

SANDY SPRING MUSEUM

STRATEGIC VISION 2013-2015

Prepared by
Allison Weiss
Executive Director

Approved by the
Board of Trustees
Summer 2013

Colors and Objects

BOARD OF TRUSTEES



valspar



quaker wedding dark



mulberry fringe



highlight



flesh



milk



pekoe pekoe



premier



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Allison Weiss (Executive Director)
Diane Bush (Director of Operations)
Katie MacGregor (Marketing & Administrative Coordinator)
Joanna Anderson (Educational Programs Coordinator)

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Consultant: Max A. van Balgooy of Engaging Places, LLC

Thanks to the many people who participated in interviews, surveys and focus groups.

Design by Max A. van Balgooy

Art work courtesy of Courtney Miller Bellairs, copyright 2013

*Imagine that the museum buildings and grounds
are filled with people...*

*artists who are creating works
inspired by the museum's collection;*

*storytellers who are recreating scenes
from Sandy Spring's past;*

*people who are visiting
a farmers or crafts market;*

*people who are enjoying music in
the Dr. Bird room or at an outdoor concert;*

*and families who are recording their own stories
at the Sandy Spring Museum Story Corps booth.*

*Imagine that the Sandy Spring Museum
is used by the entire community...
that the museum preserves the past
and documents the present
through outreach and engagement,
that the museum is a gathering place
where people can develop meaningful connections
by exploring community history through
the visual, literary and performing arts.*

Imagine a new kind of history museum.



emerald



stamen



pink trim



linen



clover



ice cream



sage



planters



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The appendices are available at www.sandyspringmuseum.org.



A NEW WAY FORWARD

The museum's new strategic vision entails opening its historic collection to interpretation by cultural artists – visual, literary and performing – who will use the collection in the creation of new works of art; and addressing the rapidly diversifying community by broadening its concept of history to include the stories of all of the people who live in the Sandy Spring neighborhood, those whose ancestry dates back generations and those who have moved to the area more recently.

KEY STRENGTHS AND OPPORTUNITIES

The museum has identified its historic collection and its facility as its core assets. All plans revolve around using these assets to their fullest potential in order to create a recognizable brand and to maximize revenue potential. Developing strategic partners is also key to achieving financial sustainability. Based on an analysis of current supporters, the museum has great untapped potential for fundraising from individuals.

KEY CHALLENGES

All new plans have been developed in consideration of maximizing sources of revenue. However no plan can identify enough earned income to balance the budget while fulfilling the mission. The museum will always be dependent upon soliciting sufficient contributions to cover at least 50% of its operating expenses.

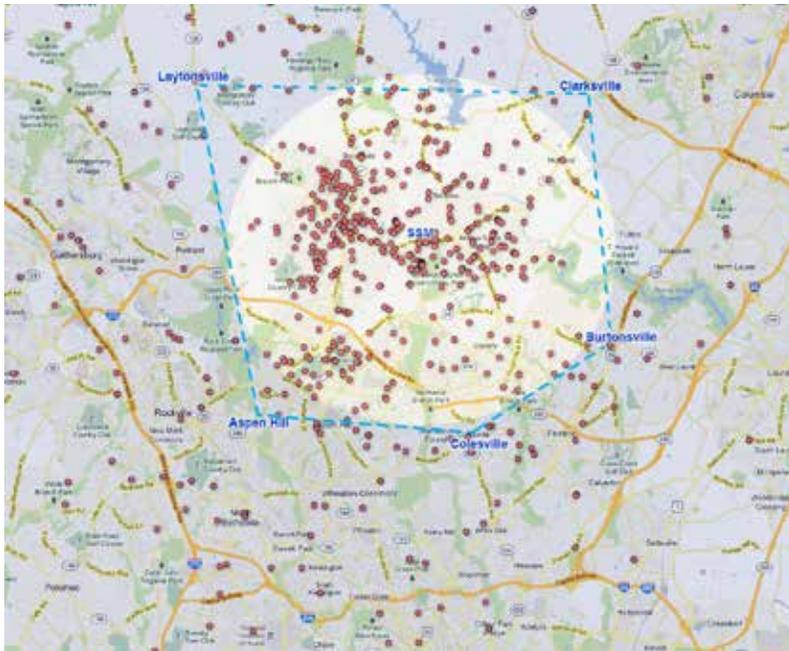
BACKGROUND

Founded in 1981, the Sandy Spring Museum was operated as a traditional local history museum for three decades. Run almost entirely by volunteers, the museum increased its size dramatically over the years, from its humble beginnings in the basement of the Sandy Spring Bank, to the historic home Tall Timbers, and then to its permanent home on Bentley Road in 1997 where it sits on over 7 acres of land and occupies a 9000 square foot building.

The museum was financially sustainable up until 2008, when a Perfect Storm hit: the museum increased its expenses when it hired its first full-time executive director; the museum realized the full effects of the costs of maintaining a large addition to the campus (which included a climate-controlled research library and collections storage area); and the museum suffered a decline in revenue when we lost the support of several large donors.

