

SANDY SPRING



REQUEST FOR PROPOSALS – Phase I

Adaptive Reuse of Old Sandy Spring Bank Building

Issued by: Sandy Spring Museum, a nonprofit organization

Location: 908 Olney Sandy Spring Road, Sandy Spring, MD 20860

Proposals Due: May 1, 2026 at 4:30 P.M. ET

1. CLIENT:

Sandy Spring Museum connects diverse communities and advances social equity through shared and inspiring experiences of our region’s cultural heritage. The museum serves as the state-designated Regional Folklife Center of Montgomery County, Maryland. In support of its mission, the Museum also collects, preserves, and shares an historic collection related to the region’s cultural heritage and mines the collection to reveal stories of underdocumented people. We are known regionally for our community-generated approach and our support of underserved traditional artists and communities.

2. PROJECT OVERVIEW:

2a. Background:

Sandy Spring Museum recently acquired the old Sandy Spring Bank building, a 5500 square-foot-brick building built in 1895. The building is located within the Sandy Spring Rural Village boundaries and in the Sandy Spring Historic District. It is eligible for listing on the National Register of Historic Places for its architecture and historic significance.

The Museum is committed to investigating potential uses for the building that are aligned with the museum’s mission, responsive to community desires and financially sustainable. The museum is looking for a firm that will engage key stakeholders (board, staff, museum membership) and community and in conversations about potential use of the building, and present the board with a

minimum of three visionary, conceptual plans, **one of which will be fully developed during a second phase of work.**

The consultant is to conduct analysis, research exemplars, consider financial implications, and prepare a report with findings and recommendations with the goal of determining an adaptive reuse for the property, and potential long-term stewardship of the property. Mission-aligned, financial, supply/demand, and community benefit implications are paramount considerations.

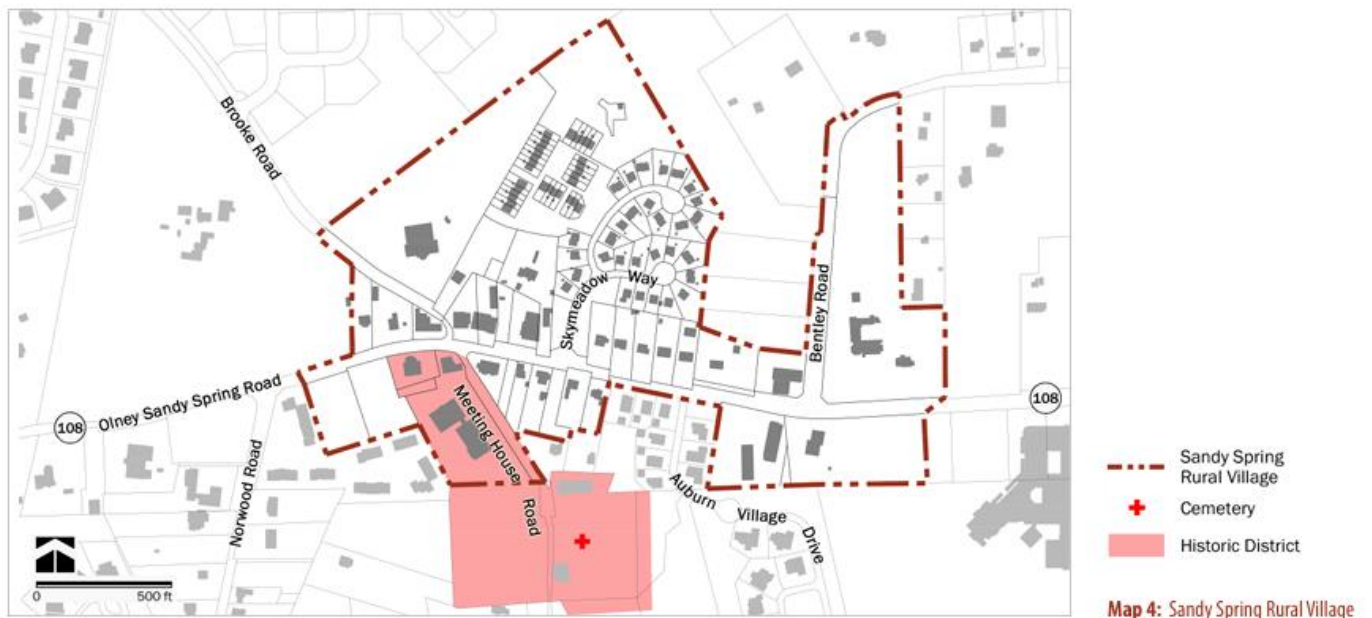
2b. Neighborhood Context:

The building is at the western edge of the Sandy Spring Historic District. Adjacent buildings located southwest of the property are residences. Immediately to the east on Rte. 108 (900 Olney Sandy Spring Road) is the office for the Flats at Sandy Spring, a 62+ senior living complex, located behind these businesses, on Meeting House Road.



