



MUSEUM OF THE SHENANDOAH VALLEY

STRATEGIC PLAN
2021-2026

SUMMARY
MAY 18, 2021

MISSION:

The Museum of the Shenandoah Valley is dedicated to preserving and enriching the cultural life and heritage of the Valley.
(Approved by the Board of Directors July 10, 2012)

VISION:

The Museum of the Shenandoah Valley (MSV) seeks to expand its reputation as a regionally and nationally known museum complex that tells the story of the art, history, culture and heritage —past and present, of the great valley for which it is named. We are committed to collaborating and partnering with local, regional, and national institutions for research, exhibitions, and educational programs of the highest quality. In the next five years, the MSV will continue to build on the strong foundation established by its founders and its dedicated board, staff and volunteers. We will:

- **Develop and implement a Sustainable Master Plan**
- **Maintain and grow reputation as a center for art, educational programming, and scholarship related to the MSV’s mission and resources**
- **Increase collections, broaden access, and serve as good stewards for our objects, buildings, and landscapes**
- **Build the MSV “family” by increasing membership and donors, attracting new audiences onsite and online, and recruiting and retaining a diversified board, staff, and volunteer corps**
- **Serve as the cultural center of the region, a “must-see” destination**
- **Diversify the sources of revenue to ensure a sustainable financial environment**

VALUES:

The Museum of the Shenandoah Valley (MSV) believes in a society that is inclusive in practice and where equal opportunities and equitable outcomes are hallmarks. The MSV is committed to developing and supporting a diverse, equitable, accessible, and inclusive community, where the common goal is to create and foster a sense of belonging. This inclusive approach provides the MSV the foundation to enriching the cultural life and heritage of the Valley while preserving our robustly diverse history.

These are the values in which the MSV thrives:

Accessibility: We strive to provide a welcoming environment of engaging and meaningful experiences that can be accessed by all.

Collaboration/Engagement: We embrace the commitment to working together with our community and stakeholders as we endeavor to achieve excellence.

Community: We contribute to the regional community by employing material culture, past and present, to explore and celebrate the cultural diversity of our region.

Diversity: We strive to ensure multiple perspectives are invited and represented in all we do.

Education: We place learning and scholarship about the art, history, and the material culture of the Shenandoah Valley at the forefront of our activities, providing visitors with engaging and enriching experiences.

Equity: We strive to recognize differences and seek to provide resources to equalize opportunity.

Excellence: We strive to provide and deliver the best museum experience for all guests.

Fun: We are dedicated to providing an enjoyable experience for all.

Inclusivity: We are committed to cultivating and nurturing a sustainable environment of equitable participation that lends itself to feedback and continuous improvement.

Preservation: We are dedicated to caring for our collections, historic properties, and surrounding landscapes, while serving as a resource for our community as stewards of the material culture of the Valley.

Respect: We are committed to an environment that welcomes and values diversity that enriches the museum experience.

MSV Strategic Plan Objective 1 Overview: DEVELOP AND IMPLEMENT A SUSTAINABLE MASTER PLAN

