

Approved by the Board of Trustees
11/30/2017



WENHAM MUSEUM

Celebrating Childhood
Connecting Generations
Honoring Heritage

VISION 2022

2017-2022 Strategic Plan

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INTRODUCTION

A Letter from the Committee Chairs

Dear Friend and Supporter,

Vision 2022 is the name of the Wenham Museum's Strategic Plan. The planning process for Vision 2022 included in-depth conversations with museum members, donors, volunteers, staff, program participants, community and regional organizations, peer institutions, outside experts, and the Board of Trustees.

Six core goals are the focus of this plan: Exhibits & Programs, Collections, Financial Sustainability, Institutional Advancement, Leadership Development, and Outreach. The plan includes specific goals and action steps focusing on embracing the museum's growing family audience while providing heritage experiences for adults; creating child-centered, artifact-driven experiences that leverage local history and culture to promote learning; refining collections; developing a formal marketing and communications plan; collaborating with organizations, communities and schools; maintaining the museum's accreditation by the American Alliance of Museums; and, increasing revenues to support these efforts and sustain them for the future.

By the museum's 100th anniversary in 2022, the Wenham Museum will be transformed by this Strategic Plan. Outcomes will include a more focused collections policy, increased visibility and brand identity through improved communications strategies and resources, increased school and community partnerships, reinterpretation of the museum's historic house to serve a multigenerational audience, and a program plan that represents the best of the museum's holdings and includes offerings for children, teens and adults. These outcomes will be delivered through a large-scale campaign that reaches loyal supporters and broadens the museum's base of support to raise the funds needed to effectuate and sustain the above changes.

It will be an exciting five years at the Wenham Museum. We look forward to sharing them with you.

Sincerely,

Kennon Anderson, Trustee & Chair
Samantha Grantham, Collections Manager & Chair

MISSION STATEMENT

Wenham Museum celebrates childhood, interprets history, and explores culture for the enrichment of all generations in the greater North Shore community and beyond.

The Museum engages multigenerational members and visitors in examining the promise of the American experiment and provides thought-provoking learning experiences that connect the past, present, and future, in a welcoming and inclusive environment.

VISION STATEMENT

A second century is on the horizon. Wenham Museum is seizing the opportunity to become a more vibrant, distinctive and visible community and cultural resource for Boston's North Shore and audiences beyond.

The Museum enthusiastically retains its commitment to being a family-centered institution. In its collections, exhibits, programs, and events, family history and activities are emphasized and are attracting multi-generational audiences.

Signature programs such as early childhood education and the train collections are augmented by a revitalized and stimulating adult program and special initiatives related to area history, cultural evolution, and the fast-changing world around us. Exploration of fulfilling the promise of the American experiment, viewed through the lenses of family, community, service, citizenship, leadership, and justice provide, rich, timeless programming themes and ideas. A new, complimentary Collections strategy is in place.

The Museum is achieving new levels of financial stability and strength, marked by careful fiscal management and planning, and renewed engagement with and generous philanthropic investment by its various stakeholders. Museum operations are noticeably improved, and the early success of a new capital campaign is helping to address endowment and facilities needs. A refreshed commitment to a fully dimensioned institutional advancement program is making profound impact on all of this work.

The Museum benefits from the expansion and strengthening of the Board of Trustees and the enthusiastic participation of myriad volunteers. The role of the Executive Director is more focused and streamlined, due in part to Staff reorganization and buildout.

The Museum is investing in a formalized external affairs program, combining a more comprehensive marketing/communications function with expanded community outreach and interesting collaborations with other organizations. The Museum is strengthening its brand and raising its visibility. It enjoys a growing reputation as a relevant, dynamic, innovative, and fun institution that is always welcoming.

The new Wenham Museum – informing our lives and inspiring for all!

Goal 1 Exhibits & Programs

Goal: To engage the museum's multigenerational audience through exhibits, programs, and cultural enrichment activities rooted in new, locally based narratives about family life and the childhood experience, community, justice, citizenship, and service.