2c. Future Plans for the Neighborhood:

In 2015, the county approved and adopted a new [Sandy Spring Rural Village Plan](#). This is recommended reading.



2d. Information of Note:

The building is in a historic district. No modification of the exterior may be made without approval of the Historic Preservation Office.

The building is currently zoned CRN. CRN zone permits different categories of use, some of which may be reasonably construed to be aligned with the museum's mission. The property is presently classified and permitted as a financial institution. Any other use category should be presumed to require re-classification and re-permitting and to trigger ADA and building code compliance obligations. The Board will consider purposes that require reclassification to accommodate a viable adaptive reuse.

2e. Community Input

The success of the Museum can be attributed to our commitment to involving the community in our planning processes and creating projects that respond to identified community needs. An integral part of a successful proposal will be strategic involvement of community members via in-person and virtual meetings, group meetings, online surveys, and so on. It is the responsibility of the consultant to engage a cross section of the community and document the community's participation in the planning process.

3. DELIVERABLES:

A. Background review and goals

- Meet with Subcommittee for background review and visit to museum and bank

B. Community engagement

- Host a minimum of 1 hybrid meeting with each of the following constituencies; museum staff will approve final list of participants.
 - i. Museum stakeholders, including donors, staff, and board
 - ii. The general community, including museum members, to develop goals, explain options, and generate ideas for use.
- Host a mid-project meeting with staff and board to present and get feedback on preliminary ideas

C. Research

- Conduct a regional analysis to determine what needs are not currently being met by the cultural heritage sector.
- Conduct broad research to find successful relevant examples of financially-viable, mission-driven projects from which SSM could draw ideas.

D. Report

- Host one meeting with the Board of Trustees to present a minimum of three concepts.
 - Each concept will include a detailed description of services; an identified audience; a proforma budget indicating main sources of **earned** income and operational expenses.
- Consultant is not expected to present a building renovation budget in Phase I.
- Prepare and provide status reports due September 7, 2026; October 12, 2026; and a final report due by December 31, 2026.

4. TIMELINE

Consultant is expected to begin immediately upon award, with a goal of completing the project, including final submission and approval of all deliverables, within a maximum of 4 - 6 months. Respondents should account for a period within this timeline to incorporate minor revisions into the final report.

Issuance of RFP: March 30, 2026

Pre-response information session and site visit: Wednesday, April 15, 2026 at 10 am

RFP response submission due: May 1, 2026

Selection panel interviews: week of May 11, 2026

Final selection: week of June 8, 2026

Final report must be submitted by December 31, 2026.

5. QUALIFICATIONS & EXPERIENCE OF RESPONDENTS :

Respondents whose proposals satisfy the following criteria may be eligible for higher ratings by:

- i. Demonstrating through entity experience and expertise of proposed key personnel that they are qualified to execute the proposed work;
- ii. Having successfully served in lead roles for completed projects of a similar scale and scope to the project proposed by Respondents;
- iii. Providing evidence of sufficient organizational capability to ensure successful and timely delivery of the project.

6. RFP PROPOSAL SUBMISSION REQUIREMENTS:

Proposals are due by May 1, 2026 at 4:30 pm.

The museum will determine, in its sole discretion, whether each response received is responsive to the RFP and acceptable. The decision of the museum in this regard is final and any determination on non-responsiveness will be explained to the applicable Respondent(s) upon request. Responses that do not meet the following requirements will be deemed “Non-Responsive” and will not be considered for selection.

Respondents may choose to attend a pre-bid meeting during a scheduled site visit at 10:00 A.M. ET, Wednesday April 15, 2026. Please email Sara Caporaletti at scaporaletti@sandyspringmuseum.org to confirm attendance.

6a. Format:

All submittals must be submitted as a single PDF attached to an email delivered to aweiss@sandyspringmuseum.org

Responses must respond to each RFP item in the order outlined below in the “Proposal Contents” section. Each subsection must be labeled accordingly. Responses must not exceed a total of 40 pages, excluding appendices.

6b. Proposal Content:

Project Team

The Respondent’s Project Team should be introduced and described. The “Project Team” is defined as the project lead plus any other key team members, such as architects, historians, or cultural arts and outreach specialists who are critical for consideration by the museum.

