
GENERAL LEW WALLACE
STUDY AND MUSEUM

STRATEGIC PLAN
September 2003



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Introduction

The strategic plan of the General Lew Wallace Study and Museum (“Museum”) was created with input from the Study’s advisory board and staff. This is the first strategic plan adopted by the organization during its long history as a city entity. The staff and board anticipate that this tool will be instrumental for the future development and financial stability of the Museum. As a National Historic Landmark, the Museum is significant to American history and will benefit from a strong governance body and structured managerial approach.

History of the Organization

General Lew Wallace's Study has always been a monument to his belief in life-long education and a reflection of his dreams. Typical of most of his endeavors, his self-taught knowledge of architecture gave him the tools to design the study himself, just as his readings in military tactics informed his actions as a Civil War officer and his study of grammar formed the foundation for his novels. In building his Study, he created the tranquil space to fulfill his wishes for his last years: to read, to think, but most of all, to write.

For 34 years after Lew Wallace's death (1905), the Wallace family maintained the Study and kept it open to the public. Of great interest to many visitors were the original manuscripts of *The Fair God*, *Ben-Hur*, and the *Prince of India*, as well as his Civil War memorabilia, his art, and his book collection. After the death of Lew Wallace grandson Lt. William Noble Wallace during World War I, the Study also collected items pertaining to the war and memorials to Lt. William Wallace.

As a private museum, the Study did not have regular hours or admissions fees. The first custodian, Walter Elliott, who maintained the building and grounds until his death in 1933, allowed visits at any hour of the day or night. A small booklet describing the items in the Study was available as a guide. Attendance increased in the late 1920s with the release of a silent film version of *Ben-Hur* in 1925 and the promotion of the Pikes Peak Ocean to Ocean Highway through Indianapolis.

After the death of the General's son, Henry Lane Wallace, in 1926, there were some legal disputes about ownership of the Study and its contents between the City of Crawfordsville and the General's surviving grandson, Lew Wallace, Jr. The Study remained open to the public during this time. In 1933, Horace F. Harvey became the custodian and curator until economic difficulties forced the Study to close its doors in 1939.

However, the Study was soon reopened through a gift from the board of the Community House for Women and Girls. This "women's club" had recently sold their building so that a new post office could be built and was looking for a new home. Combining a sense of duty to preserve Wallace history and the possibility of remodeling the General's carriage house as a new facility for the organization, the board purchased the Study and its grounds from Lew Wallace, Jr. for \$7,500. The property was then turned over to the City of Crawfordsville to be maintained as a "historic shrine" to Lew Wallace. The site was governed

by a seven member board made up of three members of the Community House, three from the city administration, and the president of the Montgomery County Historical Society. The carriage house was remodeled and became the "Susan E. Wallace Little House." Girl Scouts and later Campfire Girls used the house for meetings. In October of 1941, the Study reopened with Katherine Rowland as curator and with an admission fee of 25 cents for adults and 10 cents for children.

Visitation increased throughout the 1960s, launched by the 1959 movie version of *Ben-Hur*, starring Charlton Heston and Haya Harareet. Just a few months before the release of the film, the City of Crawfordsville proclaimed November 14, 1959, Ben-Hur Day, for the 79th anniversary of the publication of the novel. The event included multiple speakers, an essay contest for local students, a parade, and a viewing at the Study of the original Ben-Hur manuscript, on loan from the Lilly Rare Books Collection at Indiana University¹. With interest in *Ben-Hur* renewed, the Lew Wallace Study also became known as the Ben-Hur Museum. Additionally, in 1963, markers were placed on the grounds by the Indiana State Civil War Centennial Commission to honor Lew Wallace and by the Dorothy Q. Chapter of the DAR to honor David Wallace, sixth governor of Indiana and Lew Wallace's father.

In 1976, the Study was placed on the National Register of Historic Places and, in 1977, it gained National Historic Landmark status. For the centennial celebration of the publication of Ben-Hur in 1980, many groups contributed to a two-week long series of lectures and events, including a chariot race, screening of the 1959 film, a symposium drawing national speakers, and a book signing of the recently released biography, *Lew Wallace: Militant Romantic*. A sizable collection of articles about Lew Wallace was published by the Journal Review, sponsored by local businesses.