<p>General Outcome 1.1: Continually revise and implement a sustainable Master Plan that considers the future of the Museum campus as a whole, rather than as fragmented components by providing a tool for practical day-to-day decisions as well as communicating the MSV’s vision for the future.</p>	<p>General Outcome 1.2: Utilizing the individual components of the Master Plan, maintain and improve facilities, landscapes, and physical infrastructures for the museum campus and properties in tandem with programming and defined strategic objectives.</p>	<p>General Outcome 1.3: Develop and enhance technology infrastructure and systems in support of all Strategic Plan objectives.</p>
<p>Action/Tasks:</p> <ul style="list-style-type: none"> Review 2014-2020 MP and evaluate completed projects, future operational needs, to redefine a Functional Program Develop a Functional Program, Architectural Plan, Landscape Management and Maintenance Plan, and a Facilities Management and Maintenance Plan Develop a revised Master Plan, complete with timelines and workplans 	<p>Action/Tasks:</p> <ul style="list-style-type: none"> Implement an Architectural Plan Implement a Facilities Management and Maintenance Plan for all buildings (on campus and satellite) Develop a prioritized workplan of facility and system improvements and upgrades Implement Landscape Management and Maintenance Plan Develop a prioritized workplan of landscape and related equipment improvements and upgrades 	<p>Action/Tasks:</p> <ul style="list-style-type: none"> Inventory and assess current technology infrastructure Inventory and assess current technology tools, hardware, and equipment Inventory and assess current software applications Develop and implement a workplan for technology upgrades
<p>Supporting Actions:</p> <ul style="list-style-type: none"> Convene MP Committee for regular meetings Review 2014 plan; cite completed projects; identify remaining projects; eliminate nonviable projects With senior staff and consultants, identify functional programming needs for site Identify projects, phasing of projects, and estimated project costs for a revised/amended cohesive MP With consultants, complete functional program and corresponding Architectural Plan With consultants, and Garden Committee, finalize Landscape Management and Maintenance Plan With consultants, complete Facilities Management and Maintenance Plan 	<p>Supporting Actions:</p> <ul style="list-style-type: none"> Convene regular meetings of Senior Staff and consultants, with Master Planning Committee, Buildings Committee, and Gardens and Grounds Committee for review and completion of cited plans Regular review of functional program for buildings and landscapes Continually review and adapt Architectural Plan, Facilities Management and Maintenance Plan, and Landscape Management and Maintenance Plan according to current operational procedures and industry best-practices Incorporate innovative solutions to challenges and needs related to DEAI With Master Planning and Building Committees, Senior Staff, and the Board, develop a prioritized workplan 	<p>Supporting Actions:</p> <ul style="list-style-type: none"> Develop technology matrices, including infrastructure, technology tools, hardware, equipment, software, and online applications Develop prioritized improvement plans with estimated costs With Senior Staff and consultants, develop and implement a workplan for technology upgrades

MSV Strategic Plan Objective 2 Overview: MAINTAIN AND GROW REPUTATION AS A CENTER FOR ART, EDUCATIONAL PROGRAMMING, AND SCHOLARSHIP RELATED TO THE MSV MISSION AND RESOURCES

<p>General Outcome 2.1: Continue to build upon and develop education programs for adults, students, youth, and families</p>	<p>General Outcome 2.2: Utilize MSV green spaces (Gardens, Trails, and Rose Hill) for educational programming</p>	<p>General Outcome 2.3: Continue to develop Shenandoah Valley-themed exhibitions related to art, history, culture, and landscape</p>	<p>General Outcome 2.4: Publish and present original scholarship relating to the MSV collection and properties, and the heritage, material culture, and natural environment of the Shenandoah Valley</p>
<p>Action/Tasks:</p> <ul style="list-style-type: none"> • Maintain calendar of mission-specific programs for adults, families, schools • Host activities for MSV family-friendly community programs • Maintain/refine school program offerings with teachers and students • Evaluate all programs • Collaborate with other Valley orgs on programs • Provide online educational programming for youth and adults • Develop/present accessible programs for people with special needs 	<p>Action/Tasks:</p> <ul style="list-style-type: none"> • Foster interdepartmental dialogue and planning re: programs and plantings • Utilize Trails in programming • Maintain programming and interpretive materials at Rose Hill 	<p>Action/Tasks:</p> <ul style="list-style-type: none"> • Collaborate with regional artists and organization to generate content and exhibitions • Develop exhibitions in-house on Valley themes 	<p>Action/Tasks:</p> <ul style="list-style-type: none"> • Contribute to Valley scholarship through research and exhibitions • Research history of enslavement in Valley and MSV sites • Serve as a resource for researchers and scholars • Utilize scholarship in presenting programs
<p>Supporting Actions:</p> <ul style="list-style-type: none"> • Maintain prog. schedule • Use planning tools • Evaluate programs with consistent instrument • Network with teachers, students, community organizations • Partner with community organizations to ensure program accessibility 	<p>Supporting Actions:</p> <ul style="list-style-type: none"> • Create planning document aligning planting with programs • Include Trails in school/youth programs • Coordinate with FCPR on Rose Hill programs 	<p>Supporting Actions:</p> <ul style="list-style-type: none"> • Create MOUs with partners • Continue Art in the Halls • Continue outdoor exhibitions • Create digital/virtual exhibition components • Continue Staff research and scholarship 	<p>Supporting Actions:</p> <ul style="list-style-type: none"> • Continue digitization of WGFP and collections, publish related scholarship • Conduct archeological investigations • Publish articles, blog posts • Maintain access to collections/archives • Create virtual exhibitions • Present at conferences • Continue research on objects and sites • Invite experts to speak at MSV