Development Partners

Identify any and all partners for the project.

Please identify (a) the decision-making individual for the entity and, if different, (b) the day-to-day lead individual who will be available to respond to questions or requests for additional information.

Financial Partners: Identify who will develop the proforma budgets.

Design Team: Identify any architects, designers, consultants, etc. included as part of the proposed team.

Other relevant team members: If applicable, please identify.

For each team entity identified in the section above, Respondent shall provide the following information for the point-of-contact at each entity: first and last name, business address, business telephone number, business email address, business title.

Respondents shall provide information that explains the relationship among team members, describes the team members' respective roles and contributions to the project, and describes the overall management of the team.

Qualification and Expertise

Respondents shall demonstrate their ability to submit a comprehensive report by citing three comparable projects with which the respondent or key individuals/partners have had primary involvement.

For each relevant project, Respondent shall identify the following:

- a) Team Name
- b) Project name or title
- c) Project location
- d) Project time period
- e) The names and contact information for team members involved in the project, along with a description of each party's role in the project;
- f) Description of project
- g) Illustrative materials that will help the museum evaluate the caliber, innovation, and relevant experience of the development team
- h) References (at least one per project), including names, mailing addresses, e-mail addresses, telephone numbers, and a letter authorizing each reference to respond

to inquiries regarding the design, financing, development, disposition, or management of prior projects.

Not to exceed amount

All costs are limited to a not-to-exceed (NTE) budget of \$30,000. This amount includes all costs incurred in connection with the work outlined herein. In no event shall the Consultant be entitled to receive more than the NTE. Competitiveness of the budget will be considered as part of the proposal review process.

7. INQUIRIES

Every request for a written interpretation or correction must be received at least ten (10) days prior to the RFP due date—no later than 4:30 P.M. on April 18, 2026—in order to be considered. Requests may be submitted by e-mail to aweiss@sandyspringmuseum.org. Sandy Spring Museum will endeavor to answer questions as they arise on a rolling basis. However, all interpretations, corrections, and supplemental instructions will be communicated by written addenda to this solicitation to all prospective Respondents no later than five (5) days prior to the RFP due date. Submission of a proposal constitutes acknowledgment of receipt of all addenda. Proposals will be construed as though all addenda had been received. Failure of the Respondent to receive any addenda does not relieve Respondents from any and all obligations under the proposal, as submitted.

8. REJECTION OF SUBMITTAL

Proposals must be delivered (electronically or physically) to the specified location and received by the proposal due date to be eligible for evaluation. Electronic submissions will be sent to aweiss@sandyspringmuseum.org and physical submissions will be sent to Sandy Spring Museum, 17901 Bentley Road, Sandy Spring, MD 20860. Proposals will be considered irregular and may be rejected if they show material omissions, additions not called for, conditions, limitations, unauthorized alternate proposals or other material irregularities. Sandy Spring Museum reserves the right to reject submittals not prepared and submitted in accordance with the provisions specified herein and reserves the right to waive any minor deviations or irregularities in an otherwise valid submittal.

9. EVALUATION AND SELECTION PROCEDURES

9a. Evaluation Procedure

Each response will be evaluated in accordance with the indicated criteria.

Special expertise of personnel, especially

- Demonstrated experience in the field of cultural arts and adaptive reuse of historic buildings
- Demonstrated experience coordinating with multiple stakeholders

Project Approach

- Names and functions of personnel assigned
- Resources
- Ability to meet project needs, including current workload
- Commitment to project completion within time and budget constraints

Technical Merit

- Demonstrated comprehension of tasks to be completed
- Completeness and clarity of submittal

9b. Award

Acceptance of the successful Respondent's proposal does not create a contractual relationship between Sandy Spring Museum and the successful Respondent. Sandy Spring Museum reserves the right to award the agreement to the next available Respondent in the event the successful Respondent fails to enter into the agreement, or the agreement with said Respondent is terminated within 30 days of the effective date.

10. EXECUTION OF AGREEMENT

Submittal of a proposal binds the successful Respondent to perform the work upon acceptance of the proposal and Sandy Spring Museum's execution of the project agreement provided by the successful Respondent.

Upon acceptance of the proposal, the successful Respondent must provide:

- Contract/Agreement for review
- Completed Form W9
- ACH payment information

- Satisfactory evidence of insurance coverage as described in Section 11 Insurance Requirements

Sandy Spring Museum reserves the right to cancel award of the agreement without liability at any time before the agreement has been fully executed by all parties. Failure upon the part of the successful Respondent to execute the agreement or timely submit the required documentation will be just cause, if Sandy Spring Museum so elects, for award of the agreement to be rescinded.