The late 1980s and early 1990s saw promotion of the Study through an annual festival, first, the Circus Maximus, inspired by the Roman setting of *Ben-Hur*, and later, the Lew Wallace Civil War Days. In 1991, Lew Wallace's three living great grandchildren attended the celebration of 50 years of ownership by the City of Crawfordsville. The 1990s were also marked by Charlton Heston's visit to the Study in 1993 and the completion of various restoration and accessibility projects.

The future of the General Lew Wallace Study and Museum is exciting and full of new programming, preservation projects, and more. The museum board began strategic planning in July of 2003. The following document is the result of their efforts and will guide the future

¹ Lew Wallace, Jr. sold the *Ben-Hur* and *The Fair God* manuscripts to Eli Lilly whose personal collection formed the foundation of the Lilly Rare Books Collection. The *Prince of India* manuscript is now housed in the Ramsey Archives at Wabash College.

direction of the staff, board and volunteers. The document is essentially a five-year plan, with a dynamic action plan guiding daily efforts.

Curators of the General Lew Wallace Study (Ben-Hur Museum)

1900-1933	Walter Dorman Elliott
1933-1939	Horace Harvey
1941-1944	Katherine M. Baylis Rowland
1944-1946	Ethel S. McCulloch
1947-1957	Daisy Goodman
1958-1972	Inez Cunningham
1972-1977	Kathleen Patterson
1978	Edward Kucinski
1979-1980	Rita Weliver
1980-1982	Edward Kucinski
1983-1986	Mildred Moore
1987	Betty Rich
1988-2003	Joann Spragg
2003 – present	Cinnamon Catlin-Legutko

Vision Statement

The General Lew Wallace Study and Museum is a locally, nationally, and internationally significant historic site and educational resource that is deeply committed to the community and to the protection and preservation of Lew Wallace history for generations to come.

Mission Statement

The General Lew Wallace Study & Museum celebrates and renews belief in the power of the individual spirit to affect American history and culture.

Revised Spring 2005

General Lew Wallace Study & Museum Board of Trustees

Strategic Goals

Education

- ◆ Expand public knowledge of Lew Wallace history, the building and grounds
- ◆ Develop collaborations with local and state organizations, including area school systems
- ◆ Develop an active exhibits program

Preservation of Building and Grounds

- ◆ Preserve historic structures
- ◆ Interpret grounds according to historical records

Development

- ◆ Maintain realistic and effective annual budget
- ◆ Recruit volunteers with skills and interests necessary to meet the strategic goals of the Museum
- ◆ Promote community use of the grounds and regular visits to the Museum

Collections

- ◆ Improve collection storage and exhibit environment
- ◆ Align collection management procedures with American Association of Museums standards
- ◆ Create active loan and collecting program

Administration

- ◆ Establish museum identity
- ◆ Open Carriage House Interpretive Center to the public
- ◆ Establish board governance that is reflective of the strategic plan and enables its success
- ◆ Improve web presence
- ◆ Improve accessibility to the site
- ◆ Revise and create policy to guide museum administration

Evaluation

The strategic plan will be reviewed annually for efficacy. Through consensus of the board and staff, adjustments to the plan will be made as barriers are realized. Recommendations for adjustments shall be made in writing and submitted during regular board meetings.

After a period of one year from the approval date, suggestions will be solicited from community leaders, educators, and volunteers. The public review process will provide necessary feedback from the Museum's audience, which will encourage the board and staff to re-examine the plan for effectiveness. This public forum approach is usually considered during the initial development of the strategic planning process, however, this is the first of such plans for the organization. Currently, there is very little programming, development or active preservation taking place at the Museum. Previous efforts have focused on research and care taking. The goals introduced in the plan require a significant increase in resources, and the staff and board need time to adjust to the newly established goals to successfully participate in the solution.

Implementation Schedule

The five goal categories have been broken into a schedule for implementation with several elements: goal, solution, steps, responsibility, deadline and priority level. Names and groups designated in the “responsibility” category are subject to change. Where applicable, the first or only name listed is the lead person on the project. Other participants may be added at his/her discretion.

The priority levels supersede the deadline dates. For example, if a project has a deadline of Fall 2003 and a priority level 3, it will wait until appropriate resources are available and/or higher priority level projects are finished.

