

# **Five-Year Strategic Plan Folklore Village 2021 - 2025**

## **Mission Statement**

Folklore Village creates opportunities for individuals and communities to celebrate, experience and support ethnic and traditional folklife. Folklore Village offers an ongoing program of cultural, educational and participatory folklife activities in rural Southwest Wisconsin, serving regional communities and the Upper Midwest.

## **Strategic Planning and COVID -19**

Early in 2020, as the impacts of COVID-19 and mandated social distancing became apparent, the Board of Directors realized it must modify the Strategic Plan to respond to the rapidly developing and shifting landscape. At the time of this writing, we do not know if we will be able to offer on-site programming in January 2021 or later. The overarching goals are to maintain the existence of the organization, provide programming via on-line formats, and to be prepared to resume on-site activities for the public when it is responsible to do so. Our actions are informed, as always, by our Guiding Principles and Values.

## **Guiding Principles and Core Values**

### **Cultural Understanding**

Folklore Village respects the unique cultural heritage of all peoples. It seeks to foster an understanding of one's own cultural traditions, while nurturing a respect for the values and traditions of others. Folklore Village believes that every individual has folklife traditions no matter what their background. Traditions are an important part of who we are and what makes us human.

### **Intergenerational**

Folklore Village believes that intergenerational activities perpetuate a shared sense of traditions, values and community. People of all ages need places and opportunities for joy, camaraderie, and celebration.

### **Tradition Bearers**

Folklore Village encourages the appreciation and continued vitality of folklife through the recognition and active involvement of cultural tradition bearers.

### **Participation**

Folklore Village believes that participation fosters learning, interaction, sharing and fellowship. Participation nurtures an environment that is welcoming and inclusive.

### **Diversity Statement**

The Board of Directors of Folklore Village actively encourages diversity in the leadership within the organization, including on the board itself, and when hiring staff.

### **Land Acknowledgement**

We humbly acknowledge the Ho-Chunk people, the previous caretakers of the land now cherished by the Folklore Village community.

## **Introduction**

Folklore Village is a rural Cultural Arts organization located in Ridgeway Township, midway between the Village of Ridgeway and the City of Dodgeville, in the part of Wisconsin known as the Driftless area. Through our varied and multifaceted programming, we seek to build community through sharing aspects of traditional cultures. Whenever possible we try to do this through active participation – in other words, we want our participants to not simply *watch* the dance, but to *JOIN* the dance. We believe interactions on a direct, human scale will foster understanding and acceptance, break down barriers and prejudices, and ultimately help us move towards a more peaceful world.

This Five-Year Plan has its origins in a Board Retreat held in February, 2019. At this retreat three major areas of concern were identified. These areas of concern were identified based on the results of a survey conducted amongst members of the Folklore Village community. This survey was available at events in a paper version and on the website for the period spanning 12/26/17 to 1/29/18. The three areas of concern were gleaned through reading and analyzing the thoughtful answers to the survey questions by one hundred and one survey participants. Committees

were formed and charged with assessing the organization's needs associated with each of these major areas of concern and developing initiatives to move the organization forward. The three areas of concern are:

1. Participation and Engagement
2. Finance/Funding
3. Infrastructure

### ***Participation and Engagement***

The programming we offer the public is the most visible manifestation of our values. It is crucial to retain our current client base as well as to attract new participants. This committee is responsible for examining demographics, exploring ideas related to programming in general, outreach, marketing and other topics.

### ***Finance/Funding***

To survive as a non-profit organization, we need to be fiscally responsible and maintain clear, accessible financial records. Income generated solely through our programming is inadequate to meet all our needs. We actively seek funding via grants, donations, bequests, rentals, etc. This committee is responsible for exploring what we are doing and what needs to be done to improve our financial condition into the future and to support desired growth.