MSV Strategic Plan Objective 3 Overview: INCREASE COLLECTIONS, BROADEN ACCESS, AND SERVE AS GOOD STEWARDS FOR OUR OBJECTS, BUILDINGS, AND LANDSCAPES

<p>General Outcome 3.1: Continue to collect and exhibit objects of significance that represent the art and material culture of the Shenandoah Valley</p>	<p>General Outcome 3.2: Maintain good stewardship of, and improve internal access to, the MSV Collection</p>	<p>General Outcome 3.3: Increase virtual accessibility of the MSV Collection, buildings, and landscapes</p>	<p>General Outcome 3.4: provide engaging in-person experiences with the MSV Collection through display and interpretation</p>
<p>Action/Tasks:</p> <ul style="list-style-type: none"> • Pursue acquisitions and loans reflecting groups, subjects not traditionally represented or underrepresented • Cultivate collectors and potential donors • Pursue institutional loans for Trails and Exhibitions • Grow membership of and learning opportunities for Gaunt Collectors Society • Encourage stewardship of Shenandoah Valley objects in private and institutional collections • Review, revise, and adopt Rapid Response Collecting policies 	<p>Action/Tasks:</p> <ul style="list-style-type: none"> • Deaccession objects that are duplicates, inappropriate, irrelevant, and/or do not fulfill the MSV’s mission • Complete full collection inventory • Obtain new insurance appraisals f • Develop/install compact storage system • Update/deploy disaster kits • Implement PastPerfect Web Edition (Collections Software) • Develop paid archaeological and collections internships 	<p>Action/Tasks:</p> <ul style="list-style-type: none"> • Develop virtual/ digital exhibitions • Develop Virtual Tours with variety of topics/pov • 3d scan/model select objects, architectural & landscape features • Use virtual platforms to link the MSV Collection to campus, buildings, and landscapes • Implement live streaming cameras along Trails and/or Gardens 	<p>Action/Tasks:</p> <ul style="list-style-type: none"> • Develop a strategy to revise interpretation, renovation of the Shenandoah Valley Gallery • Develop, present installations, exhibitions drawn from the collection • incorporate previously untold stories in installations and exhibitions • Provide visitor-centered interpretation, programs for objects/exhibitions drawn from the MSV Collection
<p>Supporting Actions:</p> <ul style="list-style-type: none"> • Determine criteria for potential acquisitions and loans • Update inventory • Develop/strengthen relationships with representative communities • Locate and pursue potential loans • Develop a calendar of GCS study trips and programs • Utilize MSV Collections blog and social media, in person or virtual programming to address caring for Valley objects • Commission sculpture from contemporary artists • Develop installations/ artist initiatives 	<p>Supporting Actions:</p> <ul style="list-style-type: none"> • Pursue deaccessioning • Prioritize objects as part of Disaster Plan preparations • Photograph objects with no/poor image • Identify number of objects requiring appraisal • Utilize specialized appraisers for JWG and SVC • Pursue Compact Storage • Cleanup data in existing database, transfer data • Budget/secure funds for internship • Interview, hire interns 	<p>Supporting Actions:</p> <ul style="list-style-type: none"> • Develop, implement, standardize data entry • Research online exhibit and virtual platforms • Extend licenses and permissions • Select, scan, print objects; related programming • Create virtual Trails, Glen Burnie site history tours • Identify suitable live-streaming locations on MSV campus • Integrate livestreaming platform onto MVS website 	<p>Supporting Actions:</p> <ul style="list-style-type: none"> • Conduct formative evaluation and focus groups re: SVG • Develop an interpretive plan for SVG • Research exhibit design companies and contractors • Identify groups whose stories have been untold or under-told • Engage African American community to review relevant content • Stay up to date with museum education research, audience research, interpretation trends and techniques