Task Lists

The Implementation Schedule has been organized into annual task lists. This will contribute to the timely completion of projects.

2003

Summer

- ◆ Recruit experts, teachers, and volunteers to help in developing a formal educational program
- ◆ Expand educational outreach to include off-site programs using objects as visuals
- ◆ Give formal presentations at social, hobby, professional, and other groups
- ◆ Collaborate with educational, recreational and tourism groups
- ◆ Expand grant solicitation at local, state and national levels
- ◆ Recruit volunteers through mailings
- ◆ Establish museum identity by changing name to General Lew Wallace Study and Museum
- ◆ Obtain improved signage

Fall

- ◆ Enhance student/youth visitation experience through structured programs
- ◆ Develop Strawberry Festival programming
- ◆ Collaborate with Visitor's Bureau – locals bring guests to “show off” Study
- ◆ Establish uses of Carriage House
- ◆ Place ironwork in storage
- ◆ Create Development Committee
- ◆ Target audiences relative to different aspects of Lew Wallace history
- ◆ Direct solicitation mailings
- ◆ Define Parks and Recreation budget to reflect actual spending at site
- ◆ Volunteer job descriptions and reach out to social, hobby, and professional groups
- ◆ Locate grant funding for web site and begin re-design efforts
- ◆ Discuss board re-structuring opportunities

Winter

- ◆ Set preservation priorities and create preservation plan for site

- ◆ Initiate NPS assessment for Study
- ◆ Seal Study foundation and porch
- ◆ Explore benefits of Society membership
- ◆ Informational mailings and meetings to position Study in the community
- ◆ Propose annual Society budget
- ◆ Develop Lew Wallace Festival concept
- ◆ Author and approve agreement with the City to recognize Society board as Study governance
- ◆ Revise Society by-laws and inform membership and public of board re-structure
- ◆ Identify appropriate number of board members and begin nominating process
- ◆ Initiate board term limits
- ◆ Identify appropriate committees and chairpersons, including nominating committee
- ◆ Develop acquisition budget
- ◆ Apply for CAP grant

2004

Spring

- ◆ Tie in with Hispanic community and other ethnic groups
- ◆ Develop incoming loan program
- ◆ Use technological tools for outreach, e.g. laptop, LCL projector
- ◆ Begin restoration of the Carriage House
- ◆ Annual membership drive
- ◆ Create planned giving materials and give to key individuals in the community
- ◆ Determine steps to increase annual visitation
- ◆ Develop sponsorships for projects, e.g. conservation of specific pieces
- ◆ Recruit volunteers through advertising
- ◆ Move collection off-site
- ◆ Develop collection policy and registration forms
- ◆ Develop loan policy
- ◆ Develop Ethics policy
- ◆ Determine hours for gates to be open extended hours and notify public
- ◆ Explore increasing visitation hours and allocate funding for labor

Summer

- ◆ Begin interpreting grounds with programming and signage
- ◆ Use docents in period dress

Fall

- ◆ Develop summer camps and year round workshops and programs
- ◆ Develop docent corps
- ◆ Develop curriculum for use in the classroom that reflect academic standards for Indiana
- ◆ Encourage multiple visits from different age groups
- ◆ Create driving tour of the county in collaboration with related historic sites
- ◆ Draft marketing plan to promote community use of the grounds and regular visits to the Museum
- ◆ Allocate rental fees for temporary off-site storage
- ◆ Formalize disaster preparedness plan and emergency procedures
- ◆ Formalize exhibit policy
- ◆ Author charters for Board of Trustees committees

Winter

- ◆ Use website for educational materials and virtual exhibits
- ◆ Explore Country Club connection and develop history of site and use their space for presentations, traveling exhibits, etc.
- ◆ Annual Society budget
- ◆ MAP II assessment
- ◆ Identify additional appropriate administrative policies

2005

Spring

- ◆ Complete Carriage House Interpretive Center
 - ◆ Re-locate non-period collection to Carriage House using appropriate storage furniture
 - ◆ Create a dedicated educational space in the Carriage House
 - ◆ Promote community use of the carriage house as a meeting space
 - ◆ Relocate gift shop, administration, and video presentation to Carriage House
- ◆ Restore Study to circa Lew Wallace