### ***Infrastructure***

We are exceptionally fortunate as an organization to have the buildings and 94 acres left to us by our founder, Jane Farwell. This is our home, the site of almost all our activities, and it is our responsibility to nurture and maintain this home as well as act as responsible land stewards. This committee is responsible for assessing our needs based on four criteria: 1. Health and Safety; 2. Importance to the FV Mission; 3. Protection of Assets; 4. Cosmetics. From this they prioritized current needs and are working towards an overall work and maintenance plan. This committee is also charged with developing estimates for possible infrastructure projects that could support organizational growth.

### ***The Board of Directors and their responsibility to maintain a current Five-Year Strategic Plan***

The goal of the Board's efforts in developing the Five-Year Plan has *not* been to simply generate a document but to initiate and perpetuate a *PROCESS*. A Strategic Plan as a *process* should employ imagination, self-evaluation, critical thinking, assessment, revision, research, expansion, extension, setting new goals, etc. It is the responsibility of Board of Directors to annually evaluate the previous year's initiatives ("*year one*" of a current plan) and determine which have been met, which have not, what new initiatives need to be incorporated into the plan going forward, what needs to be added or expanded in the existing years two through five, and to then extend the plan *one additional year*. As the current "*year one*" ends, the previous "*year two*" becomes the *new "year one."* Following this process will ensure that there is always a current Five-Year plan in place. If new areas of concern arrive, future Boards may, at their discretion, add sections reflecting these new needs, and initiatives to address them.

Evaluation of how the organization is doing by the Board should be a continual process. However, in September of each year a subsection of the Board (possibly committee heads after meeting with their respective committees and reviewing the previous year) should formally document the status of current initiatives, extend the plan by a year, and produce the new version of the Five-Year Plan in time to be available to inform the budget process for the following year.

## Vision Statement

Through our offerings of ethnic and traditional music, dance, folk arts and foodways, we strive to build a community that celebrates the richness of our varied cultures and fosters an understanding of our shared humanity.

Building on our identity and reputation, our vision is to be an epicenter for cultural and folk exchange serving the population of southwest Wisconsin, the Upper Midwest, and beyond.

### **Goals**

Raise the profile of Folklore Village as a center for cultural and folk exchange serving southwest Wisconsin, the Upper Midwest and beyond; increase public awareness of our programming.

Grow the number of attendees at Folklore Village events by 10 % per year post COVID; develop programming and marketing to achieve this.

Expand current funding sources as well as developing new sources; create clear and accessible financial records.

Maintain and improve our physical plant and land.

## Initiatives

### **Participation and Engagement**

Creating a place that forms “Communities of Celebration” where every participant has an opportunity to become a co-creator and deeply invested in the community life which subsequently grows there.

**Goals:**

1. Increase attendance 10% per year until we reach capacity
2. Increase community diversity in all its expressions
3. Increase awareness of and interest in Folklore Village in surrounding communities.
4. Develop more appealing work scholarship options.

Strategy	2021	2022
<p><b>Recruit and maintain committee</b></p>	<p>Continue to build the committee and meet regularly.</p>	<p>Continue to build committee and meet regularly.</p>
<p><b>Marketing</b></p>	<p>Continue developing marketing and social media presence.</p> <p>Program Analysis: Staff will prepare an annual report showing attendance for each program, capacity for growth, profitability and other value generated, including data for previous 4 years of programs, for use of comparison by the committee.</p> <p>Recommend where best to focus marketing efforts to prioritize where we should grow to meet attendance goals.</p> <p>Provide more complete information about events, and promote earlier.</p> <p>Connect with groups, such as Madison Friends of Internationals – engage multicultural students and families.</p>	<p>Continue developing marketing and social media presence</p> <p>Promote school programs and Family Days to home-schoolers.</p> <p>Create updated video for website and social media.</p> <p>Promote to area high school theatre and music programs.</p>