Rationale: Throughout its 95-year history, Wenham Museum has been well known and beloved for several core programmatic exhibit and program areas: dolls, model railroads, children's programming, and educational offerings about Colonial life. These programmatic areas are still enjoyed by the community and by specific affinity groups. However, they have not been sufficient to motivate broad-based visitation, engagement, and philanthropic support across the community or with funders.

These areas of focus (dolls, model railroads, children's programs, and Colonial life) also primarily attract a limited audience of families with children aged eight and under. While stakeholder feedback indicated this is an area of strength for the museum, there was consistent feedback that the community seeks interesting, exciting, and fun offerings for adults.

In order to broaden the museum's audiences, new programmatic narratives are needed that can support not only high-quality programming for children aged eight and under, but draw in adults and older children and students in an interactive way. These new narratives must also feel relevant, meaningful, and provide context to the present-day lives of the community while being fresh, innovative, and unique in order to attract the visibility and support needed to sustain them within a crowded marketplace. These new narratives are rooted in a commitment to understanding how moments in history shaped family life and relate to justice, service, citizenship, family, and community.

Priority Initiatives:

1. **Children's Programming** – At present, the museum is known and respected for its offerings in the area of early education. As a "first museum experience," the museum provides a convenient, safe, and educational platform for families to play and learn together. Moving forward, the museum will continue to strengthen this program area by developing high quality offerings that are informed by the Guidelines, Standards, and Frameworks created by the Massachusetts Department of Early Education and Care and that are related to the Wenham Museum's over-arching programmatic themes, include hands-on elements and experiential learning, and are supported by artifacts from the museum's collection.

An example of such a program could include learning about the seasons and traditional, seasonal New England activities. This could mean learning about shearing sheep, carding and spinning wool, and weaving cloth. A children's picture book that involves

these tasks could be read to the children, who would then have an opportunity to touch raw wool, see a historic wool wheel, and use various materials such as cotton balls, tissue paper, crayons and glue to create an image of a sheep.

Other examples include large-format public programs such as the museum's Fairy Festival. Drawing on the museum's collection of children's picture books and fairy tales, this program weaves together storytelling, dramatic play, the natural world, and crafting activities into a day-long, well attended annual event.

At present, children's programming (including school group visitation) drives approximately 85% of our visitation and 30% of the museum's overall revenue. A goal of increasing the revenue earned from children's programming to 50% of the museum's operating income would improve institutional financial sustainability.

Generating this increase will require price increases in admission, memberships, and program fees; program grants; increased general visitation; better retention of members as their children enter school; and, more programming targeted to children aged 5 to 8. We know that although most children visiting are aged 8 and under, there is a sharp decline in visitation after age 5, or upon entering kindergarten. Expanding programmatic offerings for children to focus on better retention of children aged 5 to 8 (and beyond) is a necessary first step.

2. **Expansion of Train-Related Offerings** - To date, the museum's train galleries are the biggest ongoing attraction at the Wenham Museum. Our youngest visitors are nearly always coming to push the buttons and watch the engines pull the cars around each of the different model railroad layouts. To many, the Wenham Museum is known as the "Train Museum."

The Train Gallery has been created and maintained by volunteers and is a place of tremendous potential for growth and further audience engagement. The current space is limited and is only usable for viewing the layouts. The cases full of historic objects are difficult to see and there is no room for instruction or interactive uses.

As a core competency and visitation driver, the museum's train-related offerings should be expanded to boost interactivity and hands-on learning. Additional square footage in the museum's lower level—perhaps from the storage/exhibits room—must be reallocated and refitted for public use.

For younger visitors, expanding train-related programming includes increasing the opportunities for train-themed dramatic play, through dress-up, a large-scale locomotive, ticket booth, and other train-related structures. A large format train table that mirrors the local landscape and rail system with curved, map-like boundaries that permit close access, should be installed.

For school-aged children, create a space targeted at “Young Railroaders” will teach children how to build layouts, use tools, and learn about engines in a hands-on age-appropriate way. This space would be staffed for classes.

