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**NSCDA**

— PENNSYLVANIA —

*Entrusted With History's Future*

2018 - 2022 Strategic Plan

Preservation - Education - Patriotic Service



# Executive Summary

The National Society of The Colonial Dames of America in the Commonwealth of Pennsylvania (NSCDA/PA) is committed to promoting our nation's heritage through historic preservation, patriotic service, and educational projects. Our motto is *Virtutes Majorum Filiae Conservant*: Daughters conserve the virtues of their ancestors. We fulfill our mission through service to the public; all activities exist to that end.

This Strategic Plan outlines the priorities of the NSCDA/PA from 2018 to 2022, and includes longer-term goals, identifying what we want to do and how we plan to do it. We began using Strategic Planning in 2002 to organize our activities and measure our successes and, as a result, have accomplished much through our work in education, preservation, community engagement, and collaboration.

The plan reflects the role of the NSCDA/PA in the cultural life of Pennsylvania. In the field of historic preservation, the Society is a leader and innovator in historic site management and public programming. Our programs are based on the highest level of scholarship and interpretation and highlight the sites, gardens, buildings, and collections entrusted to our stewardship.

The primary emphasis of our activities is the stewardship of our museum property—Stenton. The Society took custody of this National Historic Landmark in 1899, and the site is considered a model of best practices in museum management. Programs like the *History Hunters Youth Reporter Program*, which has served more than 32,000 Philadelphia school-children, demonstrate how we can educate the public about history and engage our community in meaningful and relevant ways. We also maintain our c.1921 Headquarters House at 1630 Latimer Street in Philadelphia, and we are involved in the stewardship of Woodville, the oldest extant structure in Allegheny County, through the work of our Allegheny town committee. We support a diverse array of other programs, activities, and historic sites related to our mission including new citizens' programs, civics education for our youth, National History Day, and the Historic Germantown consortium.



NSCDA/PA members celebrate the opening of Stenton in 1900.  
*Photography courtesy of the Historical Society of Pennsylvania.*

## The Process

This plan represents an 18-month-long process led by a Strategic Planning Committee consisting of both NSCDA/PA members and staff, chaired by First Vice President Barbara Rogers. The Society, working with consultant Andy Mozenter of Concentrics, Inc., began the strategic planning effort in August 2016 following a review and evaluation of our previous plan. Over the fall of 2016, the Committee collected data from individual interviews and focus groups convened with key internal and external stakeholders, as well as an online survey of our membership.



Breakout groups share ideas during the 2017 Strategic Planning Conference at NSCDA/PA Headquarters.

On February 10th and 11th, 2017, at the Society's Headquarters, the Committee convened a Strategic Planning Conference for the purpose of engaging key stakeholders to help formulate a compelling and inspired strategic vision and multi-year plan. Forty participants representing NSCDA/PA members, staff, board members, funders, partners, and other stakeholders engaged in the discussions.

Over the next four months, the Strategic Planning Committee worked to refine the goals and priorities that emerged from this conference, and to articulate strategies under each goal, which were presented and adopted at the annual board retreat in June 2017. The Committee then appointed subcommittees to develop tactics, estimated costs, and a timeline for each strategy.

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## NSCDA/PA Strategic Planning Committee

