Sandy Spring Museum

Strategic Plan (2023-2028)

Executive Summary and Discussion of Key Strategies

December 2022
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I. Methodology and Scope of Work

This strategic plan was completed by the Sandy Spring Museum (SSM) Strategic Planning Committee, comprised of senior SSM staff, board leadership, and pertinent community stakeholders.

This plan was facilitated by Brett Egan. Research and writing was conducted by the DeVos Institute consulting services team and discussed in meetings, interviews, and teleconferences with the Sandy Spring Museum Strategic Planning Committee during the period of March-December 2022.

The term of this plan is five years, beginning in January 2023.

This Executive Summary accompanies a PowerPoint presentation that describes the strategies in full; an implementation spreadsheet that outlines each objective, strategy, and tactic; and a five-year financial plan.

The Museum can use this strategic plan for the following purposes:

• As a management tool for staff and board, to organize action through prioritized objectives that mitigate challenges and leverage strengths;
• As a fundraising and marketing tool, to convey SSM’s direction to external stakeholders;
• To measure the success of its principal objectives;
• To reassess, over time, progress against those objectives and apply necessary course-corrections; and
• To plan the generation and allocation of human and financial resources.
II. Planning Framework

This planning process followed a six-stage framework:

1. A review of SSM’s mission;
2. A study of the environment in which SSM operates, resulting in the definition of factors required for SSM’s success;
3. An internal analysis of challenges, strengths, and opportunities at SSM, in relation to those success factors;
4. A set of objectives, achieved by strategies, that confront the opportunities and challenges outlined by that internal analysis;
5. An implementation plan outlining who will complete each strategy, and when; and
6. A financial plan that states the economic ramifications of those strategies.

Together, these parts constitute a strategic plan intended to address short-term, mid-term, and long-term opportunities and challenges facing Sandy Spring Museum.
III. Mission, Vision, Values, and Environmental and Internal Analyses

A. Mission, Vision, and Values

Through this process, Sandy Spring Museum revised its mission to read:

*Sandy Spring Museum connects diverse communities and advances social equity through shared and inspiring experiences of our region’s cultural heritage.*

The process also authored a new Vision:

*Sandy Spring Museum envisions an equitable Montgomery County that leverages the rich and diverse cultural heritages of its residents as a vehicle toward increased empathy, cross-cultural understanding, and coalition building.*

Additionally, the Planning Committee revised the Museum’s values:

*The Power of Shared Experience: We believe shared experience creates and sustains strong communities.*

*The Urgency of Equity, Inclusion, and Diverse Perspectives: We believe pro-active steps are required to build, and preserve, an equitable, inclusive, and diverse Museum and society. We offer a platform for diverse perspectives and cede authority to artists and communities regarding how to represent themselves.*

*The Wisdom of Collaboration: We believe we are our best as individuals and organizations when we work together for mutual benefit.*

*The Vision of Innovation and Culture: We marshal every available resource to support creative risk and experimentation. We believe that creative practice is an essential tool to envision and build a better tomorrow.*
Stewardship and Resourcefulness: We are entrepreneurial and responsible managers of the Museum’s financial and physical assets, including its historic collections. We continually seek to strengthen ourselves so that we may better serve our neighbors and the artists who call these halls home.

Staff and board of SSM dedicate themselves to ensure this mission and this vision are resourced – with superior expertise and sufficient financing – for the duration of this plan.

B. Environmental and Internal Analysis

In preparation for strategy development, an environmental analysis was conducted to determine what would be required for SSM to provide superior and sustainable services in each area of its mission. This environmental analysis considered the programming, marketing, and internal practices of peer organizations, as well as major trends facing folklife centers and Museums, the world of community-engaged programming, and the arts and culture sector overall. This analysis was conducted through online, print, and in-person research, interviews, and comparative financial analysis.

Together with that effort, an internal analysis was performed to determine SSM’s status in relation to the environment. The internal analysis consisted of interviews with key stakeholders both inside and external to SSM’s core operation, working sessions with staff and board, and extensive data and documentation review.

Summary

In summary, all successful cultural and educational organizations, including Sandy Spring Museum, require:

1. Dominant, unique Programming in their mission area. In a media-saturated environment characterized by extreme competition for contributed and earned
revenues, there is no room for second best. Sustainable non-profit organizations must
develop superior human and intellectual capital, and deliver that capital, consistently,
through superior services.