Continued

MSV Strategic Plan Objective 3 Overview: INCREASE COLLECTIONS, BROADEN ACCESS, AND SERVE AS GOOD STEWARDS FOR OUR OBJECTS, BUILDINGS, AND LANDSCAPES

General Outcome 3.5: Increase visitor access to MSV landscapes	General Outcome 3.6: Maintain buildings and landscapes following industry best practices
Action/Tasks: <ul style="list-style-type: none">• Continue to develop secondary rustic trails• Revise ADA accessibility plan for formal garden areas that are currently inaccessible• Create new accessible garden entrance via the South Lawn	Action/Tasks: <ul style="list-style-type: none">• Continue to update and follow departmental manuals and procedures• Establish a protocol, begin removal of invasive species on the Trails; replant with appropriate species• Adopt a Landscape Management Plan
Supporting Actions: <ul style="list-style-type: none">• Identify trail routes and features in the MSV forest and campus• Determine feasibility of physical ADA access• Consider non-physical measures for access• Realign garden ticketing infrastructure• Provide paved access through the South Lawn to gate	Supporting Actions: <ul style="list-style-type: none">• Conduct internal audit of each department's standing rules and procedures• Codify Pest Management Plan• Develop, implement annual Garden Maintenance Plan• Develop, implement Annual Maintenance Plan for All Buildings• Maintain Garden Rental/Event Protocol• Develop, formalize protocol, 5-year schedule for invasive species removal• Identify additional partners and volunteer groups, establishing MOU for partnerships

MSV Strategic Plan Objective 4 Overview: BUILD THE MSV FAMILY BY INCREASING MEMBERS AND DONORS, ATTRACTING NEW AUDIENCES ONSITE AND ONLINE, AND RECRUITING AND RETAINING A DIVERSIFIED BOARD, STAFF, AND VOLUNTEER CORPS

<p>General Outcome 4.1: Increase and diversify onsite and online visitation</p>	<p>General Outcome 4.2: Increase membership households</p>	<p>General Outcome 4.3: Increase donors to ensure financial stability for the organization</p>	<p>General Outcome 4.4: Recruit and retain board members, committee members, and volunteers with a broad range of perspectives to better inform our mission</p>
<p>Action/Tasks:</p> <ul style="list-style-type: none"> • Maintain digital educational programs • Increase production of digital community programs • Continue modifying marketing strategy to reach target audiences • Use data to identify demographic gaps in MSV family as well as strength and weaknesses 	<p>Action/Tasks:</p> <ul style="list-style-type: none"> • Evaluate technology solutions for data driven acquisition and retention efforts • Evaluate current membership offerings, levels/benefits • Increase membership promotion at all MSV programs, events, etc. • Continue membership promotions through social media, e-mail, radio, website, etc. 	<p>Action/Tasks:</p> <ul style="list-style-type: none"> • Track new donors and retention efforts through technology solutions • Identify and implement strategies to increase donor households • Design engagement/retention procedures for new donors • Increase donor involvement • Establish an employee giving campaign 	<p>Action/Tasks:</p> <ul style="list-style-type: none"> • Recruit and retain diversified board, committee, and volunteers • Refine and improve Board training program • Refine and revise current volunteer program to diversify volunteer corps • Develop new volunteer opportunities with lower time commitment • Provide training and continuing education for volunteers • Create a Young Professional Arts Leaders Program
<p>Supporting Actions:</p> <ul style="list-style-type: none"> • Continue to develop and offer virtual and hybrid programs for audiences • Update website to allow proper distribution • Target identified audiences • Build email database • Provide easy method for visitors to share emails • Promote Museums for All with local nonprofits • Analyze visitor data 	<p>Supporting Actions:</p> <ul style="list-style-type: none"> • Track ROI for each renewal and acquisition campaign • Tech to track referrals • Software for digital membership cards • Create fun membership add ons • Plan annual membership promotion strategy • Work with Arts and Education Division on bilingual and print materials 	<p>Supporting Actions:</p> <ul style="list-style-type: none"> • Track and refine donation metrics; Moves Management • Create new membership levels • Update membership materials • Create and track donor metrics to incentivize and recognize increased giving • New donor welcome package and procedure • Enhance outreach to lapsed donors • Identify key constituent targets • Offer recurring gift option for employees 	<p>Supporting Actions:</p> <ul style="list-style-type: none"> • Recruit non-traditional community members to committees • Implement applicable DEAI committee recommendations • Continue board orientation and evaluate current training • Focus volunteer activities on programs and gardens • Increase collaboration with corporate partners, high schools, and colleges • Engage volunteers through promotion, job descriptions, training, continuing education, annual luncheon, and annual trip • Create a young professionals' program to build professionalism and appreciation for the arts