Barbara Rogers, Chair

Anne Burnett

Kristin Cahn von Seelen

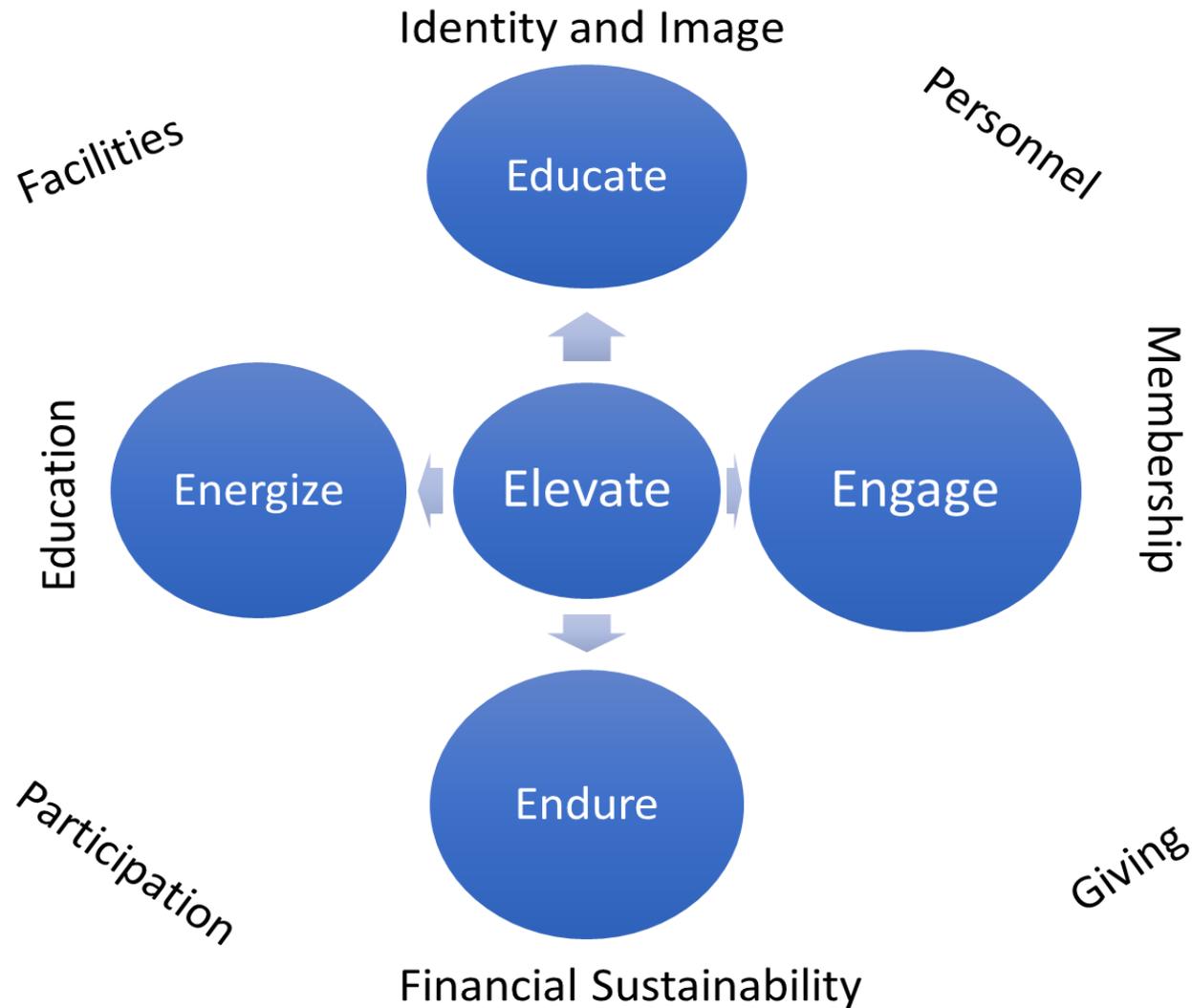
Sally Congdon

Peggy Conver

Carol Rush

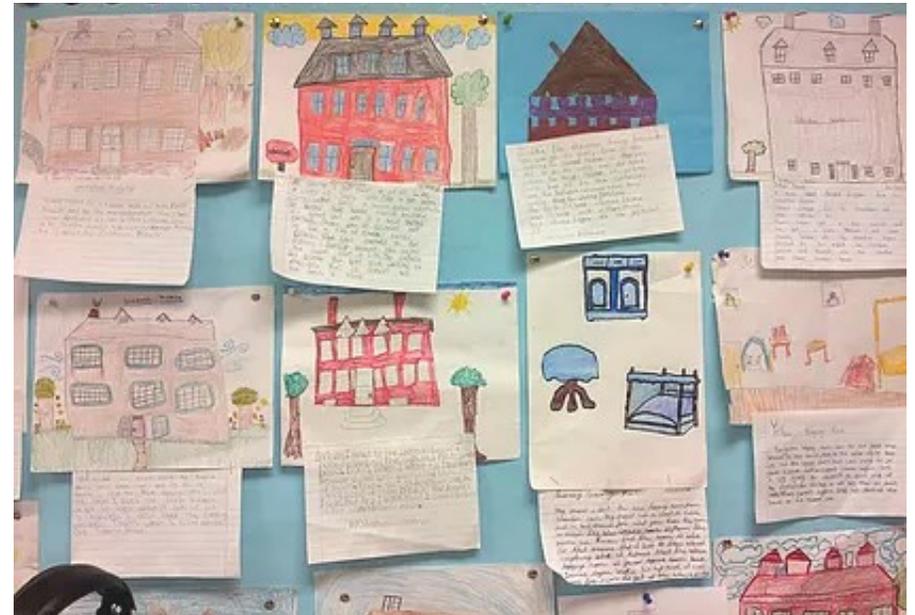
Gina Whelan

# Strategic themes that emerged from the discovery process



# Five Goals to Sustain Excellence of Purpose, Program, People, and Property

- **Elevate** our perceived stature and recognized impact;
- **Energize** and excite our members;
- **Engage** our audiences and community of stakeholders;
- **Educate** children and adults through innovative programs, partnerships, and scholarship;
- **Endure** as an organization through the preservation, stewardship, and cultivation of our physical, financial, and human resources.



*History Hunters* students use a classroom workbook with post-visit activities.



Clockwise from upper left: Group tour at Stenton; Studying Stenton's quilt collection; Family Fun at Woodville; 2017 board retreat.

# Elevate

## ✓ Strengthen our brand as regional leaders in preservation, education, and patriotic service.

1. Develop and implement a comprehensive, multi-year communication strategy, and evaluate our efforts.
2. Increase staff support for communications.
3. Leverage resources from NSCDA (National) and Historic Germantown to increase brand awareness.
4. Create brochures/materials explaining the NSCDA/PA and its mission and activities, including a new Stenton brochure.