<b>Programming</b>	<p>Acknowledge 50<sup>th</sup> Anniversary of Folklore Village as an organization throughout the year’s marketing and programming.</p> <p>Offer Folk Arts for Kids Days - <i>Terri working on grant funding for this.</i></p> <p>Continue to develop on-line programming along with on-site programming, include multigenerational programs, specifically billed for both children and adults.</p> <p>Offer simultaneous activities for children and adults at programs.</p> <p>Be specific with descriptions of programs, including cost of materials.</p>	<p>Leadership Workshop to train future leaders in Jane Farwell’s party planning/event planning method. Proposed to be led by <b>volunteers</b>, already fluent in this method.</p> <p>Integrate prairies into more programs (seed collecting, butterfly release, species census, etc.)</p> <p>Add intergenerational Family and Friend Day(s)—possibly seasonal.</p> <p>Continue development of both on-site and on-line programing</p>
<b>Relationship Building</b>	<p>Seek new partnerships with other cultural organizations.</p> <p>Continue to expand relationships with artists and tradition bearers.</p> <p>Establish Youth Advisory Board - <i>Tova Gorman-Baer is working on this.</i></p>	<p>Develop volunteer recognition and appreciation event; recruit new volunteers.</p> <p>Seek new partnerships with cultural organizations</p> <p>Investigate EPIC programming, Madison Children’s Museum Programming.</p>

<b>Strategy</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
<b>Recruit and Maintain Committee</b>	Continue to build committee and meet regularly.	Continue to build committee and meet regularly.	Continue to build committee and meet regularly.
	Continue developing marketing and social media presence	Continue developing marketing and social media presence.	Continue developing marketing and social media presence.

<b>Marketing</b>	Explore idea of FLV on the Road – outreach to places like Epic, John Deere in Dubuque - Barn dances would be a good type of program to bring to other sites.		
<b>Programming</b>	Folk Arts for Kids Camp Continue development of both on-site and on-line programming	Add a new cultural weekend festival Continue development of both on-site and on-line programming	
<b>Relationship Building</b>	Continue building partnerships with other cultural organizations	Continue building partnerships with other cultural organizations	

Items accomplished or put into practice-2020

1. Added 2 members to the P & E committee, including a liaison to the pending Youth Advisory Board.
2. There were limited opportunities for engagement with families due to COVID restrictions. Will continue to pursue ideas as we are able to re-open on site.
3. Folk School grew from **39** classes offered (**22** filled) in 2019, to **43** classes offered, (**14** filled, **3** in-person, **11** pivoted online, *most instructors cancelled*); attendance from 89 in 2019 to 168 in 2020.
4. Annual festivals, Fall Swedish and Midwinter continued in 2020 by creating on-line events, and a number of new events were added. One happy result of presenting on-line was significant participation from geographically diverse locations, by both attendees and artistic staff (ex: Fall Swedish Festival fiddler presenting from Sweden.)

**Initiatives**

**Infrastructure**

**Goals:**

1. Maintaining and improving our buildings and grounds

- 2. Protecting our assets
- 3. Assessing feasibility of future projects

Strategy	2021	2022
<b>Contract with a professional to evaluate condition of all buildings</b>	Select and hire, including weatherization	
<b>Create documentation and procedures for ongoing infrastructure development, maintenance, and repair – to comprehensively assess all buildings and assets to predict needs and associated costs</b>	Maintenance Calendar – take guesswork out of periodic maintenance	
<b>Recruit membership for a Working Building and Grounds Committee</b>	Build and Maintain a Buildings and Grounds Committee to lend technical expertise, volunteer time, contacts with contractors & vendors, or other resources. -Nels?	Maintain and build Building and Ground Committee, as needed. This action will probably be on-going, from year to year.
<p style="text-align: center;"><b>Priority Repairs to Buildings and Grounds</b></p> <p><b>NOTE: Addressing repairs will depend on compatibility with social distancing restrictions and/or the relaxation of restrictions</b></p>	<p>Church – repair beam &amp; replace side door</p> <ul style="list-style-type: none"> <li>• more exterior spot painting, 50% done</li> <li>• replace roof</li> </ul> <p>Men’s Bunkhouse – Brace exterior stair treads and add risers</p> <ul style="list-style-type: none"> <li>• repair storms</li> <li>• paint exterior</li> <li>• investigate replacement of heater</li> </ul> <p>Woman’s Bunkhouse – deal with drainage issues/grading, east side of building</p> <ul style="list-style-type: none"> <li>• investigate replacement of heater</li> <li>• repair screens</li> <li>• Adjust door inside so that it closes</li> </ul> <p>Outhouse - paint exterior</p>	<p>Farwell Hall – on E side of building – investigate source of water infiltration behind electrical services in basement.- <b>double check with Jim</b></p> <p>Outhouse – Repair interior door so that it closes - check if done?</p>