Continued,

MSV Strategic Plan Objective 4 Overview: BUILD THE MSV FAMILY BY INCREASING MEMBERS AND DONORS, ATTRACTING NEW AUDIENCES ONSITE AND ONLINE, AND RECRUITING AND RETAINING A DIVERSIFIED BOARD, STAFF, AND VOLUNTEER CORPS

<p>General Outcome 4.5: Continue to recruit and retain a diversified staff through training, professional development, and communications</p>	<p>General Outcome 4.6: Increase regional engagement with external audiences such as: corporations, foundations, health systems, school systems, governments, and non-profits</p>
<p>Action/Tasks:</p> <ul style="list-style-type: none">• Increase professional development opportunities for every full-time staff• Continue to evaluate benefits available in this area	<p>Action/Tasks:</p> <ul style="list-style-type: none">• Grow Art of Business corporate partnership program• Leverage existing partnerships with schools to increase family attendance• Increase outreach to diverse community organizations
<p>Supporting Actions:</p> <ul style="list-style-type: none">• Continue to offer compliance training• Position specific seminars/training/professional development• Implement applicable DEAI committee recommendations• Include training, continuing education, and other learning opportunities for staff who engage with museum visitors utilizing and emphasizing museum education best practices• Directors encourage staff to pursue professional development opportunities• Research available benefit options during open enrollment• Benchmark benefits program with peer institutions	<p>Supporting Actions:</p> <ul style="list-style-type: none">• Annual communications plan with Chamber• Establish process for recording partnerships in Patron Manager• Work with principals or leadership to connect with schools• Promote <i>Museums for All</i> program• Explore demographic tracking options for admission and memberships• Continue email sign up at all outreach activities• Collect email and addresses for target institutions• Continue to encourage staff volunteerism• Seek out organizations that serve target audiences• Establish partnerships with local preschools and related non-profits

MSV Strategic Plan Objective 5 Overview: SERVE AS A CULTURAL CENTER OF THE REGION- A “MUST-SEE” DESTINATION

<p>General Outcome 5.1: Establish a reputation as a cultural center and park providing a distinct regional experience.</p>	<p>General Outcome 5.2: Inspire pride of place in the Valley and promote affinity for the MSV through accessibility to art, history, material culture, and landscapes.</p>	<p>General Outcome 5.3: Establish the MSV as a destination for lifelong repeat and/or routine visitation.</p>	<p>General Outcome 5.4: Increased participation and visitation through embracing and audience focused approach to all aspects of the MSV.</p>
<p>Action/Tasks:</p> <ul style="list-style-type: none"> • Be the premier visual art destination in the Valley • Present outstanding Changing Exhibitions from outside organizers • Valley-themed content related to heritage and experience • Trails installations and programs for education and leisure 	<p>Action/Tasks:</p> <ul style="list-style-type: none"> • Inclusive cultural experience • Multi-lingual interpretation • Experiences for those with disabilities and special needs • Follow ADA guidelines and recommendations 	<p>Action/Tasks:</p> <ul style="list-style-type: none"> • Annual and semi-annual community and art events • Concerts • Programs for working adults • Trails Day • Natural growth and change 	<p>Action/Tasks:</p> <ul style="list-style-type: none"> • Conduct evaluation for exhibitions and programs • Develop, record, and analyze visitation statistics and visitor feedback • Technological engagement • Promote beneficial impact of MSV on quality of life • Maintain a clean and safe campus • Adapt to trends to stay relevant • Convert Trails users into Museum visitors
<p>Supporting Actions:</p> <ul style="list-style-type: none"> • Exhibitions/installations • Educational programs • Gallery renovations • Gallery rotations • Scholarship on local subjects • Outdoor exhibitions and programs on Trails • Permanent installations on grounds 	<p>Supporting Actions:</p> <ul style="list-style-type: none"> • Provide accessibility for all audiences • Staff training • Language translation • Experiences for those with special needs or considerations • Use of technology to provide enhancement to visitor experience 	<p>Supporting Actions:</p> <ul style="list-style-type: none"> • Generate revenue • Policies and procedures • Schedule • Trails Day/Field Day • Festivals and Fairs • Invitational and juried artist initiatives • Utilize evening hours for adult community programs • Collaborative community events 	<p>Supporting Actions:</p> <ul style="list-style-type: none"> • Analyze data to inform programming decisions • Observe trends and provide content to match • Implement in new feedback systems • Digital membership cards and apps • Maintain good optics for the site