5. Research and plan to install Pennsylvania Historical and Museum Commission historical markers for Stenton and Headquarters.
6. Publish an annual report for the Society and Stenton, and publicize the work being done at Woodville.

## ✓ Advance reciprocal partnerships with cultural and educational institutions.

1. Make the most of the promotional opportunities of our collaborative programming.
2. Build and strengthen relationships with the media.
3. Capture potential partnerships through the members skills survey and develop a follow-up process.

## ✓ Attract a wider group of community stakeholders to attend and support our programs.

1. Connect with established community organizations to promote our programs and events.
2. Leverage our partnership with Logan Elementary School to build community awareness and collaboration.
3. Evaluate and consider an advisory group that would include community stakeholders.

## ✓ Promote our commitment to inclusivity while fulfilling our mission.

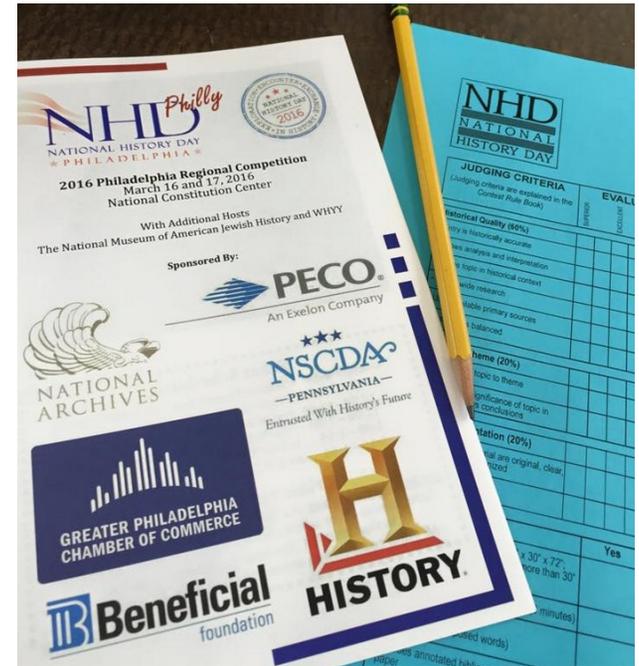
1. Promote Stenton and Headquarters as venues for hosting artistic performances, science talks, art exhibits, and other programs that will attract diverse audiences.
2. Utilize social media and community outreach to publicize the “Dinah, Deborah, and the Dames” stories.
3. Research new audiences for programs that give voice to diverse ancestors.
4. Expand the Oral History Project.
5. Expand our work of elevating the history and future role of women as it relates to our mission.



