



THE HOUSE OF THE SEVEN GABLES
SETTLEMENT ASSOCIATION

MISSION, VISION, & STRATEGIC PLAN

Approved by the Board of Trustees — December 11, 2024

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ABOUT OUR ORGANIZATION

In 1908, activist Caroline O. Emmerton purchased the Turner-Ingersoll Mansion with the intention of establishing both a museum and a Settlement House. Emmerton, heir to a shipping and railroading fortune, came from a long tradition of social service. Upon learning about the difficult lives of recent immigrants living in Salem's Derby Street neighborhood, Emmerton determined to help. Using the mansion as her headquarters, she organized The House of the Seven Gables Settlement Association in 1910.

Built for Captain John Turner and his family in 1668 and expanded over the course of the 1600s and 1700s, the Turner-Ingersoll Mansion is an iconic example of early American architecture. It owes its fame, however, to Nathaniel Hawthorne's 1851 novel, *The House of the Seven Gables*. Hawthorne's cousin, Susanna Ingersoll, owned the home for much of the 19th century, and the author was inspired by her stories of old Salem and the house's history. By the 1890s, literary tourists regularly came to visit the property.

Emmerton, working with historic architect Joseph Everett Chandler, restored the exterior of the house to its 18th century appearance. They decorated and furnished the interior to reflect the space Hawthorne had seen, as well as to suggest fictional spaces from his novel. Emmerton's vision was unique in all the world—she opened the Turner-Ingersoll Mansion to the public as

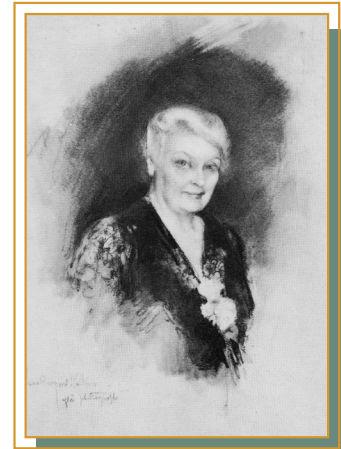
a historic house museum, with proceeds from admissions and souvenir sales supporting her organization's Settlement work.



In the early days, the Turner-Ingersoll Mansion also housed social workers and hosted classes for neighborhood residents, teaching subjects such as English, domestic science, arts and crafts, and building skills. The Settlement Association's work soon outgrew the mansion, and so other threatened historic properties were moved to the site. The Hooper-Hathaway House was brought to the campus in 1911, followed by the Retire Beckett House in 1924 and the Nathaniel Hawthorne Birthplace in 1958. A teahouse and barn, both now

incorporated into the 1994 Seamen's Visitor Center, were built as support structures. The Gables historic campus now occupies a full city block and was designated a National Historic Landmark in 2007.

Today, The Gables continues to carry out Caroline Emmerton's vision. We hosted over 98,000 visitors to the site in 2023. While these visitors still learn about Nathaniel Hawthorne and Salem's maritime history, the scope of the tour has expanded greatly. It now includes stories of individuals who were enslaved on the site, and stories about Indigenous presence in the area. We have also made efforts to interpret our history as a Settlement House, recreating a Settlement Worker's room adding it to the tour in 2023. Special programming touches on many subjects, but with an increasing focus on both the historical and present-day immigrant experience.





Historic preservation is also a priority for The Gables. In recent years, we have undertaken efforts to better care for and house our extensive artifact and archival collections—a challenge made more difficult because much of our storage space exists within historic buildings. With the effects of climate change rapidly escalating, our seaside location has also presented threats to both our buildings and our collections. In 2024, The Gables released a Climate Adaptation Plan calling for major changes to the campus over the next 50 years, in order to protect it against storm surge and sea level rise.

The Gables' Settlement Program has remained active throughout the decades, though it has taken many forms. A radical rethinking of the program in 2015 returned it to its roots, offering free English and Citizenship Preparation classes for residents of the North Shore. Over 500 students enrolled in classes in 2023; 65 students became US citizens. The Gables has most recently applied for Recognized Organization status with US Citizenship and Immigration Services, which will allow the organization to assist immigrants with naturalization paperwork and represent them in their dealings with the federal government.