2. Aggressive Marketing, both programmatic and institutional, to attract people to
program offerings and engender a sense of loyalty to the institution overall. A strong
marketing effort must express, again and again, the institution’s superior service in its
mission area.

3. A growing, generous Family of board members, advisory committee members, donors,
and volunteers. Engaged by dominant program and aggressive marketing, this family
must be carefully cultivated, stewarded, and solicited over time to provide the
necessary base for the organization’s fundraising efforts.

4. Easy, enjoyable means for that family to contribute Revenues and other resources.
Sustainable organizations provide a variety of mechanisms (or fundraising products) to
engage family members as donors (of time and resource). Likewise, they develop
diverse earned revenue streams through both retail (fee-based) services, and other
commercial uses of their intellectual and creative capital (e.g. training, licensing, or
consulting services).

5. Re-investment of funds in more unique, dominant programming the next year.

These essential actions can be defined as a Cycle of activities that support the conditions
required for sustainability in any cultural organization.

1. Programming

SSM holds a cherished role in the lives of many in Sandy Spring and Montgomery County,
representing a trajectory from past to present and future that connects the contributions of
residents to a shared social fabric. SSM’s long-standing commitment to community
engagement, social equity, folklife, and creative expressions of the region are undisputed. The
Museum’s Strawberry Festival, community-focused public programs, and its work as the
Regional Folklife Center of Montgomery County exemplify SSM’s strong standing in the
community.
At the same time, Montgomery County is growing and changing, challenging the Museum to evolve.

In August 2022, the General Assembly of the International Council of Museums approved a new definition for Museums:

“A Museum is a not-for-profit, permanent institution in the service of society that researches, collects, conserves, interprets and exhibits tangible and intangible heritage. Open to the public, accessible and inclusive, Museums foster diversity and sustainability. They operate and communicate ethically, professionally and with the participation of communities, offering varied experiences for education, enjoyment, reflection and knowledge sharing."

This sentiment inspired SSM in its planning process, encouraging a deep look at how the Museum could become more relevant and aligned with the community’s needs.

Locally, some area peers offer overlapping services suggesting SSM continue to seek increased differentiation.

a. The Folklore Society of Greater Washington produces folklife programming but mostly concentrates on Americana, European, and Appalachian performing arts. They host the Washington Folk Festival, an annual event at Glen Echo, that focuses on global traditions rather than local or regional ones.

b. Montgomery County Historical Society presents significant crossover in historical mission, stating its purpose is “to collect, preserve, interpret, and share the histories of all of Montgomery County’s residents.” However, as different from SSM, their program does not meaningfully integrate cultural arts.

c. Olney Theatre Center (OTC) appears to be increasing its focus on community, partnering with diverse groups to design and produce community-engaged programming. Social justice and anti-racism are salient characteristics of the current
message. Additionally, to encourage new and repeat attendance from the local community, OTC is revamping its programs and adding new offerings to the mix.

However, to-date, no regional peer has gone as deep into the work of community-engagement and collaborative folklife as Sandy Spring Museum.

In support of artists, several peer organizations have developed strong programming, providing:

a. Visibility for Artist Work: The Glen Echo Park Partnership for Arts and Culture curates and manages three galleries: Popcorn Gallery, Stone Tower Gallery, and Park View Gallery. These spaces present work by both established and emerging artists, with new exhibitions presented every four to six weeks. Resident visual artists and organizations also have galleries where artwork is displayed and for sale.

b. Professional Development: VisArts runs nearly a dozen different artist residency and support programs, including The Arts and Social Justice Fellowship Program, the Emerging Teacher Mentorship Program, and the Sanctuary Studio Fellowship provides support for a promising contemporary visual artist who is emerging and/or a recently relocated refugee or asylee.

c. Residencies: A flagship program of Strathmore’s Institute for Artistic and Professional Development, the Artist in Residence (AIR) program was created in 2005 to support artists as they transition to professional careers. Strathmore’s AIR benefit from the support of mentor musicians, participation in professional development seminars, and extensive performance opportunities throughout the 10-month program.