The historic underpinnings to the train collections should also be more heavily emphasized. The historic exhibit cases and informational panels about Grenville Dodge and the railroad spur to Wenham Lake during the ice trade require updating.

The trains drive a major portion of general visitation but not school visitation. The museum should develop professional development opportunities for teachers that also illustrate how the museum’s train collections could support a diversity of offsite learning opportunities, from language arts to physics. Related school programs that are linked to curriculum frameworks

Lastly, the museum’s train galleries include loyal following of children and young adults on the autism spectrum. More can and should be done to foster collaborations with and support of the autistic community within the museum. These collaborations could include specific hours for autistic visitors and support for educators in using trains in engaging autistic students.

3. **Adult Programming** - The stakeholder engagement process clarified that adults within the museum’s service area admire the work the museum does in the children’s program area, but seek offerings for them as well. In order to broaden the museum’s audiences, new programmatic narratives are needed that can support not only high-quality programming for children, but draw in adults and older students. These new narratives must also feel relevant, meaningful, and provide context to the present-day lives of the community while being fresh, innovative, and unique in order to attract the visibility and support needed to sustain them within a crowded marketplace.

To reach these high expectations, the Strategic Planning Committee has developed a programmatic vision for adult programming at the Wenham Museum that focuses on stories about justice, service (both community service and military service), citizenship, family, and community. These offerings could include:

- The story of Robert Mackclafin, a Scottish prisoner of war and indentured servant at Saugus Iron Works, explores several relevant themes regarding: citizenship, class, human trafficking, prisoners of war and slavery. Programming in support of this narrative could include:
 - o Lectures and panel discussions on both historic and contemporary Scottish culture and the Scottish diaspora around the globe;
 - o Partnership with the National Parks Service/Saugus Iron Works to learn more about Robert Mackclafin’s work at the Iron Works and his compatriots who

are interred there within a mass grave; and,

- Scottish culture and heritage based-programs involving literature, dress, music, food and libations.
 - Reverend Joseph Gerrish, minister of Wenham during the Salem witch hysteria, is an inspiring example of one who pursued justice and defended adherence to judicial process.
 - Elizabeth Richards Horton's "Miss Columbia story" exemplifies one woman's commitment to service using her passions and interests to fundraise for child-centric philanthropies. Exhibits, programs, and cultural enrichment supported by this narrative could include:
 - Family-based workshops to talk about giving, sharing philanthropic values with younger generations, and the impact that individuals can make in improving the world around them;
 - Exploring the history of philanthropy in America and Essex County in particular; and,
 - Highlighting other women from the past and present who are local leaders in philanthropy.
 - The Industrial Revolution, expanded rail systems and the ice industry brought changes to the Wenham community in the form of Great Estates, equestrian pursuits, arrival of immigrant labor and social divides of America's class system.
 - The Patton Archive shares a family story, whose documents allow us to explore the legacy of the Vietnam War, the all-volunteer military, decisions to use force and changing societal attitudes towards veterans over time. This Archive is also a comprehensive overview of one prominent family's life on the North Shore in the late 20th century.
4. **Culture & Community** - Art, theater, musical performance, and other cultural activities have often supported learning and created avenues for engagement at the Wenham Museum. While the museum does not intend to include art within its collections or become a performing arts center, art and culture-related programming has a valuable role to play in convening community and in introducing a wider audience to the museum's core programmatic focus.

A diverse array of cultural and community events can be offered that include short-term art exhibits featuring local artists; exploration of topics unique to Wenham history and culture; musical and theatrical performance; book signings and author visits that appeal

to a wide array of community interests and support programmatic initiatives; and, an increase in participation in the Student Art Gallery by accelerating the rotation of schools displaying works in the gallery and invite a wider, regional diversity of schools to participate.

5. **Refinement of Planning Process** - Bringing all of the above programmatic initiatives to life will require an overhaul of current internal museum planning practices regarding the conceptualization, creation, execution, and evaluation of museum offerings. To date, planning has been a staff-driven endeavor due to time and resource constraints.

