STRATEGIC PLAN SUMMARY
AND GOALS FOR SUCCESS

July 1, 2015 – June 30, 2020
June, 2015

Dear Hill-Stead Museum Friends,

In an effort to achieve Hill-Stead Museum’s aspiration of becoming a preeminent cultural destination of historical significance, the organization will strive to meet two powerful strategic goals over the next three years:

- Excellence through **INTERPRETATION**
- Organizational **SUSTAINABILITY**

This plan was created to guide and inform those making strategic decisions, and in a clear way, help Hill-Stead to achieve these goals. Each area within the museum is empowered to envision its future, develop its own paths to success, and contribute to the legacy of Theodate Pope Riddle in diverse and creative ways. The resulting document encompasses six months of collaborative work, engaging the entire Hill-Stead family, from Trustees, Board and staff to donors, volunteers, neighbors, and community members. The plan presented will guide us as we develop, implement, and regularly monitor our movement forward.

Like an investment, interpretation and sustainability require appropriate levels of support. It is our friends and benefactors who, time and again, answer the call and make Hill-Stead a very special place worth preserving for generations to come.

I extend my sincere appreciation to the individuals who shared their time, knowledge, and valuable opinions over the past few months to inform this strategic plan. Hill-Stead Museum is on the path to long-term success—please join us on the journey!

Susan Ballek
Executive Director and CEO
INTRODUCTION

The Strategic Planning process has been a comprehensive endeavor for determining how to best achieve agreed upon goals as an organization. Hill-Stead Museum’s Strategic Plan appraises the full potential of the museum and links the objectives to the actions and resources required for success and longevity. Hill-Stead’s three year Strategic Plan has been designed to achieve the following:

- Describe the current mission, vision, and fundamental values
- Target potential new opportunities and explore emerging threats
- Understand the current and future priorities of its constituents
- Analyze strengths and weaknesses relative to competitors
- Identify and evaluate alternative strategies
- Define stakeholder expectations and establish clear and compelling objectives
- Prepare programs, policies, and plans to implement the strategy
- Establish supportive organizational structures, decision processes, and information systems
- Allocate resources to develop critical capabilities and innovations
- Plan for and respond to contingencies and environmental changes
- Monitor performance

Principal objectives during the creation of this strategic plan have been to:

**Evaluate** Hill-Stead Museum’s preparedness for long-term sustainability through visitation, membership, public relations, and fundraising. Each initiative will be designed to increase financial capacity and museum awareness.

**Analyze** the attitudes of selected board members, community leaders, donors and friends of Hill-Stead Museum toward leadership, governance, innovation, education, collections, and philanthropy.

**Determine** the optimal timing for the implementation of any major initiative, change and/or innovation.

**Propose** a realistic, three year plan for advancing Hill-Stead and ensuring re-accreditation by the American Alliance of Museums in July 2017.
VISION & MISSION TRANSFORMATION

Clear mission and vision statements are the most critical elements of a successful organization-wide transformation and at the heart of creating a viable strategic plan. Mission and vision statements should be completely representative of what an organization does. They clearly state goals and ideals, and concisely communicate these points to constituents.

Revision of Hill-Stead Museum’s mission, along with the creation of a new strategic vision, will be crucial action steps during the first year of this strategic plan.

Our Current Mission

Hill-Stead Museum, a National Historic Landmark, serves diverse audiences in Connecticut and beyond as a welcoming place for learning, reflection and enjoyment. The museum develops, preserves, documents, displays and interprets its exceptional Impressionist paintings, 1901 historic house and 152-acre landscape for the benefit of present and future generations.

Our Current Vision

Hill-Stead Museum will become an internationally acclaimed, self-sustaining, educational cultural resource where art, architecture and artifacts merge with landscape and literary traditions to create a place of reflection, peace, beauty and healing.
ORGANIZATIONAL VALUES

Institutional values are the beliefs that guide the behaviors and work of an organization. Hill-Stead’s values drive strategy and decisions and contribute to the success of the museum. Hill-Stead’s culture is determined by its values and philosophy.

Values are the ideals and inspiration that guide the decisions and actions taken by all Hill-Stead stakeholders. As Hill-Stead continues to grow and develop, the culture will change. It is recognized that these values are influenced by past, present, and future attitudes and principles.