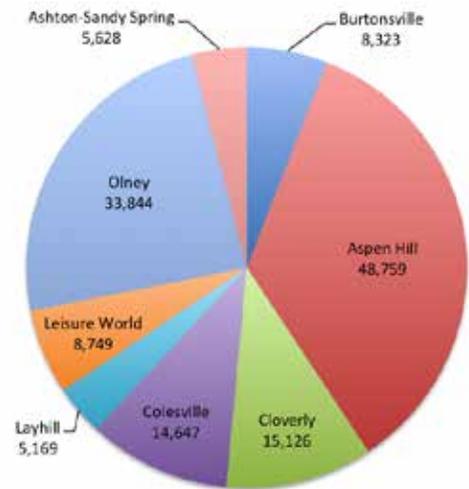
In May 2012, after suffering losses of about \$100,000 for each the previous three years, the museum hired a new executive director who was given the charge of overhauling the museum to make it relevant to the community and financially sustainable.

The board and staff embarked on a 6-month strategic visioning process beginning in November 2012 in order to create a new vision for the museum that would be heavily influenced by community needs, changing demographics, and a willingness to abandon the traditional history museum model, while not changing the original mission of preserving local history.



This map shows the location of the current local members of the Sandy Spring Museum as well as the primary service area--a 7-mile radius of the Museum.

The chart below shows the population of these communities and their proportion in the primary service area.





MASTER PLANNING PROCESS

PLANNING PROCESS

In November 2012, the Sandy Spring Museum Board of Trustees and staff embarked upon the creation of a new strategic vision. With significant input from museum staff and board, a steering committee, local government, cultural and educational leaders, members of the museum, and members of the general public, this plan was developed with the following goals:

- To develop a new strategic vision to clearly define the purpose of the museum;
- To base the strategic vision on the intersection of community needs and Sandy Spring Museum capabilities;
- To develop short term and long term goals to guide activities for the next 1-3 years.

The planning process took place between November 1, 2012 and May 1, 2013 and involved the services of Max A. van Balgooy of Engaging Places, LLC who served as a consultant; and a cohort from the Leadership Montgomery Class of 2013 whose members functioned as outside resources to aid and inform the process.

The process involved monthly Steering Committee meetings, weekly meetings with Leadership Montgomery cohorts and Mr. van Balgooy, individual meetings with community leaders, two focus groups with members of the general public, interviews with leaders of other cultural arts organizations, and leaders in the county government. All of the reports are included in the appendices of this document, which can be found on the museum's website.

The planning effort was comprised of 6 stages:

1. An assessment of current conditions
2. Demographic analysis of members and local community
3. Public input
4. Board retreat
5. Public presentation with opportunity for revisions
6. Final approval made by board

ASSESSMENT OF CURRENT CONDITIONS

We reviewed documents and data that related to planning and assessment including a 2012 SWOT analysis and a 2008 report by museum consultant Linda Sullivan. The museum is not operating in a vacuum and although some of its problems are unique, others represent trends in the field, the realities of the country's current economic status, and the changing face of today's consumer. Below are the primary challenges facing the museum:

- *Museum membership*, which has remained constant for many decades, does not represent the community at large. The membership appears to be monolithic – elderly, Caucasian, and Christian, whereas the surrounding community is extremely diverse (see appendix for specific demographic data). If people do not “see” themselves in the museum, they are not likely to support it. Museum membership reflects a demographic that is located within 1.5 miles of the museum. For the museum to be financially viable, it must be able to attract a broader audience or its members need to increase their level of support significantly.
- The *permanent exhibits* have remained relatively unchanged since the building was constructed. The topics appeal to a limited audience and are not relevant to the local community as presented. Completely overhauling the exhibits would require an enormous capital investment (estimates of professional exhibit installation are \$100-\$300 per square foot) and while a new exhibit might boost attendance and income in the short-run, it would likely not have the long-term benefit necessary to justify the expense.
- Half of the museum's *annual attendance* of 7000 visitors comes on one day: the Strawberry Festival. Lecture series, concerts, Garden Club programs, and various other public events attract small crowds and very little income.
- *What is Sandy Spring?* Historically “Sandy Spring” is both a village and a collection of villages. The “Sandy Spring” neighborhood is the 6-mile radius that begins at the Quaker Meeting House. Most people are unaware of this historic association. Therefore, while the museum considers itself to represent the history of all of the towns in the immediate vicinity, the general public assumes that the museum focuses only on the history of the village of Sandy Spring.
- *Changing community.* The demographics of the local community are changing rapidly and most residents have no historical or personal connection to Sandy Spring.
- *The museum campus* is its greatest asset and its greatest liability. Whether the building is open or closed, maintenance needs to take place, lawns need to be mowed, and HVACs maintaining climate control are in constant operation. The facility is extremely underutilized. Open to the public 33 hours per week, the museum is closed Mondays and Tuesdays, and does not keep any evening hours. Because walk-in attendance is so small, the museum is often empty, aside from staff and volunteers, on any given day.