No local organizations aside from Sandy Spring Museum specifically support folk and traditional artists.
Internal Analysis

a. Historically, the Museum’s key value proposition fell at the intersection of three entities: folklife; local history; and community. This intersection differentiates it from every regional peer.
b. SSM would have a difficult time competing with area peers in the arena of formal, global or world-class performance or visual art presentation.
c. An exclusive or primary focus on Sandy Spring – in name and practice – may unnecessarily limit the Museum’s appeal. What can be done to broaden the appeal of the institution to the much larger audiences to its southwest and southeast?
d. The Museum’s longstanding practice in community engagement is being pressured by new entrants who are developing similar services. How can the Museum communicate its long-standing commitment, while simultaneously outpacing its neighbors, both in agility and depth?
e. Annual themes or multi-year arcs of programming can help create cohesion among events that build dialogue, depth, and traction. These themes, when planned several years in advance, can form the basis of a long-term fundraising, marketing, community engagement, and board development plan.
f. The Museum’s collections will benefit from a targeted activation plan. National peers provide examples of means to create robust and exciting interactions between collections and living artists and interpreters.

2. Marketing

There are two types of marketing. All cultural organizations need both:

a. Institutional Marketing:

i) Marketing that makes the organization, more identifiable, that systematically raises awareness and reinforces organizational identity. This marketing results
in the institution becoming integral to Montgomery County and the lived experience of its residents.

ii) This type of marketing promotes the people, places, processes, and ethos of the institution, and is critical to both earned income and fundraising success.

b. Programmatic Marketing:

i) This type of traditional, transaction-producing marketing relies on the data-driven use of ads, social media, mailings, websites and online media.

ii) It is supplemented by aggressive affinity marketing, which builds partnerships with other local organizations around a shared activity or affinity to attract the following of that organization. Affinity marketing is less costly and more effective than advertising.

iii) Programmatic marketing mechanisms of competitive peers include:
   (a) Aggressive data capture and analysis to inform data-backed decision-making and a segmented approach to customer communication;
   (b) Consistent affinity-based outreach and engagement;
   (c) A compelling, well-groomed online interface;
   (d) An aggressive, multi-channel social media effort;
   (e) A CRM that effectively aggregates preferences; and
   (f) An augmented experience that consistently bests expectations.

Internal Analysis

a. Marketing strategy is downstream from programming identity and, without question, SSM will benefit from a clearly defined market position.

b. A long-term program-planning calendar is the single most important investment SSM can make in the marketing program. On small teams, long-term planning of major endeavors is especially important to enable proactive marketing.
c. The Museum will very likely need to spend more on marketing to drive more earned revenue. It has accomplished a great deal on a modest budget but can likely achieve more with an investment in this area.

d. Affinity marketing (relationship or trust marketing) is likely to be the Museum’s most realistic path to increased attendance. An investment in this human resource is likely necessary to meet this opportunity.

e. Audience growth and diversification are both important but are different goals. Meaningful growth will likely come first from attracting inclined audiences.

3. Board and Family

Sustainable organizations intentionally organize and motivate their stakeholders, including donors, trustees, and volunteers.

Internal Analysis

a. The Board plays an important role in securing the financial wherewithal of Sandy Spring Museum. While no formal give/get requirement is in place, the suggested annual contribution was exceeded, on average, in recent years. This results in the identification of between 3.5-6.5% of organizational expenses each year.

b. How can SSM define family in a unique and compelling manner, in a way that leads the region and the field toward a more comprehensive notion of what it takes to develop and sustain a community and cultural practice?

4. Revenues

Successful peers:

a. Diversify contributed revenue sources, using three primary mechanisms:
   i) Annual campaigns, including membership programs.
ii) Targeted campaigns (commissioning circles, scholarship funds, etc.).

iii) Special events

b. Focus on the prospecting, cultivation, solicitation, and stewardship of donors, and especially top prospects – individuals with the ability to make a decision, or contribution, that will meaningfully affect the future of the organization. These can be individual donors, program officers at foundations, corporate social responsibility officers, potential artistic and institutional partners, or members of the press.

c. Make it fun and easy to stay involved as a donor.

d. Connect their work and impact to broader societal themes/needs. Peer fundraising efforts are bolstered by messaging focused on a well-promoted change narrative that expresses the impact of the organization’s work.

