2017-2020
STRATEGIC PLAN
OUR PURPOSE AND DIRECTION

MISSION
To engage, educate and challenge a diverse audience by collecting, preserving and interpreting Richmond's history.

VISION
To be the premier source for experiencing Richmond's history, using its past to inform the present and to shape the future.

GUIDING PRINCIPLES
The principles that will guide the decisions of the organization include:
- Exceeding accreditation standards.
- Acting in a fiscally responsible manner.
- Being inclusive.
- Being proactive, outreaching and customer-focused.
- Acting as a good community partner.
- Being creative and embracing an entrepreneurial spirit.
- Being ethical.
- Being accountable – measuring outcomes and impacts.
- Being good stewards of entrusted resources, including the organization, funds and collections.
INTRODUCTION

In the Virginia Statute for Religious Freedom, Thomas Jefferson boldly proclaims, "Almighty God hath created the mind free."

In many ways, this short phrase in one of our nation's Founding documents – and the focus of the Valentine First Freedom Center – expresses the Valentine's essential work.

Freedom of mind and diversity of thought are integral to the Valentine's collections, programs, tours and even our historic downtown buildings. The Valentine is where we discover and reflect on our history. Members and visitors experience the places and engage with the objects that have defined our character and shaped our city and the nation. Open dialogue with the past enables us to collaborate as a region and to create a better future.

Valentine staff and trustees are invested in creating meaningful strategic plans, and this 2017-2020 plan is no exception. Thoughtful conversations with community representatives and guidance from our Floricane consultants have helped us to outline a direction that is both daunting and significant. The Valentine must be a nexus of ideas for the region where we open ourselves (and our minds) to consider the path forward and embrace the opportunities before us. This is our commitment:

• To convene conversations that matter to our future and to acknowledge the essential role that history plays in these conversations;

• To open our doors to an ever-evolving region and its changing stories;

• To strengthen our intellectual core by improving access to and care of our collections (the ultimate source of our community's history) and by supporting the creative work of our curators and staff.

We hope that you find our 2017 Strategic Plan to be an affirmation of a 128-year commitment to create uniquely Richmond experiences that use our past to inform the present and shape the future.

Charles N. Whitaker  
Chairman of the Board

Marjorie Grier  
Strategic Planning Lead Trustee

William J. Martin  
Executive Director
STRATEGY PROCESS

As we started this strategic planning process late in the summer of 2016, we knew it was important to strike a balance between the many initiatives already in motion at the Valentine and our aspirations for a bolder future. Inviting a diverse swath of the Valentine community into our strategic conversation was important – as were new approaches to facilitating those conversations.

We had five core groups of Valentine partners who were essential to developing a new strategic plan – our Board of Trustees, our staff, our dedicated volunteers, our Immersion Trustees, and a diverse group of stakeholders and partners (identified in the next section of this document). All of these groups invested valuable time and perspective in the process.

In July, we identified the key stakeholders to engage through the strategic process.

In August, John Sarvay and Lesley Bruno, our consultants from Floricane, began to interview these stakeholders – and to coordinate a series of eight focus groups. They also convened the entire staff, including volunteers, for a full-day brainstorming session to generate ideas, issues and opportunities to strengthen the Valentine.

Our full Board of Trustees came together in September to explore their thoughts about the Valentine’s future – and compare and contrast them with ideas generated by staff, volunteers, individual stakeholders, and focus group participants.

As we moved into October, alignment began to build across three broad themes, supported by 15 strategies.

The Valentine’s Planning Team – a core group of managers, including the director and deputy director – then helped to shape and modify the themes and strategies. Floricane and their design partners at Zeigler-Dacus created five visual displays reflecting these themes and invited input from diverse stakeholders. During this open “strategic charrette,” members of the public, as well as our board and staff, explored the visual displays in the gallery and provided feedback on the emerging framework of our new strategic plan.