*Finney Frock's
blacksmith shop.*

DEMOGRAPHIC ANALYSIS OF MEMBERS AND THE LOCAL COMMUNITY

Through census records, we conducted a demographic analysis of the surrounding 7-mile radius to determine the age, race, and income level of residents (a full report is included in the appendices). Using Nielsen's PRIZM lifestyle segmentation, we conducted a geodemographic analysis of current members and the local community in order to understand the socio-demographic identity of our members and identify areas of potential growth (these reports are included in the appendices).

All organizations have limited resources and often have to choose among several good ideas, programs, and activities. Although everyone is welcome to visit the Sandy Spring Museum and participate in its programs, the Museum must prioritize who it can best serve in a sustainable and effective manner. This report recommends enhancing the Museum's value to existing audiences and growing its support by attracting new audiences. Growth will most likely occur by creating programs that appeal to residents who are new to the area, younger, or ethnically diverse to align with the current and anticipated demographics of the region.

Based on the above studies, there appear to be four target audiences:

a. **Upper Crust: wealthy older without children**

- Ten percent (8,073 households) of the local community and 14 percent of the Museum's supporters (102 households) are in this segment.

b. **Second City Elite: upscale older without children**

- Nine percent (7,278 households) of the local community and 9 percent of the Museum's supporters (62 households) are in this segment.

c. **Upward Bound: upscale middle age with children**

- Nine percent (7,728 households) of the local community and 29 percent of the Museum's supporters (208 households) are in this segment.

d. **Country Squires: upscale middle age with children**

- Seven percent (6,114 households) of the local community and 21 percent of the Museum's supporters (150 households) are in this segment.

Taken together, these audiences represent 35 percent (30,193 households) of the local community and 73 percent of the Museum's supporters (522 households). By focusing programming and activities around these four target audiences either individually or in combination, the Sandy Spring Museum will be better able to satisfy the interests of existing supporters, engage the local community, and find opportunities for building capacity and financial sustainability.

Montgomery County is now a "majority-minority" county, with non-Hispanic whites making up only 49 percent of the population. Hispanics and Blacks now make up about 17 percent of the population each, followed by Asians at 14 percent and "other" at 3 percent. Thirty-eight percent of county residents speak a language other than English at home.

ADDITIONAL RESEARCH

We analyzed the museum's proximity to other cultural arts organizations in order to understand its competitive market and to look for potential partners. (See the appendices for a map that identifies other cultural arts organizations.)

Throughout the course of the planning, dozens of individuals were interviewed to explore perceptions about the museum's identity, community expectations, and analyzed the strengths, weaknesses and opportunities of exhibits, programs, special events, collections, outreach, retail and facility rentals.

A NEW VISION FOR THE SANDY SPRING MUSEUM

The new vision was developed with the following things in mind:

- *Community feedback.* The public has long complained that the exhibits do not change and that the collection is inaccessible.
- *Making the best use of our resources.* The two resources that offer us a distinct advantage are our historic collection and our facility.
- *Trends in the field of history museums.* Attendance at history museums is hitting an all-time low.
- *Developing ways to bring in more earned income.* How do we make use of our resources to develop new revenue streams?
- *Trends in consumer expectations.* Today's visitors want ways to actively participate and want to be able to "drop-in" rather than be locked into a scheduled activity.
- *Maintaining current supporters while building a new audience.* We do not want to alienate our long-time supporters by abandoning our mission of preserving local history but we need to change the way in which we fulfill our mission to appeal to a broader audience.



RECOMMENDATIONS – MAJOR GOALS AND OBJECTIVES

Three broad areas of focus were identified:

1. Bring the museum campus to life.
2. Develop strategic partnerships.
3. Maximize facility usage.

BRING THE MUSEUM CAMPUS TO LIFE

In addition to its collection, the museum’s greatest asset is its facility – its 9000 square feet of buildings and 7+ acres of land. Throughout the planning process, several people commented on the museum’s potential to house artists and become a “mini Glen Echo” (referring to the Glen Echo-based National Park site that is home to a plethora of visual and performing arts companies, cooperatives, and individuals).

We have already begun to take steps in this direction – installing a permanent blacksmith in the blacksmith shop, who conducts demonstrations for school groups and on days of special events, as well as being open to the public several days a week; renting a studio to a quilter; and more recently renting studios to a painter, a silversmith, a potters cooperative and an enamelist. There still remains great untapped potential for this model – installing artists in the exhibit hall, in the large barn above the blacksmith shop, and having art installations on the museum grounds.

To ensure that our brand is consistent, we recommend choosing artists who either represent current, local folk art and traditions, or artists who will be using the museum’s collection to inspire their art.

PROGRAMMING

The new vision is to make more extensive use of our historic collection of photographs, journals, and artifacts by opening the collection to use by a variety of cultural artists - visual artists, writers, story tellers – and to the general public - for the creation of new works of art; and to create unique, mission-based experiences for the four target audiences.