Internal Analysis

a. The Museum has done well to balance its sources of contributed revenue, with most of its contributed revenues coming from individual and government grants.

b. SSM revenues from foundations have been very modest, representing an area of opportunity if programming aligns more closely with relevant foundation priorities.

c. Amongst regional peers, fundraising expenses as a percent of contributed revenue run the middle ground, but there is clearly opportunity to raise more money, as both gross revenues and delta are low. This is echoed on a national level.

d. Compared to the average Museum, SSM earns more and raises less, as a percent of budget. Major differentials are the lack of private foundation support, the lack of a meaningful endowment, and a larger share of budget from rentals and government grants. It paces well ahead in its percent of support from individuals.

e. If SSM is to undertake a significant capital campaign (e.g. to fully fund its master plan) it is likely that a preparatory period will be required wherein the Museum furthers its relationships with major donors, and builds a deeper bench of foundation and corporate supporters. This will almost certainly require the addition of new human resources. In the meantime, SSM can continue to pursue grants to address specific phases of the master plan’s vision, as it has done successfully in recent years.
Regarding Capital and Capacity

a. There are calls for broad and deep investment in staffing. It is likely that in order to develop additional public and private resources commensurate with its ambition, the Museum will need to make meaningful staffing capacity investments in the areas of individual giving/membership, programming, and marketing.

b. It is projected that the Museum will require in the order of $10M to undertake the improvements sought in the Master Plan. The first $200K has been committed to the first phase and the $1.5 million of the next phase (construction of the Folklife Hub) is anticipated to be funded through grants. $10M represents approximately 20 times the average unrestricted contributions over the past three fiscal years.

c. The Museum does not actively raise money for the endowment, which is currently valued at about $725,000.

IV. Strategic Direction, Objectives, and Key Strategies

Because of these analyses, a strategic direction – or top-line narrative about the future activities of the institution – was developed.

This strategic direction is detailed by long-term objectives, or goals, that evidence progress in respect to that direction.

Individual strategies explain how each objective is achieved.

Where necessary, tactics provide detail regarding the implementation of each strategy.
This discussion follows, in summary. A full narrative of each strategy is contained in the attached PowerPoint document (Strategic Plan). An outline of all objectives, strategies, and tactics is contained in the attached Excel Spreadsheet (Implementation Plan).

**Strategic Direction**

SSM understands cultural heritage as a vehicle for communities to draw on their past in the present, so that they can shape their own futures. Cultural heritage encompasses a range of expressive practices, including, but not limited to: musical performance, food traditions, and storytelling. Moving forward, Sandy Spring Museum will serve as Montgomery County’s connection to its diverse cultural heritage – past, present, and future.

It will:

- Advance social equity through shared authority, capacity building for folk artists and organizations, and opportunities for dialogue;
- Root assets in the places, people, products, and practices of Sandy Spring and more broadly Montgomery County. While local to Sandy Spring and Montgomery County, these tangible and intangible assets create relevance for a much broader public as symbols of the American experience;
• Connect people to the area’s past, present, and possible futures through an unrestricted diversity of cultural practices. SSM’s expressive toolkit is not limited and may engage with any discipline at any time;
• Engage variably through expert-led, artist-led, and community-led tools;
• Produce activities in person at SSM; in locations throughout Montgomery County; in digital space; and in partnership with other non- and for-profits in the arts, culture, heritage, education, and other sectors; and
• Strive to be the most agile, authentic, and responsive community partner in Montgomery County.

The Museum will build audience for its initiatives through robust programmatic and institutional marketing efforts – with the intended outcome to maximize attendance and sales. Critically, SSM will build and promote a Change Narrative through all communications that provides repeated evidence of the impact of its activities.

This strengthened programming and increased visibility, coupled with new strategy in the area of fund development, will engage a growing number of donors, foundations, corporations, and government partners in the financial support of SSM activities. Provided with visible, enjoyable, and well-produced mechanisms through which to show their support, this family of advocates will supply Sandy Spring Museum with the financial, human, and social capital to re-invest in even more dynamic, dominant programming in the years to come.

To support these activities, SSM will make limited but critical investments in its human resources – specifically, and to start: a Director of Communications and Development, and this person’s assistant, whose focus will be on marketing and fundraising in support of the Executive Director.