- ◆ Fix and seal basement (including walls and steel) in the Study
 - ◆ Develop a master plan for the grounds including tree plan and replacement schedule
 - ◆ Expand gift shop inventory
- Summer
- ◆ Develop grounds by cultivating gardens circa Lew Wallace, developing outdoor exhibits, designating Old John's grave, and excavating moat and reflecting pool
- Fall
- ◆ Develop an education collection through donation and acquisition for use in discovery kits
 - ◆ Develop hands-on exhibits
 - ◆ Expand exhibits by borrowing from locals and collectors
 - ◆ Create an incoming loan program from other museums
- Winter
- ◆ Allocate funds for acquisitions
 - ◆ Establish fund with Montgomery County Community Foundation
 - ◆ Determine annual goals for endowment
 - ◆ Formalize collecting plan
 - ◆ Formalize conservation plan
- 2006**
- Spring
- ◆ Develop scale model of grounds at the Carriage House for interpretation of site changes
 - ◆ Repair and seal wall
 - ◆ Commission ironwork restoration or replicas
 - ◆ Commission clothing replicas
 - ◆ Gain documented title to the collection following Indiana museum property law and utilizing registration forms with proper signatures
 - ◆ Institute regular inventories of collection
 - ◆ Formalize complete catalog of collection including photo-documentation
- Summer
- ◆ Continue development of grounds by identifying pathways through gardens and effective signage for the arboretum

Fall

- ◆ Employ CD-ROM technology to create interactive preparation and follow-up for visits

Winter

- ◆ Establish a collections committee
- ◆ Formalize deaccession policy

2007

There are no formal tasks for this year, although it is the fifth year of the plan. The museum hired its first professional staff member in the spring 2003 and the majority of this plan includes new approaches and directions for the board and staff. With the limited staff time available (2 part time staff members), keeping 2007 open will allow for realistic timelines, if the extensions are needed. A new strategic plan should be developed in September of this year.

Action Plans

A template has been provided for the construction of Action Plans. Each responsible party is to draft the plan and delegate responsibilities where necessary. The table includes: solution, step, action steps, timeline to completion, responsible parties, costs, and outcome measurements.

As each plan is developed, the board is to be provided a copy for inclusion in their strategic planning binder. If a change is needed in the Implementation Schedule, the change should be defined in the form of an Action Plan and circulated as such.

Task List Update

This list is pulled directly from the strategic plan and it offers an update of our progress. It should be noted that many of these tasks are ongoing. Board approval: 1/28/08.

Key: *Italicized* tasks were added during the 2006 revision. Underlined tasks have been given new timelines.

2003

Summer

- Recruit experts, teachers, and volunteers to help in developing a formal educational program
- Give formal presentations at social, hobby, professional, and other groups
- Collaborate with educational, recreational and tourism groups
- Expand grant solicitation at local, state and national levels
- Recruit volunteers through mailings
- Establish museum identity by changing name to General Lew Wallace Study and Museum
- Obtain improved signage

Fall

- Enhance student/youth visitation experience through structured programs
- Develop Strawberry Festival programming
- Establish uses of Carriage House
- Place ironwork in storage
- Create Development Committee
- Direct solicitation mailings
- Define Parks and Recreation budget to reflect actual spending at site
- Volunteer job descriptions and reach out to social, hobby, and professional groups
- Locate grant funding for web site and begin re-design efforts
- Discuss board re-structuring opportunities

Winter

- Initiate NPS assessment for Study
- Seal Study foundation and porch
- Explore benefits of Society membership
- Informational mailings and meetings to position Study in the community
- Develop Lew Wallace Festival concept
- Author and approve agreement with the City to recognize Society board as Study governance
- Revise Society by-laws and inform membership and public of board re-structure
- Identify appropriate number of board members and begin nominating process
- Initiate board term limits
- Identify appropriate committees and chairpersons, including nominating committee
- Apply for CAP grant

2004

Spring

- Use technological tools for outreach, e.g. laptop, LCL projector
- Begin restoration of the Carriage House
- Annual membership drive
- Develop sponsorships for projects, e.g. conservation of specific pieces
- Recruit volunteers through advertising
- Move collection off-site
- Develop loan policy