With this feedback, we distilled the plan – dropping from 15 strategies to 10 more meaningful and manageable strategies.

The Board of Trustees and our Planning Team helped to further revise and refine the strategies, as well as the tactics and activities that support them, as we moved through November and December. Staff also developed a separate working document with more detailed operational steps, accountables and deadlines. The final plan was approved by the Board of Trustees in January of 2017.
STRATEGY STAKEHOLDERS

Board of Trustees
Charles N. Whitaker, Chairman
Marjorie Grier, Vice Chair and Strategic Planning Lead Trustee
Neil S. Kessler, Secretary
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Deborah W. Davis, Assistant Treasurer
Turner A. Broughton
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H. Michael Ligon
Sr. Anne Marie Mack, CBS
Ivor Massey, Jr.
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J. Edward Ukrop
Charles S. Valentine III
E. Massie Valentine, Jr.
James L. Weinberg
Marilyn H. West
Neely M. Winston
William J. Martin, Director
John C. Stanchina, Ex. Officio Emeritus
Clarence L. Townes, Jr.
Wallace Stettinius
E. Massie Valentine, Sr.
Henry L. Valentine II

2016-2017 Board Immersion Trustees
Jesse Clark
Ellen Hyun Hwang
Austin A. Jones
Emilia Penney
Thomas Perry

Valentine Staff and Volunteers
William J. Martin, Director
Sarah M. Kim, Deputy Director
PUBLIC RELATIONS & MARKETING
Domenick Casuccio, Director of Public Relations & Marketing
PUBLIC PROGRAMS & TOURS
Jeff Aronowitz, E. Claiborne Robins, Jr. Director of Public Programs
Marisa Day, Student Programs & Tours Manager
Liz Reilly-Brown, Adult Programs & Tours Manager
COLLECTIONS
Meg Hughes, Director of Collections/ Curator of Archives
David Voelkel, Elise H. Wright Curator of General Collections
Kristen Stewart, Nathalie L. Klaus Curator of Costume & Textiles
Wanda Hernandez, Latino Project Curator
Alicia Guillama, Collection Project Manager/Registrar
RETAIL AND VISITOR SERVICES
Lori Craft, Director of Retail Operations
Haley M. McLaren, Director of Development
Ashley Burch, Development Coordinator
OPERATIONS AND CAPITAL PROJECTS
Ken Myers, Director of Operations and Capital Projects
Peggy Hudert, Wedding Coordinator
FINANCE AND HUMAN RESOURCES
Donna Kolba, Director of Finance & Human Resources

PARTICIPATING PART-TIME STAFF
Laura Carr
Charlotte Humphries
Janet Lundy
Stacey Moulds
Wade Reynolds

PARTICIPATING VOLUNTEERS
Laura Berkey
Jim Kisicki
LaJuan Neal
Edson Pederson
Tre Rochenbach

Individual Stakeholders
The following individuals contributed valuable feedback via one-on-one interviews:

Ken Ampy
CEO, Astyra Corporation
Monroe E. Harris, Jr., D.M.D., Virginia Oral and Facial Surgery
Steve Markel
Vice Chairman, Markel Corporation
Marsha M. Rappley, M.D.
CEO, VCU Health
Tom Rosenthal
Wallace Stettinius
Consultant
Edward Valentine
Managing Director, Harris Williams & Co.

Stakeholder Groups
Valentine Trustees, staff and Immersion Trustees convened community members for a series of stakeholder discussions. Participants were grouped into the following categories:

Adult Learners
Arts & History Communities
Donors and Leaders
Educators (K-12)
Faith Community
Peer Institutions
Program Participants and Museum Members
Tourism and Economic Development

Consulting Support
Lesley Bruno, Floricane
George Mahoney, former Board of Trustees member
John Sarvay, Floricane
Over the course of dozens of conversations that comprised this strategic planning process, the Valentine community kept returning to three core themes – building on the Valentine’s established role as a catalyst for challenging conversations about Richmond’s past, present and future; reaching into the community in new, engaging ways; and positioning the museum for future growth.