Integrity

- We demonstrate mutual respect in all interactions and communications between and among board members, staff, volunteers, donors, visitors, customers, and vendors.
- We are dedicated to the professional care and stewardship of our collections.
- We communicate openly and honestly.
Visitor & Donor Centric
- We are a welcoming place for all.
- We remain true to our founder’s progressiveness and emulate her sense of hospitality, adventure, and intellectual curiosity.
- We are committed to integrating with the region’s art and cultural communities.
- We contribute to the enrichment of artistic and cultural activity regionally and locally.
- Our activities and actions are implemented to provide satisfaction among donors, volunteers, and visitors.
- We respond to our donors and customers with integrity and respect. They are the reason for our work.
- We continuously improve processes to anticipate, understand, and respond promptly to all customer needs and utilize that understanding to add more value.

Results Oriented
- We are accountable for fiscal and operational policies and procedures in keeping with the vision of our founder to maintain, in pristine condition, the buildings, collection, and grounds, and to minimize financial risk and liabilities.
- We are responsible for programs and activities that promote our vision and have measurable favorable impact on our community.
- We are responsible for philanthropy, visitor, educational, and membership goals.

The organizational values of Hill-Stead create our pathway for success.
HILL-STEAD’S PATHWAY FOR INNOVATION AND SUCCESS

This pathway allows us to progress toward the agreed upon Hill-Stead goals of this strategic plan. They must and will be consistently reviewed and, as needed, altered. When followed, this pathway will allow Hill-Stead to demonstrate its commitment to the legacy of Theodate Pope Riddle.

PATHWAY I. Connecting through Engagement and Experiences: There is no greater or more transformational experience that the museum can provide to the visitor than to deliver engaging experiences that unleash the power of art and history. By innovative use of our collections and presentation strategies, Hill-Stead Museum can provide a constant stream of fresh perspectives and authentic, powerful moments of connection, accessible to visitors of diverse backgrounds.

We will strengthen our relationship with our visitors, members, and community by promoting deeper dialogue with Hill-Stead. With more focused and effective communications, outreach, partnerships, and collaborations—all informed by a better understanding of our audiences—the museum will ensure that it is a “must-see and must-see often” destination.
**PATHWAY II. Creating Sustainability:** Take Hill-Stead’s greatest assets and apply them to philanthropy, visitation, membership recruitment, volunteer leadership, and visitor experience. Hill-Stead sustainability is not only financial. Excellence in volunteer and staff leadership recruitment and retention ensures the sustainability of the organization.

**PATHWAY III. Excellence in Governance and Team:** Hill-Stead Museum will promote excellence in leadership, fiduciary responsibility and fiscal stability. Hill-Stead will continue to engage and evolve the roles, responsibilities and expertise of staff, volunteers and standing committee members through clear and consistent governance practices. We will also strategically cultivate and recruit new and vibrant candidates. Hill-Stead will nurture a unified, inspiring and more effective internal culture, both among existing and future volunteers and staff.

Together, these three pathways help us create experiences that inspire all visitors and donors, and lead us to our goals for success.
Interpretation: Interpretation of Hill-Stead allows us to increase the visitor’s understanding of the museum’s collections, archives, historic garden and property, and public programs. It enables us to increase the number of visitors and encourages visits from new and specific audiences. Proper interpretation will lead to an increase in the length of time visitors spend at Hill-Stead, encouraging activity, interaction, and enjoyment. This interpretation leads to sustainability.

Sustainability: Sustainable organizations exhibit leadership that is visionary, strategic, inclusive, decisive, inspirational, motivational, and accountable. For Hill-Stead, sustainability is keeping the progressive visions of Theodate Pope Riddle alive by having the financial freedom to maintain relevance.
GOAL #1. Interpretation: Telling the Hill-Stead Story—ACTION ITEMS

YEAR 1: Hill-Stead will review guidelines for **re-accreditation with the American Alliance of Museums** to ensure components requiring updates will receive adequate staff support in the coming year.

YEAR 2: Hill-Stead will assemble required documentation from July 2016 through July 2017 to meet the re-accreditation deadline for the American Alliance of Museums.

YEAR 2: Hill-Stead will conduct an Interpretative Assessment to improve visitor experience and educational outreach efforts.