Moving forward, the planning process must become more forward-thinking, more collaborative (both internally and externally with donors, members, and other stakeholders), more intentional, and occur with significantly longer lead times in order to cultivate appropriate philanthropic support for specific projects and to foster collaborations with partner organizations. Clear goals and metrics are needed for offerings that include alignment with the Strategic Plan, articulation of intended audiences, anticipated visitation, projected revenue, and associated expenses. Formalized evaluation practices against these predetermined goals and metrics are also required.

GOAL 2 Collections

Goal: To cultivate a targeted, clearly conceived collection that supports the narratives and themes of this Strategic Plan and that can be sustainably supported by the museum's resources.

Rationale: With focused series of programmatic themes and stories, the Wenham Museum's collection (which includes the historic Claflin-Gerrish-Richards House and shoe shop) requires refinement. At present, the collection is over-broad and has expanded beyond the institution's resources for storage, care, and display. Current holdings must be reevaluated against these programmatic goals and against the museum's realistic capacity for storage, care, and display in accordance with the museum's Collections Policy.

Priority Initiatives:

1. **Targeted, Limited Acquisition.** Given the museum's finite collections storage space and other resources, new acquisitions will be limited. The museum will develop a targeted list of key artifacts that would complete or improve central stories and themes. Outside of this targeted list of new acquisitions, the museum will generally not accept new objects into its collection. Exceptions may be made on a case-by-case basis according to then-applicable policy and procedure.
2. **Inventory & Cataloging.** Continue the museum's current projects to inventory and catalog, when possible, all objects in the museum's collection into the collections management database. With a clear, searchable understanding of current collections, the museum will be able to manage its collection through accession and deaccession, plan for exhibits, and plan conservation goals.
3. **Right-Sizing Collections.** To support the programmatic goals of this Strategic Plan, to foster better storage, care, and preservation conditions for artifacts, and to align the size of the museum's collection with its resources—in terms of space, staffing, and funding--the size of the museum's existing collection will be reduced. This will permit all of the museum's objects to be stored within the museum's designated storage areas. In right-sizing collections, an emphasis will be made to retain objects of quality over quantity.
4. **Exploration of Permanent Offsite Storage Solutions.** As collections are limited in storage space, so are programs and exhibits. One possible way of expanding available public-facing space within the museum is to relocate collections to offsite storage. Museum staff will explore offsite storage possibilities and quantify the initial and year-over-year costs of same for possible inclusion in a larger fundraising campaign.

5. **Policy and Procedure in support of Best Practices.** Wenham Museum will continue to adopt, adhere to, and enforce current best practices in collections management as embodied in the AAM's standards of excellence and the museums' current Collections Policy, Collections Plan, and Conservation Plan (as they may be amended).

6. **Climate Control and Humidity.** The museum continues to struggle with appropriate climate control and humidity control within its storage spaces. Humidity, in particular, has been a particular challenge. To the extent collections will continue to be stored onsite, additional heating and cooling zones will need to be created as will a system-wide dehumidification/humidification system in order to ameliorate these challenges.

GOAL 3

Financial Sustainability

Goal: Create a comprehensive, multi-year financial plan and model for the Wenham Museum that will assure positive year-to-year operating stability and build long-term financial and institutional good health.

Rationale: Recent financial difficulties have cast a shadow over the Museum, generating anxiety that has created distraction from focus on fulfillment of the Museum's mission and the exhibits, programs, events, etc. that are the heart of the institution. With its new programmatic vision and other imperatives for success in its second century, the Museum must have a transparent, broadly supported, and achievable financial game plan that will move it from "survive" to "thrive" while meeting all of the standards for continuing AAM accreditation.