Clockwise from top: Dames participate in a shell box workshop led by Stenton's Curator; Members gather at Headquarters; Stenton Committee members are vital to the museum.

# Energize

- ✓ Strengthen and expand participation and support.
  1. Expand the membership committee and include Young Dames.
  2. Plan and implement a membership drive.
  3. Examine bylaws to streamline the membership proposal process.
  
- ✓ Orient new members and encourage engagement with programs and committees.
  1. Develop a new member handbook or insert for the NSCDA/PA binder.
  2. Enhance our website to include a webinar and thorough background information for members.
  3. Develop a new Dames orientation program and offer ongoing *History Hunters* Dames Days.
  
- ✓ Cultivate engagement and satisfaction of members of all ages through mentoring, training, and establishing new opportunities for participation at all levels.
  1. Feature younger Dames and new members in our newsletters.
  2. Expand membership anniversary recognition on “Founders Day.”
  3. Enhance personalized contact and acknowledgement of life events and plan for visiting and engaging elder members.
  4. Develop a strong mentoring program and track new member involvement for 2-4 years.
  
- ✓ Communicate our mission to inspire volunteerism and participation.
  1. Develop (job) opportunities for new member orientation and incentivize participation for existing members.
  2. Explore the possibility of a web-based, socially-interactive rideshare program to encourage attendance.
  
- ✓ Develop leadership succession plans for all positions and committees.
  1. Strengthen our candidates for the board and to increase participation on all committees.
  2. Develop and maintain ongoing fiduciary and leadership training of board members and chairs.



Clockwise from top left: Visitors enjoy Stenton's annual holiday tea; The NSCDA/PA sponsors National History Day and provides judges; The Stenton Easter Egg Hunt attracts hundreds each year.

# Engage

## ✓ Expand partnerships with others involved in preservation, education, and/or patriotic service.

1. Maintain and strengthen our partnership with Historic Germantown.
2. Seek and expand existing partnerships with Germantown and Center City neighbors, other museums, women's organizations, universities, and the Preservation Alliance.
3. Maintain and expand upon our partnership with National History Day.

## ✓ Provide educational opportunities/internships for students interested in mission-related fields.

1. Scholarships – Support existing or create new scholarships that can nurture the next generation of stewards.
2. Internships – Fund a paid internship or fellowship for college or graduate students.

## ✓ Publicize the use of NSCDA/PA museum properties and facilities to community groups and other preservation and lineage groups.

1. Continue to offer free seasonal programs at Stenton.
2. Offer the use of Stenton's green space to local schools and community organizations.
3. Have a Dame sit on the board of Historic Germantown.
4. Partner regularly with Stenton Park.
5. Reach out to local preschools to develop a story time program.

## ✓ Advocate for other historic groups locally and regionally.

1. Develop an Advocacy Mechanism (i.e. committee), and strengthen connections with NSCDA (National) around advocacy issues related to preservation and museum funding.
2. Explore how the Dames can help/support the Philadelphia Historic Inventory.



Clockwise from top left: Poetry workshop at Stenton; Neighbors discuss a new Dinah memorial; History Hunters students at the Johnson House, and in costume.