YEAR 3: Hill-Stead will create an **Interpretive Plan** that will be both visitor and donor centric. The final goals will inform revisions to the vision of Hill-Stead, and serve as a guide to the programs and exhibits now and in the future. Components of Hill-Stead’s Interpretative plan will:

1. Showcase Hill-Stead in its entirety. This includes: the Architecture (main house, farm complex, and out-buildings), fine and decorative art collection, landscape (gardens, trails, pond, and golf grounds), and their link to the artistic movements of the times; family stories and historic context; community events.
2. Evaluate curriculum in order to provide hands-on educational programming for school children that relates directly to current K-college curriculum standards.
3. Respond to visitors seeking an early 20th century experience.
4. Present exciting, interactive encounters with the collections and grounds, promoting how invaluable Hill-Stead is to the community.
5. Communicate, in interactive and unique ways, the stories of the Pope and Riddle families.
6. Present visitors and stakeholders with an array of experience-based opportunities.

YEAR 4: Hill-Stead will implement Phase 1 of the **Interpretive Plan**:

1. Create tiered focused and themed tour outlines to enhance the visitor experience and encourage repeat visitation through progressive experiences.
2. Train staff and volunteers to use modern interpretive methods, incorporating engaging and interactive experiences to make tours memorable.
3. Increase self-directed visitor opportunities in the museum and on the grounds through printed material and signage.
4. Partner with technology to integrate interactive components with the visitor experience.
5. Increase walk-in and adult group tour visitation through enhanced marketing efforts which promote new interpretive methods and experiences. Develop strategic partnerships with affinity groups and group tour operators to better promote and share HSM’s collection and special exhibitions.
6. Increase public and private school visitation to Hill-Stead by improving relationships with school administrators and promoting revised curriculum that meets common core standards.
CRITICAL PATH TIMELINE

7. Work with school systems to design a robust outreach program which delivers an array of engaging content on art and poetry. Content will meet Common Core state standards and closely align with existing HSM educational curriculum.
8. Seek additional grant opportunities to support visitation and outreach programming for Greater Hartford students.

YEAR 4: Complete IMLS-funded Collections Survey project.

YEAR 4: Develop a Long Term Facility and Collections Preservation Plan for Hill-Stead.

YEAR 4: Seek funding to support implementation of Long Term Facility and Collections Preservation Plan.

YEAR 5: Hill-Stead will implement Phase 2 of the Interpretive Plan:
1. Continue to train staff and volunteers to present new tiered focused and themed tours.
2. Enhance self-directed visitor opportunities in the museum and on the grounds by developing digital media, made accessible to visitors via their personal devices.
3. Continue to market new tours and visitor experiences to further increase walk-in and adult group tour visitation.
4. Continue to develop relationships with school administrators to further increase public and private school visitation.
5. Secure grant funding to support new outreach programs for Greater Hartford students.
6. Begin implementation of grant-funded and fee-based outreach programming to public and private schools.
7. Develop year-round first-person interpretive experiences and seasonal theatrical programming. Seek grant opportunities to fund these initiatives.

YEAR 5: Apply for IMLS-funded Collections Conservation Project Support. Secure funding for this one-to-one matching grant.
GOAL #2. Sustainability—ACTION ITEMS

YEAR 1: Hill-Stead will conduct a comprehensive development/philanthropy assessment and audit. The following sets forth the approach to the audit process:

1. Gather and interpret level of engagement, opinions, perceptions and views of the current state of the philanthropy program and the perceived actions necessary to achieve future goals from stakeholders and staff.
2. Conduct an internal development operations audit, evaluating all aspects of the philanthropic organizational structure (legal, volunteer and staff), internal operations, and the efficiency and effectiveness of its fundraising programs.
3. Assess the mix of annual giving, major gifts, planned giving, corporate and foundation, grant writing and special events, prospect identification/evaluation/research/rating/
4. relationship/moves management, stewardship, recognition, data base management functions of Hill-Stead.
5. Review and assess policies and procedures, roles and responsibilities of development staff, Executive Director, volunteers, and members of the management team.
6. Review and access fundraising collateral materials and donor communications, marketing, and public relations strategies.
7. Determine staff productivity levels.
9. Review the efficiency and effectiveness of the program by evaluating fundraising financial pro forma revenue and expense budgets/projections.