Focus on making the museum a convivial “third place” where people want to hang out and interact. . . . This could include using open space inside or adjacent to your facility for concerts, festivals or other gatherings. —Trends Watch 2013, American Alliance of Museums

Listed below are program initiatives that have recently been implemented, enhancements of existing programs, and program ideas that are in the formative stage.

NEWLY IMPLEMENTED PROGRAMS:

- Visual arts:** In March 2013, we opened an exhibit by artist Rebecca Vaughan-Geib who used images from our collection of early 20th century yearbooks in prints made through stone lithography. The prints were on display alongside the yearbooks, which have never been on exhibit. In May an exhibit by Courtney Miller Bellairs opened. Ms. Bellairs photographed dozens of objects in the collection and then used the photos in mixed media collages. Summer exhibits include a mixed media exhibit on the subject of food by the Olney Art Association, which had an online companion exhibit of recipes from the collection paired with works of art (<http://fromthehome.weebly.com>).
- Art Studios:** In order to generate reliable income, we have created studio space throughout the building and in the exhibit gallery for artists who want to work with the museum collection. For example, we have a resident enamelist who uses historic images from the collection in the creation of wall hangings and sculptural pieces. A variety of artists can be accommodated inside the exhibit hall, including an herbalist, or soap and tonic maker in the “kitchen” exhibit at the far end of the gallery. Instead of encountering a quiet exhibit hall, visitors will meet artists who are actively at work. The artists will be encouraged to create small exhibits in their studios with objects from the museum collection, thereby creating another way to get objects out of storage and on display. Studios will be phased in so as to cause as little disruption as possible to public programming and exhibits.
- Re-Inventing the Wheel:** The success of the Strawberry Festival illustrates that the museum is able to host large events and attract very large crowds. In June, we co-sponsored Re-Inventing the Wheel, a DIY family fair based on the Makers Faire concept with KID Museum, which attracted 650 participants. This can become an annual event.
- Very Berry Evening:** This event was offered for the first time in 2013, capitalizing on the long-standing success of the Strawberry Festival. A sell-out, it illustrates the potential for future, higher-end evening events.
- Creative writing:** We will make our collection of journals and photos available to fiction and nonfiction writers. Through a partnership with the Bethesda Writing Center, we will host our first writing workshop in the fall 2013.



“Rainbow” by Courtney Miller Bellairs, 2013.

ENHANCED EXISTING PROGRAMS:

- Legacy Newsletter:** For many years, the newsletter was researched and written by a professional writer/researcher (volunteer) and was cherished for its local history stories. That model has fallen by the wayside because of the time and skill needed to compose these articles. In order to appeal to our traditional supporters, we will make the newsletter more heavily focused on local history. Because we

do not anticipate having the staff necessary to do this, we will need to rely on a corps of volunteers, a “Research and Writing Club,” led by a volunteer editor.

- **Strawberry Festival:** Compare the Strawberry Festival with the Hospital’s annual summer picnic, which nets about twice as much in revenue. Consider making changes to the current model of the festival in order to make it a larger fundraiser.
- **Summer Camp:** Enrollment in the 2013 summer camp is already three times greater than 2012. This program can be expanded upon significantly through better branding and potential collaboration with the Sandy Spring Friends School. A brief business plan would show whether it is more financially beneficial to operate the camp in-house or to contract the camp to a vendor who will run it at the museum, under our name.



Strawberry Festival.

- **School Field Trips:** Field trip attendance is very low and groups tend to be small, making the current field trip model very staff-intensive and costly. Alter structure so as to have a minimum number of students in attendance. Partner with County Underground Railroad Experience in order to accommodate much larger groups. Consider hosting school programs on specific days with hands-on activity stations instead of the standard field trip, where groups of 50 school children rotate through various stations in 90 minute blocks of time.

PROGRAMS UNDER CONSIDERATION:

- **Extreme Exhibit Makeover:** To address the issue of our inability to change exhibits, we will host “Extreme Exhibit Makeovers.” Through this program we will identify artists, historians, exhibit designers, curators and members of the general public to form teams and create new exhibits in the main gallery, using the museum’s collection. This program has the potential to both update the exhibits and to attract significant media attention.
- **Collection Inspiration Days:** During these day-long workshops, we will make available reproductions of photos and documents from the collection to visual artists who will spend the day creating art that will be exhibited at the museum.
- **Sandy Spring “Story Corps”:** A section of the exhibit hall will be transformed into a Sandy Spring “Story Corps” booth where visitors can record stories about why they moved to Sandy Spring. In this way, the museum can expand its collection to include the history of everyone in the community. Public programs will invite people to come to the museum to share stories about artifacts that have personal significance, like a household object that was passed down for generations, or a personal belonging that was brought from a different country and now holds increased significance in a new country. We will offer ways for people to exhibit these objects at the museum.
- **Local Traditions:** Recognizing that the community has changed significantly since the museum’s founding thirty years ago, we will engage new residents

through community-curated exhibits that juxtapose the folklore traditions of newer residents with historic local traditions.