# Educate

✓ Expand our award-winning school-age programs and develop public programs with broad appeal that are clearly linked to our mission.

1. Conduct annual evaluations of our programs to ensure quality and impact of offerings.
2. Collaborate with Historic Germantown to expand *History Hunters* to Middle School and other subject areas.
3. Continue to provide training, specifically racial competency training and other learning experiences for Historic Germantown, Stenton Guides, and Dames.
4. Create ways to keep in touch with past *History Hunters* students, i.e. creating a Facebook group/page.
5. Explore packaging the *History Hunters* model for sharing with the NSCDA (National) Museum Alliance, and copyright the *History Hunters* brand.
6. Use technology and web-based platforms to develop outreach programs for students.
7. Lift up/strengthen the story of servants and slaves and focus more on women's history in our programs.

✓ Deepen our educational and community impact by revising and enhancing our interpretive plan and our public presentation.

1. Reinvigorate our “Deborah, Dinah, Dames” story through programming, academic research, and public presentation; include the Dinah Memorial Project and “Worlds of Deborah Norris Logan” exhibition and project.
2. Continue to actively collect and exhibit objects that are aligned with our Collections Policy, specifically:
  - Acquire a set of maple side chairs for the Yellow Lodging Room;
  - Accept, catalogue, and develop a special exhibit about the Logan objects from Loudoun;
  - Explore bringing Philadelphia History Museum Logan objects to Stenton on long-term loan.
3. Continue to build programming around archaeology and learn more about objects excavated from the site in our collection.
4. Incorporate the Logan Memorial into site interpretation.
5. Interpret the Logan Burial Ground.



Philadelphia school children explore the La Salle University Art Museum collections as part of their participation in *History Hunters*.

# Educate

✓ Strengthen and promote programs through partnerships and share expertise to deepen our educational impact.

1. Continue to maintain, prioritize, and manage robust reciprocal relationships with a select group of local universities/colleges.
2. Partner with larger museums to collaborate on programs and marketing.
3. Work with partners to develop and host specialized symposia and conferences, including co-hosting the Mid-Atlantic Plantations Conference in 2019.
4. Form a committee and advance a plan for participation in milestones, including the 2026 Sestercentennial (250th anniversary), and the 100th anniversary of NSCDA/PA Headquarters in 2021-22.



Stenton's Yellow Lodging Room after its restoration was completed in 2018.



Stenton museum (left) and service wing (right) where programs are held.

# Endure

- ✓Develop and implement five- and ten-year financial and facilities master plans.

## Stenton Museum and Grounds

1. Develop and implement a plan that will sensitively renovate the Stenton Wing to address administrative, programming, and visitor service needs.
2. Plan for and implement landscaping improvements associated with the Wing project.
3. Study and replace the mansion (museum) roof.
4. Develop long-range cyclical maintenance planning and budgeting.
5. Repair the Log House and upgrade heating/cooling system.
6. Replace security and fire alarm systems and upgrade computers and telecommunications equipment.
7. Install the Logan Memorial.
8. Increase budget as needed for the garden and meadow, plant the perimeter screen, and establish woodland walk.
9. Install new exterior lighting.
10. Replace the perimeter fence.

## Headquarters

1. Study the feasibility of replacing the elevator and renovating bathrooms for handicapped access.
2. Replace windows in the caretaker's apartment and back stairs.
3. Upgrade computers and telecommunications equipment.
4. Install a new public address system.
5. Study the feasibility of installing a zoned HVAC system.
6. Complete cataloguing of the library and secure additional shelving and flat files.
7. Continue scanning NSCDA/PA member records.
8. Lower the garden stage and repair courtyard paving.
9. Repair the brick streetscape and install a curb cut for drop-off and deliveries.