OUR VISION & MISSION

VISION

We envision a nation where storytelling is a pathway to empathy, and history is a tool for transforming our present; where immigrants are supported and valued; and where positive change begins in our own neighborhood.

MISSION

As stewards of this iconic historic site, we aim to follow the tradition of Nathaniel Hawthorne and tell stories that reckon with the hard truths of our past, acknowledge our unique individual journeys, and remind us of our dependence on one another. As inheritors of the legacy of Caroline Emmerton and the Settlement House Movement, we aim to provide meaningful support for new immigrants, challenge misleading narratives that limit their opportunities, and empower them to write their own pages in our ongoing American story.

ABOUT THIS PLAN

In creating a new strategic plan for The House of the Seven Gables, leadership elected to forgo the traditional linear strategic planning process in favor of a model that lends itself toward ongoing engagement by all stakeholders, and is dynamic enough to accommodate new opportunities and challenges as they arise.

The **Integral Strategic Planning** model aims for more than just the creation of a document. Rather, it results in a **strategic mindset**, which permeates everything the organization thinks and does. A strategic mindset means that leadership and staff at all levels, from the Trustees to the front desk, are clear and united about goals and direction. With a strategic mindset, board meetings are productive and rewarding, providing an on-going feedback loop in which policies and activities are analyzed, challenged, and fine-tuned. Everyone is open to new ideas and eager to analyze results. A strategic mindset allows the organization to be entrepreneurial, flexible, and adaptive to whatever challenges arrive, setting the stage for success.

In our planning efforts over the past 18 months, we sought to:

Lay the groundwork for an institutional commitment to a strategic mindset that involves all levels of staff and stakeholders in an ongoing cycle of planning, execution, assessment, and refinement.

Align the organizational, programmatic, and operational strategies within a framework of staff, board, and stakeholder engagement.

Create a concise roadmap of the organization's strategic goals and objectives, which will inform annual workplans and individual performance plans in which tasks are tied directly to our strategic aims.

Adopt a strategy screen — a matrix of values and metrics to guide the organization as it meets opportunities and challenges.

The process began with a series of charettes and listening sessions with Gables staff, the Board of Trustees, the Advisory Council, and numerous community partners and stakeholders. Key themes emerging from these sessions included:



Informed by this feedback, a **Strategic Planning Workgroup**—composed of both Trustee leadership and staff from various levels of the organization—was assembled to draft, refine, and evaluate the strength of a set of strategic goals and objectives. Additionally, the workgroup developed a strategy screen, with criteria for assessing new ideas and initiatives, as well as procedures for evaluation.

The workgroup believes the seven goals included here present an integrated, ambitious, and achievable vision for The Gables in the years to come. While many of these goals can be accomplished by 2028-2030, some are more ambitious and complex. The intent is for staff and leadership to revisit this plan at least annually, using the strategy screen to identify new goals to replace those completed, and practicing strategic thinking in real-time.

STRATEGIC GOALS & TACTICS

ORGANIZATIONAL:

1. Build a community of philanthropy and support around The House of the Seven Gables, to better meet the challenges and opportunities that lie ahead.
 - a. In all communications, tell compelling stories that illustrate our meaningful and integrated mission, build on our reputation as a tourist destination, and emphasize our nonprofit nature and legacy of social service.
 - b. Grow membership to 1,000 member households & contributed revenue to 25% of total revenue.
 - c. Align The Gables' policies and procedures to established best practices for museum and social service nonprofits to provide donors with confidence in their investment.



2. Take proactive steps to mitigate and adapt to the existential threat posed by climate change. Act as a leader and model for the community in responding to climate challenges.
 - a. Implement recommended near-term actions from the Climate Adaptation Plan, addressing threats likely to impact us by 2030.
 - b. Develop a fundraising and investment strategy to generate the resources needed to implement mid- and long-term recommended actions.
 - c. In the spirit of the Settlement House Movement, address climate change as an urban crisis that demands community education and action.