- **Conversational English/Acculturation Classes/TOEFL classes:** Responding to the large population of non-native English speakers, we are exploring offering various types of English and acculturation classes perhaps in partnership with the Sandy Spring Friends School. The Friends School hosts a large number of foreign exchange students who represent one target audience. This program could possibly be run as a for-profit business by a contractor.
- **Fantasy camps:** An in-depth study of a specialized topic with access to extraordinary resources can take many forms. Preliminary conversations are underway with the Sandy Spring Friends School to develop an intensive, week-long immersion program of a “museum experience,” be it focused on “traditional” skills like open hearth cooking, weaving, felting, blacksmithing, and so on. The week-long program would be offered to independent schools and home schooled children, while the one-day program would be offered to public schools. (See the appendices for examples of some model museum programming for children.) In depth “camp” programs can also be offered to adult audiences.
- **Sandy Spring Reunions:** An analysis of our membership shows that even when people move from the area, many retain their museum membership, creating the potential for a “museum alumni.” One way to foster this sense of attachment is through Sandy Spring reunions held every few years, or to create other ways for members to keep up to date with one another.
- **Food or wine/beer focused events:** Host more events or workshops focused on local or artisanal foods, such as the Museum’s Very Berry Evening. This type of event is growing in popularity with many museums and historic sites, seeing opportunities in the local food and slow food movements. For examples of successful museum programs to emulate, see appendix. Focus on what is unique to the region.
- **Special experiences around local history topics or places:** Create activities such as discussions with experts, organized visits to private homes and farms, and neighborhood walking tours with local historians. This concept is similar to the Historic Homes Tour but would be limited in participants, possibly creating an exclusive benefit for higher level members. (For potential models, see the appendices.)
- **Luxury study tours:** Offer tours to places out of state or overseas that have a significant connection to the region, for example, places associated with Quakers in England and Europe. (See the appendices for companies that offer luxury study tours.)



Class of 1959, Sandy Spring Elementary School.

STRATEGIC PARTNERSHIPS

Partnering with other organizations – for profit and non-profit – is the best way to stretch limited human and financial resources.

The advantages of strategic partnerships are sharing the risk; sharing resources such as for marketing and programming; and growing our audience.

Examples of some partnerships that are being pursued are (1) the Bethesda Writing Center to offer fiction and nonfiction historical writing courses; and (2) the Adventure Park at Sandy Spring to offer a joint program in which students will enjoy hands-on activities at the museum for half the morning, and then finish out the day at the Adventure Park.

Other partnerships include the Olney Farmers and Artists Market. Making use of our expansive grounds and large building, we can host other organization's ventures and benefit from income and the exposure, and make good use of the property when it is otherwise underutilized. The 2013 winter Farmers Market brought in several hundred visitors each Sunday, a day when the museum typically has fewer than 5 visitors.



Olney Farmers and Artists Market.

We recently partnered with the KID Museum, a very new children's museum that does not have a permanent home, to offer a Makers Faire in June 2013. This is the type of organization – an organization that does not have a facility – that is ideal for partnering with. For example, Class Acts Arts, an organization that offers in-school assemblies, may be a potential partner if they choose to host their own programs and need a facility for performances.

UNIDENTIFIED PARTNER

The museum's large, under-utilized facility and grounds offer the potential for the identification of a major partner who wants to utilize the building/grounds in a long-term partnership. For example, the Puppet Co.'s Whimsy Woods proposal (explained on next page) would have fit that criteria, but another potential partner has yet to be identified. It is important to continue outreach into the community and to let people know that we are looking for partners and proposals. Another tactic is to issue a Request for Proposals (RFP), outlining the scope of acceptable proposals but otherwise leaving ourselves open to possibilities.

MAXIMIZE FACILITY USAGE

The museum's greatest asset is its seven acres of land and its physical buildings – the museum itself, the large barn and the small barn located alongside the courtyard; and the Snowden House located next door to the museum (which is owned by the museum). In order to achieve financial sustainability, we need to maximize our assets. Currently our campus is vacant a larger percentage of the time than it is occupied.

The following have been identified as areas of focus:

1. Short-term rentals with organizations that have existing and similar audiences (e.g., home school families, Writer's Center, Olney Farmers Market).
2. Long-term rentals with non-profit or commercial tenants (e.g., school, artist, lawyer, house rental, etc).
3. Enhanced mission-related programming and events (e.g., Strawberry Festival, newsletter, exhibits). These would be a continuation and expansion of some existing activities, with a preference to those that use the collections, provide value or grow membership, and fulfill the mission.

