

# Five-Year Strategic Plan Folklore Village 2023-2027

## 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.

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

Maintain and improve our physical plant and land.

# 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 to Strategic Plan

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

### **1. 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 was responsible for examining demographics, exploring ideas related to programming in general, outreach, marketing and other topics.

### **2. 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.

### **3. 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.

# Initiative 1

## 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 to 2019 pre-COVID levels
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	2023	2024
Recruit and maintain committee	Staff will assume primary responsibility for achieving Participation and Engagement goals	Continue to increase participation and engagement.

<b>Marketing</b>	<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 from 2019 and post-COVID years of programs, for use by the Board.</p>	<p>Continue developing marketing and social media presence.</p>
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<b>Programming</b>	<p>Continue to offer weekend festivals, barn dances, concerts, senior programming, folk school classes, school programs and partner with other related organizations, including multigenerational programs, specifically billed for both children and adults.</p>	<p>Integrate prairies into more programs (seed collecting, butterfly release, species census, etc.) as is feasible with available instructors.</p> <p>Continue development of both on-site and on-line programming</p>
<b>Relationship Building</b>	<p>Board of Directors to create Youth Advisory Board.</p>	<p>Develop volunteer and donor recognition and appreciation event; recruit new volunteers.</p> <p>Seek new partnerships with cultural organizations</p>

Items accomplished or put into practice in 2022: Returned to pre-COVID in-person activities while continuing an online presence.

## Initiative 2

### 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 the Board of Directors President Maria Terres, Directors Jim Puralewski (Committee Chair) and Martha Tyner, Friends of Folklore Village President Madeline Ura-neck 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 by executing effective fundraising initiatives.
2. Educate Board of Directors as to the role they play in raising money for the organization
4. Create a “rainy day fund” which can be relied upon to help weather the financial storm resulting from unexpected occurrences

Strategy	2023	2024
<p><b>Develop Financial Reports and Fundraising Strategies</b></p>	<p>Define and establish a Finance Committee to aid Board oversight of the financial condition of Folklore Village that will:</p> <ul style="list-style-type: none"> <li>● Analyze Donor Database more deeply. Clearly identify top donors and prospects. Build a program of personal connections and communications with top donors/prospects that are NOT about “the ask.”</li> <li>● Research possible large/corporate donors, look for those that support cultural arts, relationship building, and a better world.</li> <li>● Research sponsorship prospects.</li> <li>● Generate new fundraising ideas</li> <li>● Develop new initiatives to increase donor base and size of donations</li> <li>● Develop rack card for ways to give to FV</li> <li>● Raise \$26,000 more than originally projected</li> </ul>	<p>Continue to build the Finance Committee; find new members as needed, seek expertise in relevant fields.</p> <p>Maintain Finance Committee, oversight of financial condition of FV</p> <p>Continue to research possible new large donors.</p> <p>Monitor and report: Financial Reports, etc.</p> <p>Review and refine financial reporting as appropriate.</p>



Strategy	2023	2024
<p><b>Identify Initiatives to facilitate/generate income</b></p>	<p>Develop and inaugurate a Donor/Volunteer recognition program and/or event</p> <p>Actively research and apply for grants from both government and private entities.</p> <p>Explore the idea of FV 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.</p>	<p>Continue donor recognition; evaluate if recognition positively impacts level of giving.</p> <p>Assess Scholarship use and program Generate new fundraising ideas 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> <p>Explore the idea of FV 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.</p>
<p><b>Maintain a contingency “Rainy Day” fund</b></p>	<p>If possible and with Board approval, move 50% of any surplus into a Board-advised “Rainy Day” contingency account yearly.</p>	<p>If possible and with Board approval, move 50% of any surplus into contingency 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>

Strategy	2025	2026	2027
<p><b>Identify Initiatives to facilitate/generate income</b></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>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 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 Research potential donors</p> <p>Continue donor recognition</p>
<p><b>Strategy</b></p>	<p><b>2025</b></p>	<p><b>2026</b></p>	<p><b>2027</b></p>
<p><b>Create a contingency “Rainy Day” fund</b></p>	<p>If possible and with Board approval, move 50% of any surplus into contingency account.</p>	<p>If possible and with Board approval, move 50% of any surplus into contingency account.</p>	<p>If possible and with Board approval, move 50% of any surplus into contingency 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>

## Initiative 3

### Infrastructure

**Goals:**

1. Maintaining and improving our buildings and grounds
2. Protecting our assets
3. Assessing feasibility of future projects

Strategy	2023	2024
<b>Contract with professionals to evaluate condition of all buildings</b>	Continue to implement cost-effective repairs to Farmhouse.  Assess other buildings’ needs and implement cost-effective repairs.	Continue to implement cost-effective repairs to buildings.
<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>	For each building:  Document past construction, ongoing maintenance and major repairs.  Based on past repairs and projected needs, develop a written calendar projecting timelines for needed future maintenance and major repairs.	Perform and record needed maintenance.

<p><b>Recruit membership for a Working Building and Grounds Committee</b></p>	<p>Maintain and build Buildings and Grounds Committee, as needed, with emphasis on recruiting local participants with skills. This action will probably be on-going, from year to year.</p>	<p>Maintain and expand local participation in maintenance of buildings and grounds.</p>
<p><b>Priority Repairs to Buildings and Grounds</b></p>	<p><b>Church</b> – 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><b>Small Bunkhouse</b></p> <ul style="list-style-type: none"> <li>- Brace exterior stair treads and add risers.</li> <li>- Repair basement door</li> <li>- replace heater with electrical HVAC</li> </ul> <p><b>Large Bunkhouse</b></p> <ul style="list-style-type: none"> <li>• replace heater with electrical HVAC</li> </ul> <p><b>Outhouse</b> - paint exterior</p> <p><b>Farwell Hall</b></p> <p>Replace clerestory windows</p> <p>Investigate upgrading toilets for high-use festival times</p> <p>Investigate and repair as needed:  NW corner of building – repair downspouts, drain-tile, insulation and synthetic stucco, regrade. - Jim worked on some of this,  Farwell Hall – on E side of building – investigate source of water infiltration behind electrical services in basement.</p>	<p>Reassess and reprioritize ongoing repairs and projects.</p>

	<p>– paint all exterior (white) trim after clerestory installation</p> <p><b>Schoolhouse:</b> evaluate and repair as needed</p> <p><b>Shed:</b> Remove dilapidated “greenhouse”. Investigate using gravel pad as a blacksmith shop. Rebuild window sills. Paint shed.</p>	
<b>Prairie Maintenance</b>	<p>Managed by Dan Wallace</p> <p>Maintenance Outlined by CPR Contract, to be reviewed</p> <p>Install signage</p>	
<b>Aslak Lie house</b>	Continue construction on Aslak Lie house	Finish construction on Aslak Lie house
<b>Plumbing Analysis associated with the bunk houses and School House</b>	Assess feasibility and costs of installing flush toilet facilities near the bunkhouse and getting running water to this area in general	
<b>On-site residence feasibility study</b>	<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>	

Strategy	2025	2026	2027

Items accomplished or put into practice-2022:

Evaluation Farmhouse needs by Energy expert, started to implement recommendations by removing attic asbestos insulation, rewiring and reinsulating.

Removed mold and painted large bunkhouse beds

Replastered walls in large bunkhouse

Repaired numerous windows, partially spot-painted church

Rebuilt Schoolhouse chimney

Upgraded sewer system

Replaced a heating/cooling unit in Farwell Hall

Repaired garage cupola

Repainted front of small bunkhouse

Repainted garage.

Made major progress on Aslak Lie house – added second story and roof.