

**The National Society of The Colonial Dames of America
in The State of Connecticut
Strategic Plan
2013 - 2018**

Primary Objectives

There are 5 primary objectives included in the strategic plan. These include:

1. Membership:

Strategic Position: Membership is the most critical priority for the Dames. We commit to using the next three years to increase our membership and position ourselves for long term sustainability. To do so will require the following:

- 1.1. Activate the Areas in ways that attract new members and increases retention of current members. *Begin 9/2013 by having Chairs and at least 2 activities planned for each Area per year.*
- 1.2. Engage the membership at large with the Museum through its programming and fundraising.
- 1.3. Consider establishing a fund to subsidize long term deserving members who are unable to meet membership obligations.
- 1.4. Identify and implement a variety of membership recruitment strategies that target diverse prospects in terms of age and geography. *Options recommended to Board of Managers by 10/2013. Use the campaign to solicit ideas around this.*
- 1.5. Adopt membership benefits that are meaningful to current and prospective members. *For adoption at the October 2013 Board meeting.*
- 1.6. Train emerging leaders for Board positions and create a succession plan for volunteer leadership. *Create plan by 5/2014 and begin training 9/2014*
- 1.7. Grow the number of members every year until such time as it reaches a minimum of 350 members *by 5/2015*

Our vision for membership

The National Society of Colonial Dames of America in the State of Connecticut has a membership body that is growing in numbers, has an engaged and committed membership at large, trained and diverse leadership and exceptional programming for its members. We are a model for other states to follow. We attract diverse members both in age and geography and are welcoming to all who share in the commitment to our mission.

2. Community Relations

Strategic Position: We recognize that the Museum has benefitted from significant growth in community awareness and engagement over the last 5 years. This is due to the exceptional leadership of Charles Lyle, the Museum's Executive Director. We also recognize that the Capital Campaign and subsequent building project will draw even more public attention. We are committed to leveraging the opportunities that this presents for furthering the mission and vision of the Museum and the Dames.

To do so will include the following:

- 2.1. Provide exemplary programs for members and public at large. *Ongoing*
- 2.2 Upgrade and maintain website to include online giving and innovative options such as search your ancestry online. *By May 2014.*
- 2.3 Increase public awareness of the Dames and their mission. *Create a task force of Dames and Museum Advisory Board members to create plan for this. Plan in place for 1/1/2014.*
- 2.4 Strengthen community engagement. *Ongoing. Consider creation of committee of the Board for community engagement.*

3. Fundraising

Strategic Position: We understand that effective fundraising is essential to our success in the short and long term. We are committed to conducting fundraising in an appropriate and professional manner in such ways that will meet our current and ongoing needs. This includes fundraising for the building project, endowment and annual operating support of the Museum and the Dames.

To do so requires:

- 3.1. Conduct a fundraising feasibility study for the Capital Campaign. *By October 2013*
- 3.2. Hire a part-time campaign manager. *Timing to be determined based on recommendations from feasibility study.*
- 3.3. Engage the Museum Advisory Board in all fundraising. *Ongoing*
- 3.4. Complete a successful Capital Campaign. *Timing to be determined based on recommendations from feasibility study.*
- 3.5. Increase annual fundraising in such a way that it also strengthens fundraising for the Museum. *Ongoing*
- 3.6. Make it possible that Museum supporters can make contributions of cash or planned gifts that are designated for the Museum. *Before start of solicitations for capital campaign.*
- 3.7. Leverage the fundraising for the Elizabeth Colt Society and the endowment that is accomplished in the Capital Campaign to continue ongoing fundraising through planned giving. *Upon completion of capital campaign and ongoing.*

4. Trusted Stewards

Strategic Position: We are the proud owners of the Webb Deane Stevens Museum, its properties and collections and understand the stewardship of such to be our primary purpose. We commit to upholding the highest standards of care for the Museum and will be its trusted stewards.