COMMERCIAL USAGE OF MUSEUM FACILITY

Some ideas that are being explored are as follows:

We were approached by the Puppet Co. from Glen Echo Park whose founder was interested in starting Whimsy Woods, a story book park, on our grounds. This project may be impossible to pursue because of the existence of a Type I conservation easement on the **3 acres of forest land** in which the story book park would be built. Discussions with the Department of Parks and Planning suggest that if we want to utilize the land in any way, it will be necessary to remove the conservation easement, which could cost an estimated \$200,000.

Currently we can do nothing with the land under the easement. The board should decide whether to abandon the idea of using the land under the easement, or identify a use that will make it worth the financial investment of removing the easement. The right commercial usage could provide much needed financial stability to the museum.

For the past twelve years, the **Snowden House** was occupied by the person who performed contractual museum maintenance work. The board recently concluded it would make more sense financially to find another use for the building, as the rent was below market rate.

Possible alternate uses for the Snowden House include renting the property to a non-profit whose mission dovetails with ours, a for-profit business that can bring potential audience to the museum, or use it for another commercial purpose that is allowed within the zoning but does not align with the museum's mission, but does not compete or detract from it.

Another use for the Snowden House is an artists' residence. There are two different models for this: (1) have the residencies underwritten and offer free housing; or (2) rent the house to artists. In either case, the artists would be selected through an application process and would be required to make use of the museum's collection in the creation of new works of art.

To proceed, the board needs to choose one of two distinct options: (1) identify a new tenant in the form of a business/nonprofit or (2) establish an artists' residence. Whatever option is selected, the house will require major renovations and repairs.

The **small barn** that houses a collection of agricultural tools will also be rented. We are currently in lease negotiations with a potters' cooperative. The museum would benefit from the income and the presence of the potters who would fill the same role

as other artists – provide the public with the opportunity to interact with craftspeople and watch the creation of the work. It may also lead to other collaborations with the potters that will benefit the museum.

EVENT RENTAL

Because the museum facility is unoccupied a large percentage of time (the museum is open to the public about 35 hours/week), capitalizing on the potential for rentals needs to be invested in through marketing and outreach. Ideally the Dr. Bird room will be rented on a daily basis when the museum is not open (Mondays and Tuesdays) and every evening of the week.

Two potential on-going renters have been identified:

1. Home school groups that are looking for classroom space
2. Montgomery County Community College

Other potential renters include “meetup” groups, such as book clubs; prayer groups; or a fledgling church without a home.

Another idea that deserves exploration is for the facility to be used as a coffee house/ music venue one night of the week. This would only be possible if an outside group or individual wanted to run it; it is not recommended for the museum to branch out into non-mission related activities.





ice cream



ebert



fresh



milk



pure



tonic

HUMAN AND FINANCIAL RESOURCES

HUMAN RESOURCES

Curator: Currently we have an assistant curator who works about 10 hours/week on contract. This is not a permanent staff position. Make the curator a permanent position at 12 hours/week in order to provide artists access to the collection; continue to process the collection; digitize records; fix hundreds of records that have incomplete or incorrect information; and oversee volunteers who can be working more actively in collection.

Artist & Exhibit Coordinator: Since the new vision focuses heavily on artists, create this new position at 15 hours/week. This position is responsible for communicating the vision to artists and serving as the main point of contact with artists. Staff will also manage artists' leases and work with resident and non-resident artists in the creation of an annual exhibit schedule; develop exhibit ideas; install and promote exhibits; and review artists' proposals.

Education Outreach Coordinator: Current staffing levels do not allow for expansion of programming. Make this position full-time.

Development Coordinator: In order to reach the financial goals we are striving for, hire a part-time development coordinator to facilitate the work of the Board Membership & Development Committee.

VOLUNTEER INVOLVEMENT

Volunteer Coordinator: The involvement of volunteers is currently not very robust. The Garden Club provides an interesting model to replicate. Acting as both a social club and a group of volunteers, the club raises money to maintain the courtyard garden at the museum. This model of a "club" works very well because they are self-perpetuating – they train their members, they schedule their work, they set priorities. Replicate the model of the Garden Club throughout the museum - a Collections Club, an Archives Club, a Research and Writing Club, an Oral History Club, etc. The job of the volunteer coordinator is to identify leaders for the various clubs, help recruit members, and to provide the infrastructure necessary to maintain a large corps of volunteers.

Board members: Create a board whose demographic makeup matches that of the surrounding community. Have a succession plan for leadership. Recruit board members strategically, based on the needs of the museum.



mustard spice



mapleine



clover



polka dot



carrie



flesh

THREE-YEAR BUDGET

The 3-year budget projection shows the potential income of new revenue streams. The greatest potential is in rentals - rentals related to the museum mission, like art studios, and those not related, like weddings. We do not see educational programming as generating significant income. This report also recommends eliminating the admissions charge of \$5 per person and replacing it with a suggested donation. During the 2012-13 year, free admission on Wednesdays has led to Wednesdays being our largest day of attendance. Admission charges would still hold for any scheduled group visits that require a guide (adult groups and school field trips.)