Below is an overview of our three Strategic Themes for this planning period, and the five strategic goals and 10 tactics that support them. In the subsequent section of this document, we provide additional detail on the particulars of each strategy.

The order of these themes and goals does not imply priority. We regard each as essential.

THREE STRATEGIC THEMES

CONVENE THE COMMUNITY

Goal 1 — Initiate public conversations that matter

Tactic 1: Align our programming and exhibition content with Richmond’s regional priorities, as defined by the Capital Region Collaborative, to engage the community in Richmond’s future.

Tactic 2: Elevate the Valentine First Freedom Center as a forum for discussing the values reflected in the Statute of Religious Freedom.

OPEN MORE DOORS

Goal 2 — Expand our audiences

Tactic 1: Expand learning opportunities for children and adults.

Tactic 2: Make our collection accessible to more audiences and create exhibitions and programming that reflect Richmond’s diversity and changing community, engage new audiences and strengthen our connections with Richmond neighborhoods.

Goal 3 — Grow our sense of space

Tactic 1: Collaborate with our museum peers and the city to develop a comprehensive visitor/engagement plan that connects and energizes the Court End neighborhood and engages downtown audiences.

Tactic 2: Maximize the use of key elements of our campus – including the galleries, collections and curatorial spaces, Valentine Museum Store, Valentine Garden, Edward V. Valentine Sculpture Studio and the 1812 Wickham House.
STRENGTHEN OUR CORE

Goal 4 — Grow and develop our people and resources
Tactic 1: Provide professional development to our staff, trustees and volunteers; aspire to best practices in all areas of the museum.
Tactic 2: Significantly enhance our funding model and development strategies.

Goal 5 — Preserve what matters
Tactic 1: Preserve our historic buildings and grounds.
Tactic 2: Continue to renovate the museum based upon our existing master plan, which calls for state-of-the-art collections, storage, and research and curatorial spaces.
Goal 1 — Initiate public conversations that matter

Tactic 1: Align our programming and exhibition content with Richmond’s regional priorities, as defined by the Capital Region Collaborative, to engage the community in Richmond’s future.

- Ensure our comprehensive exhibition schedule (through 2020 for the Community Galleries & Lower Level) reflects the diversity of our community and builds on our regional priorities, as defined by the Capital Region Collaborative.

- Develop programming and events that align with the comprehensive exhibition schedule.

- Develop a Pre-K program that aligns with community-focused topics and with changes to Creative Curriculum.

- Evaluate developing new roles: Public Historian/Community Gallery Curator(s).

- Seek opportunities to engage the community with collection objects in off-campus locations through collaborative partnerships.

- Work with our community partners to connect Community Conversations to Richmond’s regional priorities and other topics that are most important to Richmond residents.

- Collaborate with the Black History Museum to incorporate African American History more fully into our entire tour program.

- Create an enhanced version of Richmond History Makers that connects more directly with the community and its regional priorities.
Tactic 2: Elevate the Valentine First Freedom Center as a forum for discussing the values reflected in the Statute of Religious Freedom.

- Fully integrate Valentine staff and Board with the mission and operations of Valentine First Freedom Center (VFFC).
- Form a special task force (to include Board and community members) to build community awareness of, and appreciation for, Richmond’s role in the creation of the Statute for Religious Freedom and to position the VFFC as a convener on religious freedom.
- Optimize the VFFC gallery space and develop a new core exhibition.
- Develop a plan to increase VFFC visitation and identify new ways to engage visitors at the Center.
Goal 2 — Expand our audiences

Tactic 1: Develop approaches to expand learning opportunities for children and adults.

