



Naper Settlement
Mission-Driven Strategic Planning
 Engagement Timeline and Scope of Work
 Updated December 18, 2023

I. ASSIGNMENT & SCOPE OF WORK

A. Assignment

Davidoff Mission-Driven Business Strategy (Davidoff) will design and facilitate a *Mission-Driven Strategic Planning* process, engaging select staff, leadership, and key stakeholders to revisit and update Naper Settlement's current strategic plan. The resulting plan will update existing priorities and/or surface new priorities that will guide the organization over the next five years. The final written strategic plan will include some or all of the following components:

- Necessary refinements to Naper Settlement's organizational vision, mission, and an overarching goal/vision for the strategic plan
- Updates to existing and/or new strategic priorities, including five-year outcome statements, success metrics, and objectives articulating where Naper Settlement will focus over the next five to ten years
- Considerations for operationalizing the strategic plan and managing the plan's implementation

B. Overview: *Mission-Driven Strategic Planning Process*



**The addition of incremental discovery phase components may extend the timeframe for this phase of work and the overall timeline*

Strategic Priorities: Five Year Goals, Success Metrics, & Objectives

A. Context for Strategic Priorities Goals, Success Metrics, & Objectives

Five-Year Goals & Success Measure

- Specify what will be accomplished in each strategic priority area by the end of the five-year strategic plan time horizon
- Define what success looks like for each priority, how we will know when we have achieved success, and how we will measure it

Strategic Milestone Objectives

Objectives break the outcome statement down into incremental activities and sub-strategies that will contribute to reaching the overall outcome.

- Include a combination of incremental goals and activities
- Indicate when goals are met, or activities are accomplished
- Bridge the gap from high-level strategies to operationalized tactics

B. Strategic Priorities Discussion Prompts

Use the following discussion prompts, as well as the tables on the following pages, to guide your breakout discussions.

1. What does success look like for each strategic priority at the end of five years?
2. How will we know we have achieved success?
3. What are the key strategic objectives that are essential to achieving the five-year outcome for each assigned priority?

C. Strategic Priorities Discussion Context

Strategic priorities outline the critical, high-level initiatives Naper Settlement will focus on over the next five years, in support of its vision and mission. Strategic priorities:

- Relate back to the SWOT, leveraging strengths & core competencies, addressing weaknesses, taking advantage of opportunities and mitigating threats.
- Respond to and/or anticipate client needs
- May be internal and/or external
- Representative of work that is critical to the success of Naper Settlement's mission and vision within the specified time horizon
- Reflect what is within Naper Settlement's sphere of influence, expertise, and action

D. Strategic Priorities Discussion Prompts

Please use the following discussion questions to guide your group conversation. Feel free to take notes below.

1. Which of these are still relevant?
2. What additional strategic initiatives or areas of focus does Naper Settlement need to prioritize over the next five years to achieve its North Star vision?
3. What initiatives does Naper Settlement need to de-prioritize in order to be able to focus on higher priority efforts?

2031 Vision

Deliver an immersive, experiential campus of lifelong learning, and discovery for all by 2031

Five-Year Vision Summary: 2017-2023

Naper Settlement is acknowledged regionally-and nationally-as a prime tourist attraction and key historical and educational site in northern Illinois.

Strategic Initiative #1 Economic Engine	Strategic Initiative #2 Lifelong Learning	Strategic Initiative #3 Institutional Memory	Strategic Initiative #4 Desirable Investment
Strengthen our role as an economic engine for the City of Naperville and State of Illinois and become a household name.	Become a leading resource for lifelong learning.	Serve as the Institutional memory of Naperville and the region by sharing our stories through innovative engaging experiences that connect us to community.	Establish ourselves as a viable and desirable investment in order to successfully fundraise locally and nationally in support of operational and capital needs.
❖ Significant tourist attraction ✓ Christkindlemarket to be held at Naper Settlement Nov-Dec ❖ Partnering with businesses ✓ 20 sponsors signed for 2016 after 1st quarter with value of \$80,000 ❖ "Top of mind" community resource	❖ Technology infrastructure ❖ Sought after educational resource ✓ School services provided on 96% of available school days;84% of the available days Naper Settlement filled to max capacity –October 2015-May 2016 ❖ Diverse & inclusive program ❖ Innovator in museum experiences/education ✓ Pioneers to Mars Space Camp to be offered in July 2016	❖ Fostering community engagement ✓ 6 oral histories completed Jan-March 2016 in support of Ag Center ❖ Utilizing collections daily ❖ Connecting Local history to national story	❖ Increase operating revenue ❖ Secure capital funding ✓ Case Statement presented to NHS Board in April ❖ Fundraising infrastructure in place ✓ Reorganization of board committee and staff structure completed ❖ Recognized museum experts ✓ Staff served as: AAM Accreditation reviewer, IL chair for AASLH Leadership Awards, AASLH Council (Board) member, AASLH Committee on Standards and Ethics member. Presenters at national, regional, and state conference, governor appointee to Illinois State Museum Board
Strategic Initiative #5 Operational Excellence Maintain best management practices in accordance with museum accreditation, municipal code and requirements, and nonprofit standards. Develop effective working relationships for new committees			