3. With an attitude of openness and humility, embed the principles of Diversity, Equity, Inclusion, Accessibility, and Justice in our policies, actions, and culture.
 - a. Educate the leadership and staff about DEI principles and how to incorporate them into our work and mission.
 - b. Create an Inclusiveness Plan to outline and prioritize upcoming DEI work. Task the Community Engagement Committee with identifying obstacles to advancing the plan past initial steps.
 - c. Identify materials and programming that could be strengthened by a multilingual approach. Develop new programming with an aim to increase language access. Invest in staff or consultants to take advantage of these opportunities, and compensate multilingual staff accordingly for their contributions.

PROGRAMMATIC:



4. Tell the stories of Indigenous presence & interaction, Salem & the early United States, Nathaniel Hawthorne, Caroline Emmerton, and the Settlement Movement in ways that speak to modern audiences and include perspectives that reflect our visitors' lived experiences.

a. Expand our knowledge of Black life at The Gables and in the surrounding Derby Street neighborhood over the past 350+ years, as well as The Gables' connections to Black & Indigenous enslavement in New England and the Caribbean.

b. Reimagine the Nathaniel Hawthorne Birthplace as a museum dedicated to the author's work, personal experiences in Salem, and relevance to modern audiences.

c. Promote scholarship of, and public interest in, the American Settlement House Movement by collaborating with other organizations on programs, conferences, symposiums, internships, and grants.

d. Expand our interpretation of marginalized voices in The Gables' history, including women, Indigenous people, indentured and enslaved people, and LGBTQ+ people. Identify and address missing pieces in the topics and themes we discuss.

e. Tell more contemporary stories about immigration in Salem and the United States.

5. Expand the Settlement Program in ways that directly address the needs of local immigrants. Use our platform to amplify the voices of the communities we work with, highlighting the issues that matter to them and raising awareness among the broader public.

a. Obtain Recognized Organization Status from US Citizenship and Immigration Services, so that we can legally offer advice and assistance, and act as representatives for, individuals going through the naturalization and citizenship process.

b. Document our current model of citizenship preparation education and develop formal training for Settlement Program teachers.

c. Lead coalitions and partnerships that aim to address social issues in our community, honoring the holistic problem-solving approach of the Settlement Movement.

d. Understanding that demand for services will likely outpace capacity, develop a stronger sense of the resources required for each component of the program, in order to prioritize need and focus fundraising on key areas.



OPERATIONAL:

6. Grow and maintain a volunteer leadership and staff that reflects the backgrounds and experiences of our audiences—including emerging and targeted audiences. Invest in and support the personal and professional growth of our staff.

- a. Commit to bringing all full-time staff up to the calculated hourly living wage for Essex County by 2030. Increase part-time wages proportionally.
- b. Develop partnerships with local youth and workforce organizations to provide internships, skills training, and job opportunities in our areas of expertise. Place special emphasis on engaging immigrants and the children of immigrants in these programs.
- c. Provide onsite professional development and training opportunities for both full and part-time employees to aid in succession planning.

7. Enhance our stewardship and preservation of the cultural resources in our care, while increasing accessibility for visitors and researchers. Reduce our reliance on operating funds to support preservation projects by creating an infrastructure reserve fund.

- a. Provide a comfortable, meaningful, and aesthetic space for all visitors, including tourists, scholars, neighbors, and event customers. Serve as a gathering place for community conversation and a vibrant green space in the heart of Salem.
- b. Develop a Campus Plan that reflects new concerns and initiatives, chief among them climate change adaptations and collections storage solutions.
- c. Develop a long-term cyclical maintenance calendar, including systems replacements and planned improvements for the campus, with an estimated budget for these costs.



STRATEGY SCREEN

This strategy screen is to be used when considering projects or initiatives **that will significantly impact the direction or work of The Gables** at an organizational level, requiring collaboration across departments or between staff and leadership.

Such projects may align with current strategic goals or inspire the creation of new goals. The purpose of this process is to responsibly foster innovation and support The Gables in taking advantage of new opportunities.