<p><b>Priority Repairs to Buildings and Grounds</b></p>	<p>Farwell Hall – Investigate upgrading toilets for high-use festival times  – NW corner of building – repair downspouts, drain-tile, insulation and synthetic stucco, regrade. - jim worked on some of this - <b>double check?</b>  – paint all exterior (white) trim</p> <p>Schoolhouse - tuckpoint chimney</p> <ul style="list-style-type: none"> <li>• repair or replace storms</li> <li>• paint bulletin board wall</li> <li>• paint exterior trim</li> <li>• repair squirrel-hole in North gable vent</li> </ul>	
<p><b>Prairie Maintenance</b></p>	<p>Managed by Dan Wallace  Maintenance Outlined by CPR Contract  Review Contract?  Install signage</p>	
<p><b>Plumbing Analysis associated with the bunk houses and School House</b></p>		<p>Assess feasibility and costs of installing flush toilet facilities near the bunkhouse and getting running water to this area in general</p>
<p><b>On-site residence feasibility study</b></p>		<p>Identify cost associated with constructing a dormitory building with rentable rooms and shared bathroom/toilet facilities.</p> <p>Action dependent on feasibility results and funding  – scheduled action on this may extend beyond the scope of a Five-Year Plan</p>

# Initiatives

## Funding/Finances

Securing and maintaining the financial health of the organization

In 2018, a Funding Committee was assembled as part of the Strategic Plan development. Committee members included from the Board of Directors President Maria Terres, Directors Jim Puralewski (Committee Chair) and Martha Tyner, Friends of Folklore Village President Madeline Uranek and Director Lucy Richards, and Folklore Village Executive Director Terri Van Orman. The work in 2018 laid the groundwork for this plan.

### Goals:

1. Increase cash flow to Folklore Village
2. Educate Board of Directors as to the role they play in raising money for the organization
3. Create an environment of financial stability
4. Create a “rainy day fund” which can be relied upon to help weather the financial storm resulting from unexpected occurrences

Strategy	2021	2022
<p><b>Identify Initiatives to facilitate/generate income</b></p>	<p>Develop and inaugurate a Donor/Volunteer recognition event – if COVID situation allows, possibly in the fall if a committee can be assembled</p> <p>Generate new fundraising ideas</p> <p>Develop new initiatives to increase donor base and size of donations</p> <p>Explore potential naming rights program.</p> <p>Actively research and apply for grants from both government and private entities.</p>	<p>Revisit policies on Endowment Fund and Endowed Scholarships</p> <p>Generate new fundraising ideas</p> <p>Develop new initiatives to increase donor base and size of donations</p> <p>Actively research and apply for grants from both government and private entities.</p> <p>Evaluate effectiveness of previous initiatives</p>