Implementing the new vision will not require significant capital expenditures. Some building revisions may include the installation of accordion doors at the gift shop, and throughout the exhibit hall if artist studios require them; improved lighting and ventilation in the exhibit hall if it is used as artist studios; and new means to exhibit objects on a short-term basis. A Sandy Spring “Story Corps” booth will require purchasing a new computer and headphones, and some minimal furniture. Renovations down the road may include installing a sink in the large classroom so it can be used for arts and crafts workshops.

This projected budget also shows that more than 50% of the annual budget needs to be raised through donations from individuals and from business sponsors. This includes income from membership, and fundraising events, such as the Strawberry Festival and the annual gala. Creating and implementing a successful development plan is imperative to the success of the museum, as is creating a planned giving campaign to ensure future financial support from key members of the museum community. Support from individual donors is typically the largest source of income for a nonprofit, far surpassing corporate and foundation support and funding from grants.

A continued focus on fundraising is recommended, including membership, planned giving, and grant applications to the National Endowment for the Arts and the Institute of Museum and Library Services. Often these grants are program-related and strongly favor new programs. As such, applying for these large, national grants during the early years of implementing the new vision is key. The museum does not have relationships built with any of the large local or regional foundations; recruiting board members who have associations with these foundations is advised.

The future of American philanthropy, like the future of everything else in the country, will be shaped by increasing racial and ethnic diversity. According to the Minnesota Council on Foundations, “Who donates and what they give will be profoundly impacted, and public policy will become more representative of minority communities.” —Trends Watch 2013, American Alliance of Museums

While past boards were extremely successful in raising funds for capital projects, no emphasis has been placed on raising funds for operations. Considering the large number of individuals who gave significant financial gifts towards building the museum and the library, fundraising from individuals appears to be an untapped potential source of income.

Lastly focus on growing the endowment. For many years, the endowment has stagnated around \$500-\$600,000, which realizes an annual draw of \$30,000. A goal of building a \$2 million endowment over the next five years would result in an annual draw of \$100,000, significantly addressing expenses for daily operations. The Board of Trustees recently voted to revise the Financial Policy as it relates to managing the endowment, which will hopefully lead to better returns on our investments, but a significant effort should also be made to increase the corpus.

	INCOME	2013 EST.	2014	2015	2016
1	Membership	\$22,000	\$22,000.00	\$24,000.00	\$26,000.00
2	Admissions and Special Events	\$104,742	\$108,300.00	\$101,600.00	\$108,900.00
3	Total Donations	\$88,000	\$110,000.00	\$117,000.00	\$133,000.00
4	Total Grants	\$25,000	\$75,000.00	\$75,000.00	\$50,000.00
5	Art Sales	\$7,500	\$3,000.00	\$6,000.00	\$9,000.00
6	Gift Shop sales	\$12,950	\$12,000.00	\$0.00	\$0.00
7	Facility Rental Income	\$44,652	\$68,175.00	\$83,180.00	\$90,180.00
8	Programming	\$21,183	\$29,660.00	\$34,840.00	\$38,040.00
	Total Income	\$326,027	\$428,135.00	\$441,620.00	\$455,120.00
	EXPENSES				
9	Cost of Good Sold - gift shop	\$9,065	\$8,400.00	\$0.00	\$0.00
10	COGS Art sales	\$5,250	\$2,100.00	\$4,200.00	\$6,300.00
11	COGS Event Expenses	\$33,601	\$41,385.00	\$40,385.00	\$41,385.00
12	Administration	\$22,530	\$27,830.00	\$28,030.00	\$28,230.00
13	Debt interest	\$9,500	\$8,400.00	\$10,000.00	\$10,000.00
14	Payroll	\$191,286	\$251,222.00	\$258,249.00	\$265,997.00
15	Employee health insurance	\$0	\$0.00	\$0.00	\$0.00
16	Employee retirement	\$0	\$3,904.00	\$4,015.00	\$4,145.00
17	Professional Services	\$14,430	\$6,980.00	\$7,000.00	\$7,000.00
18	Facilities	\$46,720	\$59,220.00	\$57,220.00	\$57,320.00
19	Computer/Technology	\$7,860	\$7,360.00	\$7,460.00	\$7,460.00
20	Communications	\$15,950	\$15,550.00	\$15,900.00	\$16,000.00
21	Collections	\$0	\$500.00	\$500.00	\$500.00
22	Exhibit Expense	\$1,000	\$3,500.00	\$2,000.00	\$2,000.00
23	Education Department	\$500	\$1,000.00	\$500.00	\$500.00
	Total Expenses	\$357,692	\$437,351.00	\$435,459.00	\$446,837.00
	Net Income	-\$31,665	-\$9,216.00	\$6,161.00	\$8,283.00



earl



sage



tea bag



tea leaf



pekoe pekoe



salve

IMPLEMENTATION TIMELINE

Because the museum is in a financial crisis, we have already started to move forward on some of the ideas proposed in this report. For example, we have been working with visual artists who are creating new works of art from the museum collection, and we have rented several studios to artists.