This cycle of activities – dominant programming, aggressive marketing, the cultivation of family, and the diversification of revenues – when repeated year after year, will position SSM as the leader in the discussion around the importance and relevance of cultural heritage and community regionally and nationally.
Objectives

Sandy Spring Museum’s strategic vision pursues the following objectives. In five years:

| PROGRAMMING | 1 | Sandy Spring Museum’s programmatic focus on Montgomery County’s diverse cultural heritage has advanced social equity. |
| MARKETING | 2 | Sandy Spring Museum has made critical investments in its marketing, communications, and engagement infrastructure, leading to sustainable growth in its marketing practice. |
| | 3 | Sandy Spring Museum is understood and appreciated throughout Montgomery County for its programs and impact. |
| | 4 | Sandy Spring Museum has meaningfully built a diverse attendee base for events and exhibitions, leading to an increasingly robust membership. |
| FAMILY | 5 | The Museum has built and sustained a family of board, emeritus, advisors, volunteers, and funding partners that provides sustainable monetary, in-kind, and expertise-based resource. |
| REVENUES | 6 | Sandy Spring Museum has grown and diversified its annual contributed revenues with an increased focus on foundation support, memberships, and individual giving. |
| CAPACITY AND CAPITAL | 7 | The Museum has made necessary investments in human and physical infrastructure to aide a sustainable, joyful, and risk-tolerant environment. |
| PLAN MAINTENANCE | 7 | SSM regularly revisits, revises, and maintains this plan. |
Key Strategies

**PROGRAMMING**

Objective 1: Sandy Spring Museum’s programmatic focus on Montgomery County’s diverse cultural heritage has advanced social equity.

The Museum will support recalibration and growth in four key areas:

a. Collections  
b. Events and Programs  
c. Exhibitions  
d. Artist Support

<table>
<thead>
<tr>
<th>Program</th>
<th>Maintain</th>
<th>Expand / Enhance</th>
<th>Reduce</th>
<th>Cease</th>
<th>Introduce</th>
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</thead>
<tbody>
<tr>
<td><strong>Collections</strong></td>
<td>Digital Archives</td>
<td>Use of collections in programs and events</td>
<td>Reduce</td>
<td>Cease</td>
<td>Activate underrepresented stories through reparative and inclusive practices</td>
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<td></td>
<td></td>
<td>Equity in Metadata</td>
<td></td>
<td></td>
<td>A collections plan</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Deaccession, as dictated by the collections plan</td>
</tr>
<tr>
<td><strong>Events &amp; Programs</strong></td>
<td>Summer Beer &amp; Wine</td>
<td>Diversity of communities represented in programs</td>
<td>Reduce monthly HHH</td>
<td>Introducing last-minute programs</td>
<td>Big picture, long-term programs on the following themes:</td>
</tr>
<tr>
<td></td>
<td>Gardens</td>
<td></td>
<td>and replace with new</td>
<td></td>
<td>Social cohesion</td>
</tr>
<tr>
<td></td>
<td>Bluegrass Jam</td>
<td></td>
<td>showstopper programs</td>
<td></td>
<td>(programming for cross-cultural engagement)</td>
</tr>
<tr>
<td></td>
<td>Strawberry Festival</td>
<td></td>
<td></td>
<td></td>
<td>Equity in Metadata</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Immigration</td>
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<td></td>
<td></td>
<td>Institutional partnerships including Smithsonian</td>
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<td></td>
<td></td>
<td>Folklife Festival</td>
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<td></td>
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<td>McCoLore</td>
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</tbody>
</table>
MARKETING

Sandy Spring Museum’s marketing will consist of three, primary efforts:

a. Building Blocks: Critical investments to establish the marketing operation.
b. Institutional Marketing: Building general awareness, enthusiasm and excitement.
c. Programmatic Marketing: Converting that awareness into participation and revenue.