Proposed projects will be assessed by the **Strategic Planning Workgroup**—a group of key Trustees and staff members. The workgroup will assess the proposal using the below criteria and provide a summary of their discussion and recommendations to the Board of Trustees. Trustees will use these recommendations to inform policy decisions and decisions about the strategic allocation of resources. This process may also be used to evaluate ongoing programming and initiatives to determine if they still fit within The Gables’ strategic goals.

PRIMARY CRITERIA:

The project should meet at least one of these criteria, and ideally will meet both:

	MEETS	DOESN'T MEET
Advances the mission, vision, values, & culture of The Gables.		
Grows the social capital of The Gables & offers opportunities for new collaborations or partnerships.*		

**Social capital is the benefits gained (information, resources, capacity, visibility, trust, etc.) through our network in Salem and beyond. It can be measured through quantitative means (student enrollments, fundraising, memberships), but also through the qualitative assessments of community members and partners. Successful proposals should explain how the project grows social capital and suggest criteria for measuring growth.*

SECONDARY CRITERIA:

Proposals will be ranked from 1 to 5 in each of the below criteria. It is understood that not every project will meet all criteria, and **the cumulative score of each proposal will be considered above its ranking in any single category**. The Strategic Planning Workgroup will submit an overall group score to the Board as part of their recommendations, but may also score projects as individuals during the screening process. Scores are only a guide to understanding the workgroup’s recommendations, and **there is no definitive “passing” or “failing” score**. That said, viable proposals will generally have a cumulative score of 15-20 or better.

	DOESN'T MEET 1	2	3	4	STRONGLY MEETS 5
Fits with the current capacity, resources, and culture of The Gables and minimally impacts operations.					
Creates new capacity and resources through revenues, grants, or partnerships.					
Creates a public benefit to the residents and communities of the North Shore. Fills a unique community need or responds to a pressing issue or seizes new opportunities to grow social capital.					
Minimally impacts Gables infrastructure and historic buildings, objects, and archives or actively preserves or protects these resources. Contributes to or does not negatively impact climate change mitigation and adaptation measures.					
Supports key audiences and stakeholders or builds new audiences. Does not replicate or directly compete with current offerings from partner nonprofits or businesses.					
Is sustainable in the long-term and advances the development of The Gables as an organization. Assumes an acceptable level of risk while promoting creative growth or generates a lasting impact.					

SUMMARY & RECOMMENDATIONS:

After scoring and discussing each proposal, the workgroup will return a summary of their discussions and a recommendation to the Board. This report should include:

- A group score in each criteria category and overall cumulative score.
- Explanations for scoring, a brief recap of the discussion, and a note of any dissenting opinions within the group.
- A reference to any current strategic goals the proposal meets, or a recommendation to amend or add strategic goals to accommodate the proposal.
- A summary of the effect this proposal will have on Gables resources, including finances, staffing, and preservation impacts.
- A recommendation to move ahead with the proposal, to reject it, or to submit the proposal for review again with additional information.

As members of the workgroup may initiate proposals as part of their regular work with The Gables, they may choose to abstain from the review process or be asked to abstain by a majority vote of the workgroup members. In these cases, the workgroup may appoint an additional reviewer from the staff or Trustees or may elect to review the proposal with the remaining members of the group. This should be noted in the final recommendation.

ACKNOWLEDGEMENTS

Strategic Planning Consultant:

Dan Yaeger, Museum Leadership Partners

Strategic Planning Workgroup:

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Rhiannon Callahan	Cheryl Knight	Erin Pucko	Paul Wright

Community Partners & Stakeholders:

City of Salem	Massachusetts Tribe at	Salem Partnership
Creative Collective	Ponkapoag	Salem Maritime National
Destination Salem	North Shore Community	Historic Site
Dobro New England	Development Coalition	Salem Sound Coastwatch
Essex Heritage	Peabody Essex Museum	Salem Witch Museum
Historic Salem	Real Pirates Salem	Salem Main Streets
History Alive	Saint Peter's - San Pedro	Salem State University
Intramersive Media	Episcopal Church	
Latino Leadership Council	Salem Chamber of Commerce	