	Evaluate effectiveness of previous initiatives	
<b>Develop Board Financial Reports</b>	<p>Monitor and report: Financial Reports YTD monthly actual to budget report; Current YTD actual to prior YTD actual report; Categorization of expense groupings.</p> <p>Guidelines for variance explanations.</p> <p>Review and refine financial reporting as appropriate.</p> <p>Reestablish the Finance Committee for board oversight of the financial condition of Folklore Village.</p>	<p>Monitor and report: Financial Reports, etc.</p> <p>Review and refine financial reporting as appropriate.</p> <p>Track attendance growth to compare to projection</p> <p>Maintain Finance Committee, oversight of financial condition of FV</p>
<b>Implement the new fundraising effort</b>	<p>Based on Summer 2019 retreat, establish new fundraising approach, identify and assign specific fund-raising roles and responsibilities for the four areas of make connections, tell the story, make the future case, and bring in the donations. Define coordination and reporting processes. Implement.</p> <p>Develop the story of Folklore Village with a variety of verbal and written descriptions of the why, how, what of the organization. Develop versions to be used for different situations. Create accessible storage of stories.</p> <p>Build Funding/Finances Committee.</p> <p>Analyze Donor Database more deeply.</p> <p>Research possible large/corporate donors, look for those that support cultural arts, relationship building, and a better world.</p>	<p>Collect narratives about FV, document and store in an accessible manner.</p> <p>Solicit stories from community during events (over the course of a weekend, during intermissions, etc.) of memories, why FV matters, examples of life-changing happenings, etc. Add to Story file.</p> <p>Develop and refine narratives for fundraising</p> <p>Continue to build committee; find new members as needed, seek expertise in relevant fields.</p> <p>Evaluate Fundraising Effort to date – adjust approach where needed</p>

	Research sponsorship prospects.	<p>Develop a more robust Donor/Volunteer recognition program.</p> <p>Continue to research possible new large donors.</p> <p>Continue donor recognition; evaluate if recognition positively impacts level of giving.</p>
<b>Create a contingency “Rainy Day” fund</b>	If possible and with Board approval, move 50% of any surplus into new account.	If possible and with Board approval, move 50% of any surplus into new account.
<b>Cost of Living Adjustment for employees</b>	A COLA (Cost of Living Adjustment) will be initiated, which will take place in the upcoming year, and which will be readjusted yearly. This COLA will be based on a rise in the Consumer Price Index and granted to all employees.	Reevaluate and apply COLA for next year’s staff salaries

<b>Strategy</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
<b>Identify Initiatives to facilitate/generate income</b>	<p>Develop new initiatives.</p> <p>Evaluate effectiveness of previous initiatives.</p> <p>Actively research and apply for grants from both government and private entities.</p>	<p>Develop new initiatives.</p> <p>Evaluate effectiveness of previous initiatives.</p> <p>Actively research and apply for grants from both government and private entities.</p>	<p>Develop new initiatives.</p> <p>Evaluate effectiveness of previous initiatives.</p> <p>Actively research and apply for grants from both government and private entities.</p>

<p><b>Develop Board Financial Reports</b></p>	<p>Monitor and report</p> <p>Tracking attendance growth to compare to projection</p> <p>Maintain Finance Committee, oversight of financial condition of FV</p>	<p>Monitor and report</p> <p>Tracking attendance growth to compare to projection</p> <p>Maintain Finance Committee, oversight of financial condition of FV</p>	<p>Monitor and report</p> <p>Tracking attendance growth to compare to projection</p> <p>Maintain Finance Committee, oversight of financial condition of FV</p>
<p><b>Implement Fundraising Efforts</b></p>	<p>Maintain /build committee</p> <p>Evaluate Fundraising Effort; make needed adjustments</p> <p>Continue to collect, develop narratives</p> <p>Research potential donors</p> <p>Continue donor recognition; evaluate if recognition positively impacts level of giving.</p>	<p>Maintain /build committee</p> <p>Evaluate Fundraising Effort; make needed adjustments</p> <p>Continue to collect, develop narratives</p> <p>Research potential donors</p> <p>Continue donor recognition</p>	<p>Maintain /build committee</p> <p>Evaluate Fundraising Effort; make needed adjustments</p> <p>Continue to collect, develop narratives</p> <p>Research potential donors</p> <p>Continue donor recognition</p>
<p><b>Create a contingency “Rainy Day” fund</b></p>	<p>If possible and with Board approval, move 50% of any surplus into new account.</p>	<p>If possible and with Board approval, move 50% of any surplus into new account.</p>	<p>If possible and with Board approval, move 50% of any surplus into new account.</p>
<p><b>Cost of Living Adjustment for employees</b></p>	<p>Reevaluate and apply COLA for next year’s staff salaries</p>	<p>Reevaluate and apply COLA for next year’s staff salaries</p>	<p>Reevaluate and apply COLA for next year’s staff salaries</p>