Objective 2: Sandy Spring Museum has made critical investments in its marketing, communication, and engagement infrastructure, leading to sustainable growth in its marketing practice, including:

<table>
<thead>
<tr>
<th>Program</th>
<th>Maintain</th>
<th>Expand / Enhance</th>
<th>Reduce</th>
<th>Cease</th>
<th>Introduce</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exhibits</td>
<td></td>
<td>Interactive, large-scale installations</td>
<td>Reduce from 4/Year to 3/Year</td>
<td>Exhibitions that are strictly art Vignette exhibitions</td>
<td>“Basement Empire” Concepts that cross cultures and time (like corn) Simple exhibits created in partnership with writers (writers reacting to artifacts on exhibit)</td>
</tr>
<tr>
<td>Artists</td>
<td></td>
<td>Traditional artists in gift shop Traditional organization-in-residence program Support of traditional artists</td>
<td>Studio artists who don’t interact with public</td>
<td>Folklife gift registry &amp; performers list for private events Traditional artist-in-residence program</td>
<td></td>
</tr>
</tbody>
</table>
a. Optimizing the CRM/database in order to effectively capture, analyze, and activate necessary data, and to facilitate the relationship between marketing and fundraising (e.g. to manage consumer pathway from attendee to member to donor).
b. Adequate human resources, including a Director of Communications and Development.
c. A strengthened ability to operate in other languages.
d. Periodic website enhancements, as needed.
e. An enhanced direct marketing budget based on increased understanding of what is working to draw patrons to events.
f. Reevaluation of the name of the organization.

_Institutional Marketing_

**Objective 3: Sandy Spring Museum is understood and appreciated throughout Montgomery County for its programs and impact.**

A robust Institutional Marketing effort will articulate the importance, legacy, and impact of the work of Sandy Spring Museum.

Annual and one-time efforts will amplify a *Change Narrative* that clearly, concisely, and definitively articulates SSM’s value proposition and that answers the questions: “Why does Sandy Spring Museum matter?” and “What positive community changes are due to Sandy Spring Museum’s programming?”

This process has clarified that Sandy Spring Museum seeks positive change in four key areas:

a. Individuals / Individual Story  
b. Community / Story  
c. Cultural Heritage  
d. Equity
A typical annual institutional marketing plan may resemble the following, with each of the spike moments helping to convey the impact of SSM’s work in the four major areas above:

<table>
<thead>
<tr>
<th>Month</th>
<th>Initiative</th>
<th>Individual</th>
<th>Heritage</th>
<th>Story / Cohesion</th>
<th>Equity</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>Thematic Programming Announcement</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>February</td>
<td>Exhibition 1, Annual Report</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>March</td>
<td></td>
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<tr>
<td>April</td>
<td><em>Folklife Apprenticeship Celebration</em></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>May</td>
<td><em>Season Announcement; Membership Mixer</em></td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>June</td>
<td>Strawberry Festival; Exhibition 2; Summer Beer &amp; Wine Gardens</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>July</td>
<td>Summer Beer &amp; Wine Gardens</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>August</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>September</td>
<td>Summer Beer &amp; Wine Gardens</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>October</td>
<td>Exhibition 3</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>November</td>
<td>Archives Showcase</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>December</td>
<td>Holiday Party</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
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</tbody>
</table>
Programmatic Marketing

Objective 4: Sandy Spring Museum has meaningfully built a diverse attendee base for events and exhibitions, leading to an increasingly robust membership.

The programmatic marketing effort will focus on seven key strategies:

a. A budget-level differentiation between informational and missionary campaigns.
b. Deepen easiest relationships first and build from there.
c. Consistent affinity outreach and engagement.
d. Aggressive data capture and analysis to inform decision-making and a segmented approach to customer communication.
e. A CRM that effectively aggregated customer preferences to inform that marketing, as well as create a pathway to philanthropic involvement.
f. An augmented pre-event, on-site, and post-event experience that consistently exceeds expectations.
g. A robust, well-groomed website and an aggressive, multi-channel social media effort.

Objective 5: The Museum has built and sustained a family of board, emeritus, advisors, volunteers, and funding partners that provides sustainable monetary, in-kind, and expertise-based resource.

To achieve Sandy Spring Museum’s “Ideal Board” – the board Sandy Spring Museum will require by 2028 to flourish – the Museum Board will:
a. Maintain its size of approximately 20 members who can satisfy the charter commitments (see charter below).
b. Grow and maintain a minimum give / get of $3,000.
c. Actively pursue a Board composition representative of the SSM constituency, including in reference to ethnicity, race, gender, ability, class, age, and sexual orientation.
d. Build its ability, through recruitment, to connect the Museum to key area industries, including financial services, technology, healthcare / wellness, retail / consumer, hospitality / tourism, bio / health services, energy, and food and beverage production.
e. Include representatives of communities served by, or of special interest to SSM, including local, diverse communities; leaders of other area non-profit institutions and major community events; local educators, principals, and superintendents; and young professionals.
f. Institute a project-based engagement approach, wherein each Board Member adopts one project in support of the institution’s programmatic, fundraising, or marketing efforts each year.
g. Revise board committee structure.
h. Maintain aggregate giving the equivalent of 25% of total organizational expenses.