# Endure

## ✓ Steward our historic buildings, artifacts, and landscapes.

1. Evaluate textiles and objects in storage, including the “spinning collection,” for deaccessioning.
2. Evaluate exhibit uses in barn to optimize its programmatic and teaching potential.
3. Consider conservation of objects and professional photography, as necessary.
4. Prepare the PastPerfect collections database to go online.
5. Create and implement a plan for the Logan Cemetery.
6. Analyze and repaint the Blue Lodging Room as part of the “Deborah, Dinah, Dames” project, consider other paint analysis.
7. Explore the feasibility of restoring the c1790 kitchen fireplace to working condition.
8. Ensure project budgets include adequate contingencies and reserves for continued maintenance of our physical plant.
9. Continue to foster strong relationships with Fairmount Conservancy and the City of Philadelphia.



NSCDA/PA Headquarters located in Center City, Philadelphia.

# Endure

## Financial Resources

- ✓ Ensure financial sustainability of the NSCDA/PA by securing the resources needed to enhance our programs and address our facilities needs.
  1. Coordinate fundraising efforts to meet the mission of the Society, and align long-range fundraising with our strategic plan.
  2. Build a flexible 3-5 year budget and funding plan that addresses the prioritized initiatives of the Strategic Plan, and consider a combined campaign to raise funds for the Stenton Wing/Headquarters improvements.
  3. Continue the James Logan Award dinner to raise operating and program support for Stenton.
  
- ✓ Reduce dependency on our investments and increase earned income.
  1. Annually review the state of our invested funds and our investment and spending policy.
  2. Evaluate the chart of accounts and modify to meet reporting requirements.
  3. Promote member usage of Headquarters for income-producing events.
  4. Encourage corporations and other non-profit organizations to rent/use Headquarters.
  
- ✓ Enhance member and supporter engagement and offer a variety of giving opportunities.
  1. Provide a personal annual (calendar) giving summary to all members for all financial and in-kind contributions.
  2. Plan and implement major gifts and planned giving programs, and develop a plan to engage the Friends of Stenton.
  3. Investigate more effective use of iDames or other donor relations software.
  4. Create an individual development plan for all members of the Board of Managers.
  
- ✓ Explore roles for non-lineage partners in our networks, projects, and planning.
  1. Investigate successful models of other State Societies' inclusion of non-voting advisory groups and associate members.
  2. Identify specific and significant roles for selected Society patrons.
  3. Explore ways to involve daughters-in-law to encourage next generation of Dames.

# Endure

## Human Resources

- ✓ Strengthen and align our committees with our strategic plan.
  1. Combine the existing property and garden committees to form an integrated Capital Projects Committee responsible for evaluating, prioritizing, and managing projects.
  
- ✓ Revise and update roles and job descriptions for all current paid positions and implement goal-setting, professional development, and periodic evaluations for all employees.
  1. Expand the Facilities Manager's role to include the management of all Dame's properties.
  2. Practice wise recruitment and retention of professional staff who are appropriately compensated, evaluated, and appreciated.
  
- ✓ Strengthen our fundraising capacity by identifying and developing future leadership and increasing staff support as required.
  1. Explore more effective ways to learn about individual members and their interests and skills.