Priority Initiatives:

1. **Balanced Budget** – Achieve a balanced budget in the next 1-2 fiscal years. Develop responsible annual progress benchmarks. Emphasize new revenue generation via increased philanthropy for operations ("contributed revenue"). Seek incremental, multi-year gift commitments to provide a reasonable runway for achieving long-term revenue sustainability. Continue to be vigilant re cost control without starving the Museum's essential functional capacity.
2. **Expense Control** - Continue to be very disciplined in managing the Museum's operating expenses. Additional cuts may be necessary, but hopefully without further reducing the Museum's programmatic and other essential operating capabilities while the Museum strives to generate reliable new streams of revenue.
3. **New Revenue Sourcing** - Aggressively seek new operating revenue (\$100,000 - \$200,000 annually) via increased philanthropy (from individuals, foundations, and corporations) to "frontload" investment in new and enhanced exhibits, programs, and events, and key enhanced administrative functions (such as advancement and marketing/communications). As these dollars are put to work in the near term, the Museum will be able to generate new streams of earned income (from membership, visitors, events, special programs, etc.) to create appropriately balanced revenue flows for the long term.
4. **Endowment & Reserves** - Beginning immediately but with an eye toward an eventual new capital campaign, seek to build the Museum's endowment to a minimum initial level of \$3,000,000 - \$4,000,000 as quickly as possible. (At a 5% spend rate, this would generate \$150,000 - \$200,000 in new operating revenue. These would be "fungible" or "incremental" dollars according to the Museum's preference and donors' wishes.) As soon as possible but perhaps over a few years, build a separate operating reserve

account to help deal with unexpected annual expenses/surprises, provide a self-funded source for cash-flow management, etc.

5. **New Campaign** - A new campaign, with emphasis on the acquisition of new endowment, has been recommended for some time, going back a decade or more, but has not been acted upon. Within 12 months, initiate a formal campaign planning process to develop the campaign case & priority needs, identify top-level volunteer leadership, identify, qualify, and engage initial leadership prospects (all sources), create a preliminary campaign communications plan, develop a campaign budget, and design a preliminary overall campaign plan. Consider retaining qualified outside fund-raising counsel to guide this work. The presence of a new, appropriately qualified Director of Museum Advancement is regarded as mandatory prior to undertaking this work.
6. **Financial Operations** - Maintain practices that are currently in place regarding ongoing financial management and controls, oversight of the Board of Trustees' Finance Committee, and annual reporting processes such as audited financial statements, tax returns, etc. to insure the Museum's compliance with the law and protection of its non-profit (tax-exempt) status.

Goal 4

Institutional Advancement

Goal: Reconstitute the Wenham Museum’s Advancement (Development) program as a mainstream enterprise, utilizing a more traditional strategy that combines the core activities of constituency relations, fund-raising, and advancement communications.

Rationale: With a refreshed and more ambitious Museum programmatic agenda, and the clear need for dramatically increased philanthropic support (for operations and unrestricted uses, endowment, capital projects, etc.), the Museum requires a comprehensive, proactive, consistently applied, and productive advancement function.

Priority Initiatives:

1. **Constituency Relations & Membership** - Design and execute a comprehensive “friend-raising” program to attract and engage all Museum stakeholders, including an actively managed Museum Membership program. Incorporate in these initiatives greater Museum visibility, benefits/privileges hierarchy, educational programming, events/trips, volunteer opportunities & input, communications, a calendar, and best AAM & NEMA practices in Member acquisition & retention.
2. **Annual Fund** - Seek aggressive growth in the Annual Fund as the first fund-raising priority in support of operations. Utilize a predictive fund-raising model employing data analysis & gift scale projection. Provide special gift opportunities to broaden and inspire leadership giving and capacity-building, install donor upgrade and acquisition programs. Resurrect Corporate Giving program when ready. Re-engage the Board of Trustees and other volunteers to personalize appeals & donor/prospect contact. Raise AF visibility and celebrate AF impact via Museum communications. Build out donor relations program.
3. **Major Gifts/Special Initiatives/Planned Giving Fund-Raising** - Continue with current special initiatives (Equestrian & Military Programs). Create a formal Major Gifts donor/prospect pool and install active management protocols, incorporating prospect qualification/research, development of individual strategies and tactical “moves management” and tracking, prospect cultivation, volunteer engagement & training, and a donor relations program.