YEAR 1: Hill-Stead will create a comprehensive Development and Stewardship Plan that contains division strategies and goals, prospect cultivation and solicitation strategies, timetables, budgets, organizational models, roles and responsibilities, policies and procedures. The Stewardship Plan will be created to ensure that proper ongoing communication with all Hill-Stead stakeholders will be developed.

YEAR 1: Visitor, Membership, and Development communications strategies will be created along with collateral materials. These include social media presence, brochures and ancillary materials, including question-and-answer documents, facts sheet, pledge forms, ways of joining, ways of giving, and naming and recognition opportunities.

YEAR 1: Farmington Valley membership acquisition and retention plans will be developed. Membership and donor retention and loyalty begins and ends with providing real, tangible value across the stakeholder’s relationship with Hill-Stead. Hill-Stead needs to deliver an experience that meets individual needs, preferences, and desires of those within 30 minutes of the front gate.

YEAR 1: Creation and implementation of an aggressive membership plan and campaign for walk-in and property visitors.
CRITICAL PATH TIMELINE

YEAR 2: Implementation of assessment recommendations may include major gifts program, planned and estate giving, annual and un-restricted philanthropy, corporate and foundation programs, and special events.

YEAR 3: Create a new Membership Brochure which reflects updated membership categories and the design of related collateral materials.

YEAR 3: Conduct a Campaign Feasibility Study. The Campaign Feasibility Study is the foundation from which to launch any successful major fundraising initiative.

YEAR 3: Review Carriage Barn renovation plans to include rotating exhibition space, expanded museum shop, handicap-accessible restrooms and other amenities.

YEAR 4: During and upon completion of the Interpretative Plan, members of Hill-Stead's Board and staff will develop a revised Vision Statement. When appropriate, this revised document will be presented for discussion and approval by the Trustees and Board of Governors. The development of an updated vision statement is critical to the success of this Strategic Plan, the Interpretive Plan, and the forthcoming Capital and Endowment Campaign.

YEAR 4: Continue to review the efficiency and effectiveness of the fundraising program by evaluating financial pro forma revenue and expense budgets/projections.

YEAR 4: Update the Development and Stewardship Plan to reflect new tactics for corporate and major donor cultivation/solicitation.

YEAR 4: In concert with the new Interpretive Plan, develop membership acquisition methods for walk-in and property visitors which reach them at multiple points during their visit.

YEAR 4: Re-engage and expand Legacy Society and conduct one-on-one meetings to determine level of support.

YEAR 4: Define the role and capacity of Honorary Governors to serve as ambassadors and support fundraising initiatives.

YEAR 4: Begin Quiet Phase of Capital and Endowment Campaign:
1. Finalize campaign committee membership and individual roles, including honorary chairs.
2. Draft and approve Campaign Plan, to include plans for Quiet Phase.
3. Develop and implement a Public Relations Plan for the Quiet Phase of campaign.
4. Incorporating feedback from feasibility study, modify the existing Context for Conversation document to create the Case for Support document.
5. Identify naming opportunities and targeted donation.
6. Create additional campaign marketing materials, including brochure and pledge form.
7. Solicit community buy-in through public forums and small-group meetings.
8. Develop campaign-specific database and conduct prospect research/wealth screening.
9. Train and support campaign committee to conduct peer-to-peer solicitations.
10. Conduct follow-up meetings with potential campaign donors to solidify pledges.
11. Continue and complete feasibility interviews to include current and past Trustees and Board members, Legacy Society members, as well as additional prospects.
12. Complete DECD bond application.
13. Identify lead gifts.
14. Determine and secure appropriate staff to support formal campaign.

YEAR 5: Begin **Public Phase of Capital and Endowment Campaign**, with start date contingent upon successful completion of Quiet Phase:

1. Update and implement **Public Relations Plan** for the campaign and make public announcement.
2. Incorporating feedback from continued donor meetings, modify the existing **Case for Support** document.
3. Confirm intended gifts with pledge agreements.
4. Conduct campaign fundraising meetings and events.
5. Complete required grant applications for foundation support.
6. Secure additional gifts and pledges toward campaign goal.