- Continue to develop dialogue-based programming, including with the tour program.
- Incorporate features addressing special needs, learning styles, language differences and child/family visitors into core exhibition spaces (e.g., This Is Richmond, Virginia; 1812 Wickham House; Edward V. Valentine Sculpture Studio; etc.)
- Establish new programming that attracts and engages with diverse audiences.
- Reassess, update and develop new school programs; enhance and expand partnerships with area schools and educators; and engage area school teachers and students, with a special focus on Richmond Public Schools.
- Develop a digital strategy.

Tactic 2: Make our collection accessible to more audiences; create exhibitions and programming that reflect Richmond’s diverse and changing community, engage new audiences and strengthen our connections with Richmond neighborhoods.

- Present more exhibitions online.
- Establish a Collections Plan to guide acquisition priorities.
- Be strategic and innovative about exhibition promotion.
- Expand and strengthen our tours program.
- Offer a curated music series for the public to experience local music talent, food, beer and the Valentine.
Goal 3 — Grow our sense of space

Tactic 1: Collaborate with our museum peers and the city to develop a comprehensive visitor/engagement plan that connects and energizes the Court End neighborhood and engages downtown audiences.

- Continue to identify and develop non-traditional partnership opportunities, e.g. Civil War Emancipation Day, Court End Christmas, etc.
- Develop a corporate and higher education tour strategy that provides significant earned income opportunities.
- Create a “Court End Council” with other Court End site directors to collaborate on promoting area sites and events.
- Increase our presence and visibility at the local and regional level and develop a Public Programs marketing strategy.

Tactic 2: Maximize the use of key elements of our campus – including the galleries, collections and curatorial spaces, Valentine Museum Store, Valentine Garden, Edward V. Valentine Sculpture Studio and the 1812 Wickham House.

- Increase café sales and hours and improve the quality of customer experience.
- Grow facility rental revenue from a greater variety of private events (beyond bridal events).
- Publicize and increase interest in our collections-based programs.
- Have onsite food service provide greater support for museum’s public programming.
Goal 4 — Grow and develop our people and resources

Tactic 1: Provide professional development to our staff, trustees and volunteers; aspire to best practices in all areas of the museum.

- Develop a three-year professional development plan for the staff development grant.
- Engage all staff and volunteers through more meaningful communication and engagement opportunities.
- Improve volunteer recruitment, onboarding and retention, and rejuvenate the Volunteer Council.
- Engage Board leadership to plan for key transitions.
- Expand and better leverage Immersion Trustees program.

Tactic 2: Significantly enhance our funding model and development strategies.

- Evaluate Annual Fund membership program, benefits and member communication, and recommend changes and adjustments.
- Build stewardship efforts to recruit and retain a more diverse base of annual fund supporters.
- Cultivate a strategic Major Gifts program.
- Continue to develop our Planned Giving campaign to confirm intent of current donors and expand it to the next generation.
- Determine feasibility of, and timing for, next phase of Second Century Capital Campaign.
- Develop an endowment growth strategy to enable one-third of museum expenses to be funded by endowment income.
Goal 5 — Preserve what matters

Tactic 1: Preserve our historic buildings and grounds.

- Address moisture problem with north parapet of Sculpture Studio.
- Strengthen information security of financial and payroll data.
- Identify annual projects for Garden Master Plan (2016) consistent with available funding from the George Cole Scott McCray Endowment.
- Improve and expand Collections Care & Stewardship.
- Plan for cyclical rehabilitation of the 1812 Wickham House and Edward V. Valentine Sculpture Studio.
- Improve digital infrastructure, as well as the quantity and quality of data in the collections management database.
- Streamline off-site storage.

Tactic 2: Continue to renovate the museum based upon our existing master plan, which calls for state-of-the-art collections, storage, and research and curatorial spaces.

- Plan for renovation of the museum building (2nd and 3rd floors).
- Plan for post-renovation expansion of Research Services.
- Prepare for the move associated with the opening of the Collections Lab in the Community Galleries.
- Renovate and repopulate the 2nd and 3rd floors.