In order to achieve this we will:

- 4.1. Implement the Museum preservation plan as it has been approved in 2005.
Through 2015
- 4.2. Review the preservation plan on an ongoing basis.
- 4.3. Maintain the highest standards in preservation for the Museum properties and collections. *Ongoing*
- 4.4. Support the continued accreditation of the Museum by the American Association of Museums. *Keep standards and information necessary to be prepared for reaccreditation in 2027.*
- 4.5. Identify and take part in collaborations and activities in the local, state and regional communities that promote our mission and the mission of the Museum.
Ongoing

5. Organizational Relations

Strategic Position: We uphold the necessity of our working together with the Museum as strategic partners and will seek to continually improve upon that relationship.

Within the course of this plan and on an ongoing basis this shall include:

- 5.1. Implementing strategic plans for the Dames and the Museum that are mutually beneficial and take the needs of both organizations into account at all times.
- 5.2. Continue to strengthen the relationship with the Museum Advisory Board and the Dames by working with them to achieve jointly held goals for the Museum.
- 5.3. Prioritizing relationship building with Museum supporters at large including but not limited to members, donors and funders and the at large community.
- 5.4. Plan and promote shared programming, fundraising and marketing with the Museum.

Positions of Strength and Opportunity

There are 12 primary positions of strength for the Dames that were identified in the planning process. These strengths support the overall growth and health of the Museum as well as provide opportunities for growth of the Dames.

These include:

1. The Dames membership has grown over the last two years as a result of strong leadership in the registrar position.
2. The Dames own and are outstanding stewards of the Webb Deane Stevens Museum and property.
3. Dames are deeply committed to the Museum and are supportive of actions necessary to ensure its success.
4. The Museum is a well-respected and established institution recognized as a leading historic house museum in the state and region.
5. The Museum is operated under the credible and well respected leadership of our current Executive Director, Charles Lyle. Charles is held in high esteem by the Dames and all museum constituency groups including community representatives, donors, volunteers and staff.
6. The Museum and its property are highly valued for their historic relevance and contribution to the tourism and vitality of Historic Wethersfield.
7. People notice and appreciate the expanded community outreach that the Museum has realized since Charles' arrival 5 years ago. There is support for this to continue its upward trajectory.
8. The Museum has recently completed its own strategic plan which outlines a map for growth in its fundraising, community presence, and long term health.
9. This plan recognizes the critical need for strong relationships between the Dames and museum supporters.
10. Members of the Advisory Board are willing to become more engaged with the Museum and are a source of great opportunities in multiple ways.
11. There is at present approximately \$1.7M that was raised for the Capital Campaign. This provides a solid foundation for completing the campaign.
12. There are significant resources available to the Dames through National that can be used to jumpstart marketing and other similar efforts.

Areas of Growth

There are 12 primary areas of growth for the Dames that were identified in the planning process. These areas of growth are also current areas of weaknesses and are important to address over the next 3 – 5 years. There is significant benefit that the Dames and the Museum will experience as a result of addressing these issues.

These include:

1. The work of the registrar has been exceptional; however, the pool of candidates used over the past several years may be significantly diminished.
2. New and additional strategies need to be put into place to keep membership growing at the rate of growth needed for sustainability.
3. The current membership body is aging and younger members are not joining at a sufficient pace.
4. The benefits of membership need to be clearly stated and communicated.
5. Membership benefits need to be compelling enough to attract and retain members.
6. There is a significant cost and time commitment associated with the application process largely related to genealogical research.
7. Areas committees should be better organized and more active.
8. There is not currently sufficient staff or office space available to adequately support the campaign fundraising.
9. With a few exceptions, Board members and membership at large do not have the fundraising experience necessary to conduct a capital campaign.
10. The Dames should help the general public to better understand the relationship between The Dames and the Museum as well as to develop personal relationships with members of the community and Museum supporters.
11. There is opportunity for increased communications between The Museum and its current and prospective supporters. Examples include; electronic and print newsletters, electronic updates to members, additional and varied fundraising solicitations and outreach to potential school audiences.
12. Rental income from the Barn has grown significantly over the last three years. The Museum is heavily reliant on this income. There is a need for increasing and diversifying additional sources of revenue.