Board Charter

<table>
<thead>
<tr>
<th></th>
<th>2028</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Board Meetings</strong></td>
<td>4/year + 1 immersion (optional)</td>
</tr>
<tr>
<td><strong>Committees</strong></td>
<td>1 committee</td>
</tr>
<tr>
<td><strong>Engagement</strong></td>
<td>1 project/year</td>
</tr>
<tr>
<td><strong>Give / Get</strong></td>
<td>$3,000</td>
</tr>
<tr>
<td><strong>Family</strong></td>
<td>Support the recruitment of 2 new family members each year</td>
</tr>
<tr>
<td><strong>Baseline Time Commitment</strong></td>
<td>22 hours (meetings); 10 hours (project); 4 hours (events): 36 Hours/year</td>
</tr>
<tr>
<td><strong>Term Limits</strong></td>
<td>Initial Three-Year Term; Annual Review by Charter; Renewable</td>
</tr>
</tbody>
</table>
Objective 6: Sandy Spring Museum has grown and diversified its annual contributed revenues with an increased focus on foundation support, memberships, and individual giving.

Revenue growth and diversification will be achieved through the following strategies:

a. An institution-wide culture of philanthropy.
b. A refocused Annual Campaign that differentiates strategies for entry/mid-level donors and for major donors.
c. A rolling menu of targeted campaigns – fundraising efforts built around specific initiatives – that invite donors to support specific, targeted initiatives identified by staff leadership that are in line with their own personal philanthropic interests.
d. An organization-wide effort to convert special event attendees into donors.
e. Accelerated efforts in the areas of Foundation and Corporate support, including 1-2 new foundation grants per year.
f. A Comprehensive Campaign that supports the Master Plan.

Objective 7: Sandy Spring Museum has made necessary investments in human and physical infrastructure to aide a sustainable, joyful, and risk-tolerant environment.

a. Sandy Spring Museum will make key investments in human resources, including and specifically a Director of Communications and Development in 2023.
b. SSM will seek to maintain an average of six months of working capital for the duration of the plan.
c. The Museum will seek to construct and open the new “folklife hub” by 2026.

**PLAN MAINTENANCE**

**Objective 8: Sandy Spring Museum regularly updates and re-calibrates this plan.**

SSM will regularly update and re-calibrate the strategic plan, hosting semi-annual reviews, conducted by the Strategic Planning Committee, to evaluate progress against the plan and suggest re-calibrations. The Executive Committee and staff leadership will conduct quarterly reviews to evaluate progress against the plan and suggest re-calibrations.

In 2027, Sandy Spring Museum will revise and update this plan, or undertake a new planning process.

**V. Implementation Plan**

The implementation plan outlines significant milestones in the execution of the above strategies and identifies a party responsible for each.

The following key priorities for 2023 were developed to provide Sandy Spring Museum with its first steps in the execution of this plan:

1. Ensure adequate human resources, including a Director of Communications and Development.
2. Promote an Impact Narrative that articulates the impact of SSM.
3. Use POS interaction, annual surveys, interrupt surveys, focus groups, and/or lobby kiosk to gather data from current audiences.
VI. Financial Plan

Lastly, a financial plan was developed to balance these aspirations against a budget that is at once realistic and aspirational.

This financial plan does not function as a recommended budget for the five years; rather it seeks to explain, in financial terms, the revenue and expense implications of the decisions made in the planning process. While it will doubtless require editing as Sandy Spring Museum moves forward, it is intended to serve as a baseline for each year’s budget discussion and as a template for long-term financial forecasting.

VII. Additional Sources

This Executive Summary is accompanied by the following, additional, sources:

- A PowerPoint deck to be used for both internal and external communication of the plan’s primary objectives, strategies, and tactics.
- A complete implementation plan for the five-year period (Microsoft Excel Spreadsheet, including Objectives, Implementation Plan and Top Implementation Priorities).
- A complete environmental and internal analysis.
- A complete financial plan, with assumptions, for the five-year period.