MSV Strategic Plan Objective 6 Overview: DIVERSIFY THE SOURCES OF REVENUE TO ENSURE A SUSTAINABLE FINANCIAL ENVIRONMENT

<p>General Outcome 6.1: Increase membership revenues to secure a pipeline of future major donors and planned givers through continued implementation of technology solutions.</p>	<p>General Outcome 6.2: Continually evaluate financial operations by monitoring, amending, eliminating, and developing as needed policies, procedures, and programs that encourage better methods of communication, budget forecasting and planning, and sustainable growth models based on actual expenditures and revenues.</p>	<p>General Outcome 6.3: Diversify and increase revenues through new and increased contributions and earned-income activities.</p>	<p>General Outcome 6.4: Develop expanded treasury function to ensure organizational longevity and sustainability.</p>
<p>Action/Tasks:</p> <ul style="list-style-type: none"> • Integrate CRM, Patron Manager with POS system • Target membership growth 10% year over year • Convert members to donors at 10% year over year • Launch Member portal 	<p>Action/Tasks:</p> <ul style="list-style-type: none"> • Maintain a diverse and responsive investment portfolio • Maintain a rolling three-year budget forecast for operations and capital projects • Develop, review, and refine financial policies according to industry best-practices • Continually evaluate and implement effective financial assessments of all programs and events 	<p>Action/Tasks:</p> <ul style="list-style-type: none"> • Increase targeted giving programs • adjust, or eliminate underperforming programs/events • Develop new programs/events with clear financial goals • Restructure Special Events/Rentals program • Develop/maintain special project/restricted accounts 	<p>Action/Tasks:</p> <ul style="list-style-type: none"> • Develop and strengthen new and existing relationships with local banks, key donors, investment managers and the GGBF to ensure necessary financial resources are available
<p>Supporting Actions:</p> <ul style="list-style-type: none"> • Complete technology matrices, workplan for improvements, upgrades, and system integrations • Regular training on innovations, software, and customer service • Research, select, and implement gamification apps to capture data from site visitors • Continually review, amend, and adapt annual print and digital marketing plans • Continually review/adapt methods for giving and membership acquisition and renewal 	<p>Supporting Actions:</p> <ul style="list-style-type: none"> • Monitor and evaluate performance of investment accounts • Meet regularly with Finance Committee and investment managers to determine annual goals; set draws accordingly • Regularly review and refine policies and procedures to increase revenues/returns • Regularly monitor/adjust expenditures in direct correlation with revenues • Review, refine existing, and develop new program and event assessment tools 	<p>Supporting Actions:</p> <ul style="list-style-type: none"> • Policies and procedures • Identify programs/events for corporate sponsorships, grants • Schedule, and targeted donor support • Implement annual communications/marketing plan • Development of MP and related workplans • Implement project/event module in Financial Management software 	<p>Supporting Actions:</p> <ul style="list-style-type: none"> • Annual meetings with Key Banks and Donors associated with the MSV • Revenue generation forecasts • Target reduction of annual draw to 4.5%, reinvest monies • Continually evaluate Board goals and expectations for growth based on operating and capital project resources • Continually review three-year forecast assumptions using real-time data