PROGRAMMING YEAR 1

1. Hire fulltime Education Outreach Coordinator.
2. Hire Artist & Exhibit Coordinator.
3. Hire Development Coordinator.
4. Continue to promote availability of studio rentals through online advertising and outreach to groups that represent multiple artists.
5. Finalize year-long schedule of exhibits in gallery.
6. Create year-long schedule of signature special events, to include annual Makers Faire
7. Partner with Bethesda Writing Center for historical fiction/nonfiction writing workshops.
8. Change structure of field trip to eliminate small group visits. Offer off-site assemblies and in-house large hands-on activity days.
9. Strengthen volunteer program through better marketing and identifying leaders within the volunteer ranks.
10. Identify volunteer newsletter editor to improve local history content of newsletter.
11. Identify storytelling guilds with which to partner.
12. Host Extreme Exhibit Makeover.

PROGRAMMING YEAR 2

1. Host storytelling festival.
2. Host 1 Collection Inspiration Day.
3. Host annual members' exhibit in which all art must involve use of collection.
4. Increase newsletter to 6 times per year, featuring research from the collection and new accessions.

5. Plan for Sandy Spring reunion to be hosted following year.
6. Set up Sandy Spring Story Corps booth in exhibit hall. Host public story corps day.

FACILITY YEAR 1

1. Identify renter for small barn.
2. Clean out storage shed and basement to better use space.
3. Renovate Snowden House and identify renter.
4. Post RFP to try to identify major partnership.
5. Improve traffic flow through facility with signage and better training of front desk staff.



FACILITY YEAR 2

1. Move forward with investigation of removal of conservation easement.
2. Renovate large barn in order to accommodate artist studios.
3. Consider improvements to front of property to make entrance more prominent.
4. Move forward with investigation of removing conservation easement.
5. Identify commercial retailer to run a gift shop in place of the museum's gift shop.

MARKETING YEAR 1

1. Conduct awareness survey.
2. Launch branding campaign.
3. Redesign marketing pieces to create consistent look throughout all printed materials.
4. Update website to reflect new vision.

MARKETING YEAR 2

1. Embed blog on website.
2. Create marketing plan for increasing event rentals and regularly repeating rentals.

COLLECTIONS YEAR 1

1. Implement Collections Club and Archives Club in order to make progress on documentation and digitization of collection.
2. Identify new home for oversized artifacts that are stored in large and small barns.
3. Identify artifacts for deaccessioning.

COLLECTIONS YEAR 2

1. Make collection available online through PastPerfect.

2. Host online exhibits featuring changing artifacts.
3. Create ongoing opportunities for research-based internships.

METRICS, RISK, AND EXIT STRATEGY

The museum is at an important juncture in its history. For the past three years, it has fallen short of its budget by nearly 1/3 (\$100,000). Because the old model is not working, the museum needs to do something bold to change its course.

Most of the ideas proposed in this report involve little financial risk. In fact, the new programs that have already been implemented have resulted in increased income (primarily through studio rentals) with virtually no associated expenses. Many of the ideas were selected specifically because they would not involve the huge investment that, for example, a major overhaul of the permanent exhibits would entail.

Success of the new vision can be measured by the following metrics:

- 1) Increased earned income. Rentals, facility rentals, partnerships, and programming should increase earned significantly over the 2013 budget.
- 2) Increased donations by individuals. Donations by individuals has stagnated over the years. Donor fatigue may be the cause but it may also be the result of not having something new to show donors, or not being able to cite an increase in audience, volunteers, programs, and so on.
- 3) Increased number of donors. By recognizing the changing demographics of the community and offering targeted programming, we anticipate an increase in the number of individual supporters.
- 4) Increased attendance. New programming, studio rentals, and partnerships like with the Olney Farmers Market should lead to an increase in walk-in traffic.
- 5) Increased volunteerism. A renewed focus on creating opportunities for individuals to participate in museum operations will lead to an increase in volunteerism.
- 6) Expanded awareness. Anecdotal evidence suggests that many people are not aware of what the museum has to offer. A simple market survey could be conducted on an annual basis to determine whether awareness is increasing.

At any time during the implementation phase, the board may choose to abandon the new direction and return to running a traditional history museum – with static exhibits and lectures – with small effort. Current studios under lease can be converted back into offices.



APPENDICES

All reports referred to in this strategic vision can be found at www.sandyspringmuseum.org.

1. Report by Linda Sullivan, September 2008
2. Internal SWOT analysis, January 2012
3. Focus Group questions and responses, Winter 2012
4. Museum Membership Survey results, December 2012
5. US Census Data on 7 mile radius of Museum, 2010
6. Local Community Profile by Max A. van Balgooy, April 2013
7. Profiles of Members and Donors by Max A. van Balgooy, December 2012
8. Potential Programming for Target Audiences by Max A. van Balgooy, May 2013
9. Montgomery County School District Trends, 2012
10. Map of cultural arts-related organizations in the vicinity of the Museum

