Expenditures Plan. *Executive Director, Development Manager* PHASE: ONE
- Align Operating Budget with mission(s) and the Strategic Plan(s). *Executive Director, Finance Chairman* PHASE: ONE

**Strategy 11:** Develop a Comprehensive Fundraising Plan. *Executive Director, Development Manager* PHASE: ONE

- Expand Philanthropic support of the museum through the Annual Fund. Determine Annual Fund goals and create Annual Fund campaign. *Executive Director, Development Manager, Annual Fund Chairman (formerly Development Chairman)* PHASE: ONE
- Hire a consultant to work with organization in the creation of a long-range Development Plan to fund the implementation of the Interpretation Plan within the framework of overall financial needs. *Executive Director* PHASE: ONE
- Conduct a feasibility test of a major gifts campaign to achieve the new interrelation of Wilton. *Museum Board, Executive Director, Development Manager* PHASE: ONE

- Implement the Interpretation Plan through expanded Grant Support, *Executive Director, Development Manager* PHASE: TWO
- Create a plan to cultivate leadership donors. *Executive Director, Development Manager* PHASE: TWO
- Implement and Promote the Planned Giving Program. *Development Manager* PHASE: THREE

## ***Goal #3: To Better Share Wilton***

### **Strategic Focus: Education, Outreach & Communication**

*Invest in the visitor experience, create and promote unique and engaging museum tours, and provide programing that include challenging discussions about the paradoxes of life in Virginia since the 18<sup>th</sup> century – including economic (agrarian versus industrial), social (race, gender, ethnicity), and political relations.*

**Strategy 12:** Develop Educational/Interpretative Tours and Programs. *Executive Director, Museum Educator* PHASE: ONE

- Align all museum programs and events to advance the museum and fulfill our mission. *Executive Director, Museum Educator* PHASE: ONE
- Create family friendly events and expand Youth Programming. *Museum Educator* PHASE: ONE
- Establish a comprehensive tour training program to ensure a knowledgeable and engaging volunteer docent corps. *Museum Educator* PHASE: ONE
- Expand and enhance museum tour offerings to incorporate the expanded narratives and to increase revenue. *Executive Director, Museum Educator* PHASE: ONE
- Provide scholarly lectures by noted experts that enhance our new Interpretive Plan and incorporate the breadth of our mission. *Executive Director, Museum Educator, Development Manager* PHASE: TWO
- Increase value of museum internships by writing internship curriculum and composing internship job descriptions. Interns should participate in docent training program. *Museum Educator* PHASE: TWO
- Expand school field trip options and in-school programming and deepen impact of school age programming by aligning and updating our programs with state and local educational standards and agendas. *Museum Educator* PHASE: THREE

- Enhance visitor experience by welcoming visitors more professionally, improving outdoor gathering spaces, create a welcome area, expand weekend staffing, and update way-finding signs. *Executive Director*, PHASE: THREE

**Strategy 13:** Develop Outreach and Communication Goals. *Executive Director* PHASE: ONE

- Establish clear delegation of museum communication responsibility and streamline execution and oversight. *Executive Director* PHASE: ONE
- Create a social media communication strategy and plan of execution. *Development Manager* PHASE: ONE
- Integrate the new interpretation into each communications strategy and calendar to ensure all museum communications are of one voice including printed and on-line *Executive Director, Development Manager* PHASE: TWO
- Determine a museum voice, brand and logo based on the findings of the interpretation plan and infuse it within all museum communications. *Executive Director, Development Manager, Museum Board* PHASE: TWO
- Invest in more efficient and appropriate donor and audience database *Executive Director, Operations Manager, Development Manager* PHASE: THREE
- Identify and cultivate current stakeholders and potential audiences and communicate regularly with them and align educational programming to attract the identified audiences
  - a. Students and Teachers (All age levels)
  - b. Families
  - c. Scholars and Enthusiasts
  - d. Tourists and Group Tours
  - e. Neighbors and Regional Community
  - f. NSCDA-VA and NSCDA-USA Membership
  - g. Professional and Peer Institutions
  - h. Potential audiences by gender, orientation, race, age, socio-economic condition*Executive Director, Museum Educator, Development Manager* PHASE: TWO
- Ensure Wilton House Museum and the NSCDA-VA possess sufficient IT framework to support equipment and internet requirements, database and records management, programming exhibition needs, and printing resources for publication, marketing, and public relations demands. *Executive Director, Operations Manager* PHASE: ONE
- Establish advertising priorities and align advertising budget and efforts to implement the goals and activities outlined within the Strategic Plan. *Executive Director* PHASE: TWO



- Expand web-based and off-site access to the museum by guarantying the museum web site is rich in content with scholarly information and disseminate new findings and scholarship. *Museum Educator, Collections Manager* PHASE THREE

## **Strategic Focus: Accessibility**

*Expand accessibility to the site and to the collection.*

**Strategy 14:** Expand Physical and Cognitive Access. Develop a plan to increase access the site, historical house, and programing that allow people of all abilities opportunities to better explore and experience Wilton and its collections. *Executive Director, Museum Board* PHASE: TWO

- Form an advisory committee to consider feasibility of physical accessibility options. *Executive Director* PHASE: TWO
- Presentation and consideration of physical accessibility options (Museum Board and Board of Managers. *Advisory Committee, Board Members* PHASE: TWO
- Identify and secure the funding to enhance the site's accessibility. *Executive Director, Development Manager* PHASE: TWO
- Public Presentation of handicapped accessibility plan. *Museum Board Chairman, Executive Director* PHASE: THREE
- Commission contractors to install approved accessibility plan. *Executive Director, Museum Board* PHASE: THREE
- Enhance and utilize the Dependency as handicap accessible for museum programing. Phase. *Operations Manager* PHASE: ONE
- Create a digital version of the changing exhibition on ipads for visitors to explore, including all text and images. Provide appropriate training for the docents. *Museum Educator* PHASE: ONE
- Create a virtual tour of the house with interpretive information that can be accessible on an iphone or ipad. *Museum Educator* PHASE: TWO
- Identify web based portals to place exhibitions online. *Museum Educator* PHASE: TWO

- Create tour experiences accessible to those with a physical or mental handicap.  
*Museum Educator* PHASE: THREE
- Commission and create sensory baskets for each room with hands-on component.  
*Museum Educator* PHASE: ONE

**Strategy 15:** Create diverse offerings for a diverse community. Develop and maintain mission-based programing and an institutional presence that is inclusive of diverse audiences and perspectives.  
*Executive Director, Museum Educator* PHASE: TWO

- Identity local community needs that are not being met and partner with the appropriate organizations to serve. *Executive Director* PHASE: TWO
- Identify and participate in appropriate city-wide events or events targeting certain demographics *Development Manager, Museum Educator* PHASE: TWO
- Acknowledge and incorporate the role of the enslaved in the building and caring for Wilton *Consultant, Museum Educator* PHASE: TWO