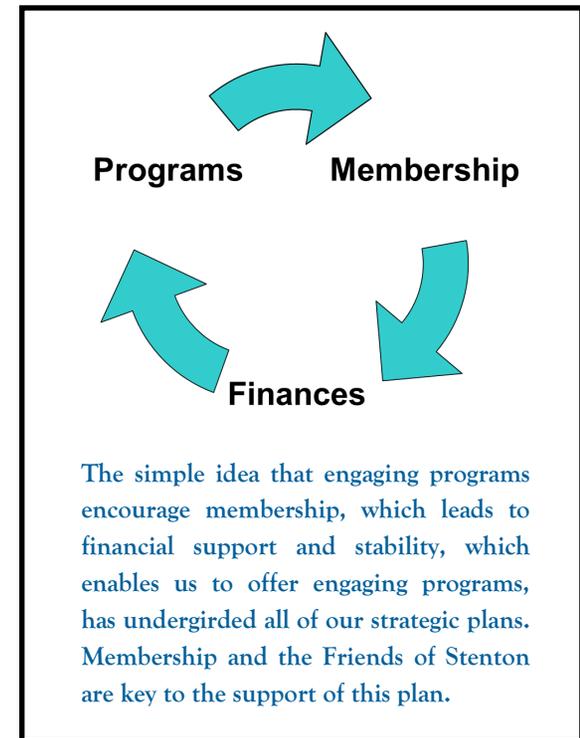


Stenton was the recipient of the Garden Club of America's Founders Fund Award in 2015. The award supported the planting of a meadow on the site.

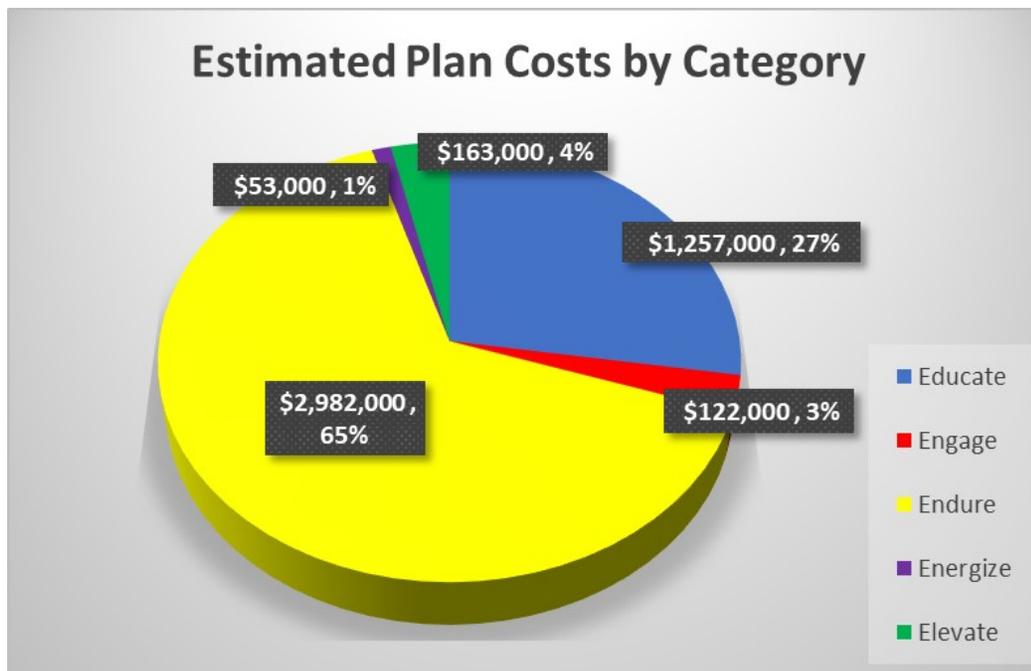
# Financial Resources

The 2018-2022 Strategic Plan is ambitious, with an estimated \$4.6 million in total expenses over the next ten years, but our Society has a strong track record of accomplishing its goals, having achieved more than 90% of the priorities outlined in recently-completed plans. We look forward to the challenges that this most recent strategic plan puts before us.

The overwhelming majority of the expenses will fund the expansion of educational and public programs, collections and interpretation projects, and preserving and upgrading our historic structures and facilities. Major projects include renovating Stenton's service wing, to provide dedicated educational program and visitor service space for the first time ever, as well as accessible restrooms and entryways, and office space for staff. Updating and improving our Headquarters, while maintaining the historic structure and integrity of the building, is another priority.



This plan also emphasizes the importance of community engagement. Stenton was recently awarded a major grant from the Pew Center for Arts and Heritage for the project, *Inequality in Bronze*. The goal of this project is to work with community members to create a new memorial to Dinah, a once-enslaved woman who lived and labored at Stenton. We will continue to focus on developing innovative programs that engage our neighbors in the future, which will help Stenton remain relevant in the 21st century.





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