Commence planning for a new campaign as soon as practicable; employ appropriately qualified & experienced outside counsel to guide this work. Add a planned giving program when appropriate.

4. **Advancement Committee** - Resurrect a Board-level standing committee to oversee & advise on the Advancement program. Include Board members and others with emphasis on active volunteer participation in all aspects of Advancement activity.
5. **Advancement Communications** - Define and execute a communications program that supports the full Advancement program agenda. Coordinate this with/seek the assistance of the Marketing/Communications office to assure congruence with the Museum's overall communications effort.
6. **Dedicated Staffing** - Appoint a new Director of Institutional Advancement with responsibility for all aspects of Advancement programming. A full-time appointment is desirable. Add additional staff as program success and the budget allow.
7. **Advancement Operations** - Provide an adequate department budget with appropriate management protocols and coordination with Finance Office. Assure availability of a state-of-the-art Advancement database and training for staff.
8. **Documented Planning** - Develop a written, multi-year Advancement Program Plan with priority activities clearly identified in each area and a specific annual tactical execution plan and budget.

GOAL 5 Leadership Development

Goal: Strengthen the role of the Board of Trustees in its leadership of the Wenham Museum, via enlargement of the Board, education, full participation in the work of the full Board and its committees, engagement in the active work necessary to implement this Strategic Plan, and enthusiastic Museum ambassadorship.

Streamline and refocus the job description of the Executive Director to emphasize CEO responsibilities, external relations, and acquisition of the human and financial resources needed to move the Museum forward. Reduce the volume of the ED's internal tactical administrative work in various Museum functions (for example, Finance, Advancement, Communications).

As a result of the approval of this Strategic Plan, reconsider the Museum's staffing plan to assure appropriately skilled programmatic and administrative leadership at all levels, organized in the most advantageous manner, in the right FTE proportions, and at the right cost. Concurrently, reconsider the Museum's internal functional planning practices.

Rationale: Recent Museum phenomena (financial situation, downsizing of the Museum staff, program pullbacks, etc.) have narrowed Wenham Museum's leadership focus, blurred lines of governance and administrative responsibility, and created overdependence on limited staff capability. This Strategic Plan requires restitution and/or adjustment of traditional leader roles and universal high functioning at every level across the Board, Executive Director, and staff.

Priority Initiatives:

1. **Board Size & Recruitment** - Enlarge the Board from its current size to approximately 20 members. To support all aspects of the Museum's programming and operations, and to strengthen the influence and impact of the governance function, a larger Board is required, with experience, expertise/skillsets, connections, etc. that can best meet the imperatives of this Strategic Plan.
2. **Governance Committee** - Restore this committee to be a fully functioning standing committee of the Board. In addition to being responsible for Board recruitment, broaden the Committee's charge to more of a traditional Board Development role: orientation & ongoing education; succession planning & leadership training; the Board's agenda; Board organization & operations; oversight of Board/Museum compliance requirements; policy development; reporting protocols; Board performance evaluation; etc.
3. **Board as Active Volunteers** - Strengthen the grass-roots volunteer activity of Board members, individually and collectively, in support of Museum priorities as directed by

this Strategic Plan, while maintaining the independent administrative, governance, and oversight functions of the Board and staff.

4. **Executive Director as CEO** - Conduct a full review of the Executive Director's current job description and functional realities, to clarify both priority functions/responsibilities as well as "give ups" that will allow the ED to function as much as possible on core Museum CEO responsibilities in alignment with this Strategic Plan. The Museum's impending imperatives in marketing/communications, fund-raising, and other external activities, and the Executive Director's necessary commitments thereof, should be taken into account.
5. **Museum Staffing, Organization, and Planning** - In parallel with the review of the Executive Director's role as above, conduct a review of the Museum's staffing & professional development, organization, and operational planning with an eye to improvements, collaborations, new efficiencies, etc. that may be desirable and possible over time.