Summer

- Begin interpreting grounds with programming and signage

Fall

- Develop summer camps and year round workshops and programs
- Develop docent corps
- Develop curriculum for use in the classroom that reflect academic standards for Indiana
- Encourage multiple visits from different age groups

Draft marketing plan to promote community use of the grounds and regular visits to the Museum

Allocate rental fees for temporary off-site storage

Author charters for Board of Trustees committees

Winter

Propose annual Society budget

- Acquisitions line item needed in annual budget
- Audit Committee needed

Use website for educational materials and virtual exhibits

Explore Country Club connection and develop history of site and use their space for presentations, traveling exhibits, etc.

- All efforts on hold due to devastating fire

Identify additional appropriate administrative policies

2005

Spring

Expand gift shop inventory

Initiate use of community advisory groups

- Centennial Committee used for Centennial Celebration
- League of Women Voters formed Wallace Women Committee

Summer

Determine hours for gates to be open extended hours and notify public

Explore increasing visitation hours and allocate funding for labor

Fall

Formalize a long range Education Plan

Winter

Develop collection policy and registration forms

Establish a collections committee

2006

Spring

Complete Carriage House Interpretive Center

Re-locate non-period collection to Carriage House using appropriate storage furniture

Create a dedicated educational space in the Carriage House

- Promote community use of the carriage house as a meeting space
- Relocate gift shop, administration, and video presentation to Carriage House
- Develop a Value Assessment of Crawfordsville museums and share with stakeholders*
- Develop an education collection through donation & acquisition for use in discovery kits
 - Wallace Women discovery kit unveiled 3/19/07

Summer

- Continue development of grounds by identifying pathways through gardens and effective signage for the arboretum
- Develop exhibits program and define interpretive message*
- Create 5-year exhibits calendar based on annual themes (programming tie-ins)*
 - Draft Exhibits Policy still needed

Fall/Winter

- Expand educational outreach to include off-site programs using objects as visuals

2007

Spring /Summer

- Develop incoming loan program
- Develop hands-on exhibits
 - To be introduced with *Lew Wallace - Gentleman Scientist* exhibit

Fall/Winter

- Develop Ethics policy
- Formalize disaster preparedness plan and emergency procedures
 - Half of the plan has been drafted, to be finished in 2008
- Develop a master plan for the grounds including tree plan and replacement schedule
 - Tree inventory complete, assessment in process
- MAP Assessment – Collections Management
 - Team formed; self assessment still to be completed

2008

Spring/Summer

- Create planned giving materials and give to key individuals in the community
 - Museum Studies Intern to complete this during spring semester
- Reconcile catalog records, inventory records, photograph records and locations

1. Gain documented title to the collection following Indiana museum property law and utilizing registration forms with proper signatures
 - o 2006 summer intern did full review of collection; only need to gain title to 7-8 items; to be completed summer 2008
2. Institute regular inventories of collection
 - o Archival collection and stored objects have been inventoried and a Wabash work study student is doing data entry during spring semester
3. Formalize complete catalog of collection including photo-documentation
 - o Applied for Alderson Internship Grant – notification made spring 2008 – if awarded, this will pay for a graduate student to work on the collection in the summer of 2008

BEYOND CURRENT SCOPE

As we have worked through the current strategic plan, it is apparent that the following projects will not be completed by the end of the plan in September 2008. Funding limitations will require that these projects be explored in the next strategic plan.

- Initiate Endowment Campaign
- Restore Study to circa Lew Wallace
- Fix and seal basement (including walls and steel) in the Study
- Repair and seal wall
- Commission ironwork restoration or replicas
- Develop grounds by cultivating gardens circa Lew Wallace, developing outdoor exhibits, designating Old John's grave, and excavating moat and reflecting pool
- Create driving tour of the county in collaboration with related historic sites
- Tie in with Hispanic community and other ethnic groups
 - o Initial contacts made in 2004, looking for opportunities now
- Employ CD-ROM technology to create interactive preparation and follow-up for visits
- Set preservation priorities and create preservation plan for site
- Develop collections management plan
- Formalize collecting plan
- Formalize conservation plan
 - o Commission clothing replicas