Goal 6

Outreach: Marketing, Communications and External Affairs

Goal: Expand the scope of the Wenham Museum's Marketing & Communications and External Affairs program to raise visibility and, ultimately, increase earned income, visitation, program attendance, membership, and philanthropy.

Rationale: With revitalized Wenham Museum programming and a clear need for financial stability, it is imperative that the Marketing & Communications and External Affairs program be as robust as possible. Clear, concise, and consistent targeted marketing initiatives and the establishment of long-term strategic partnerships with area businesses, non-profit organizations, and government agencies are essential components for the museum's success and longevity.

Priority Initiatives:

1. **Key Target Audiences & Personas** - Identify museum target audiences and develop segmented personas that include basic demographic information, key value-drivers and interests for museum experience, preferred communications channels, and other relevant information that will inform a strong marketing & communications plan.
2. **Wenham Museum Brand** - Sharpen a detailed brand identity to build the museum's reputation, make it stand out from its competition, and project institutional values to attract new visitors and encourage repeat visitation. Establish a visual identity and museum voice, and create a comprehensive Style Guide for reference.
3. **Website and Online Content** - Redesign a user-friendly, visually compelling, and mobile-friendly website that includes clear navigation and concise, actionable messaging for all targeted audiences. To boost engagement, increase social media presence using fun, entertaining content and photography.
4. **Community Relations / Partnership Development** - Seek aggressive growth in developing partnerships that raise museum awareness to targeted audiences, increase added value for museum visitors, donors, and program attendees, and enhance relationships with local entities and municipalities.
5. **Marketing Communications Budget & Calendar** - Design and execute a comprehensive yearly marketing communications plan, including detailed plans for 1) institutional marketing and 2) individual exhibit, educational programming, and special events. Incorporate Membership and Institutional Advancement plans, and include any Partner needs.

6. **Public Relations** - Develop deeper relationships with local press (print, online, radio, and television); raise museum visibility by increasing the number of press releases, calendar of events listings, and story pitches.
7. **Evaluation** - Exercise ongoing visitor research, surveys, focus groups, and segmentation studies. Continue staff post mortem reviews of exhibits and special events. Continue analysis of current museum trends, audience development tactics, and marketing and technology trends and best practices. Conduct Return on Investment analysis of marketing initiatives. Consistently assess web traffic, online advertising, and Search Engine Optimization and Marketing (SEO/SEM). Adjust plans and budgets accordingly.
8. **Dedicated Staffing** - Appoint a full-time Director of Marketing & Communications to achieve departmental goals as outlined. Add additional staff, volunteers, and interns as needed.

IMPLEMENTATION PLAN TEMPLATE



Wenham Museum
Template for Strategic Plan Implementation Grid
November 2017

GOAL 1: Continue to meet or exceed the American Alliance of Museums' standards for collections care and management through efforts to improve collections storage and display facilities.

	Initiative	Time Frame	Responsible Parties	Projected Cost		Comments
				Operating	Capital	
1						
2						
3						

A P P E N D I C E S

STRATEGIC PLANNING COMMITTEE

Chairs

Kennon Anderson
Vice President & Trustee, Wenham Museum

Samantha Grantham
Collections Manager, Wenham Museum

Committee Members

Abby Battis
Associate Director for Collections, Historic Beverly

Jane Bowers
Exhibitions Curator & Manager, Wenham Museum

Kathleen Feldman
Manager of Grants & Operations, Wenham Museum

Michael S. Lucy
Assistant Treasurer & Trustee, Wenham Museum

Mary McDonald
Director of Education, Retired, Wenham Museum

William Phippen
Director of Museum Collection Services, Retired, Peabody Essex Museum

Elizabeth Skates
Museum Professional & Former Trustee, Wenham Museum

Ingrid Swanson
Art Professional, Retired

Lindsay Whitman
Wenham Museum Member & Marketing Professional

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Special Thanks

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