11. INSURANCE REQUIREMENTS

Respondents should be aware that an execution of any contract arising from the RFP process will require proof of the following insurance coverage, as applicable, with at least the minimum limits required by the State of Maryland:

Commercial General Liability

Each Occurrence \$1,000,000

General Aggregate \$2,000,000

Automobile Liability

Combined Single Limit \$1,000,000, - Includes Owned, Non-Owned & Hired Autos

Workers Comp

Each Accident \$1,000,000

Professional Liability

Limit Per Claim \$1,000,000

Umbrella Liability

Each Occurrence \$2,000,000

Aggregate \$2,000,000

Attachments:

Existing Building and Site Documentation includes but is not limited to the following:

- 1) Historic Preservation Background and Implications
- 2) Building inspection by Pond, Robinson and Associates
- 3) Appraisal by Cushman and Wakefield
- 4) SSM's strategic plan

CONFIDENTIAL

February 22, 2025

To: Members of the Sandy Spring Museum Board of Trustees

From: John Lyons

Re: Sandy Spring Bank: Historic Preservation Background and Implications

For your consideration in connection with the potential donation of the Sandy Spring Bank building and property (the "Property") to the Museum, this note briefly summarizes (1) the background and implications of the property's status as a historic resource within the Sandy Spring Historic District (the "SSHD"), and (2) the implications of its present zoning.

Key points:

1. As expected, the Property is subject to the Montgomery County Historic Preservation Ordinance (the "Ordinance").
2. The Ordinance will oblige the Museum to maintain the exterior features of the Property as they are, unless the Historic Preservation Commission (the "Commission") pre-approves a proposed alteration or modification of the existing structure or parking area. These historic preservation obligations are unlikely to impose costs significantly different from owning any other older property.
3. Nothing in the Ordinance would prevent the Museum from making substantial changes to the interior of the building.
4. The Property was rezoned to Commercial Residential Neighborhood ("CRN") as part of the 2015 Sandy Spring Rural Village Plan.
5. Under the CRN zone, the Property may be used for, among things, museum purposes, but would be limited to a maximum gross floor area of 5,000 square feet.
6. A range of other potential uses would be permitted as of right, or with certain limitations, or only after receiving approval from a Board of Appeals hearing examiner.

Please let me know if you have questions.

* * * * *

I. Historic Preservation

The Property is located within the SSHD. Montgomery County's Historic Preservation Ordinance, Chapter 24A of the Montgomery County Code (the "Ordinance"), defines "historic district" as a "group of historic resources which are significant as a cohesive unit and contribute to the historical, architectural, archeological or cultural values within the Maryland-Washington Regional District and which has been so designated in the master plan for historic preservation."

The SSHD was established in April 1988 when the County Council amended the county's Master Plan for Historic Preservation by designating as "historic" certain properties in the Sandy Spring/Ashton area. *See Appendix to this note.* The SSHD is an area along Meeting House Road and Rt. 108 that includes the Sandy Spring Bank building ((1895), both the old (1904) and new (1977) Mutual Insurance Company buildings, the Friend's Meetinghouse, and Meeting House Road itself from Rt. 108 to just beyond the Meeting House. Both the 1998 Sandy Spring/Ashton Master Plan and the 2015 Sandy Spring Rural Village Plan emphasize the importance of the SSHD.

Each of the buildings and properties within the SSHD is considered a historic resource subject to the Ordinance, which defines "historic resource" as a "district, site, building, structure or object, including its appurtenances and environmental setting, which is significant in national, state or local history, architecture, archeology or culture."

The Ordinance effectively requires an owner of a historic resource to maintain the exterior features of the historic resource. The Ordinance defines "exterior features" as the "architectural style, design and general arrangement of the exterior of a historic resource, including the color, nature and texture of building materials, and the type of style of all windows, doors, light fixtures, signs or other similar items found on or related to the exterior of a historic resource."

In addition, the Ordinance requires an owner of a historic resource to obtain a historic area work permit from the Historic Preservation Commission (the "Commission") before undertaking any work that changes the exterior of the historic resource. No permit is required, however, for the following: interior work; gardening and landscaping; ordinary exterior maintenance (e.g., painting non-masonry surfaces, roof repairs, gutters, trim, lights, etc.) with materials and design matching what is already in place; paving repairs with matching materials; or performing general maintenance as long as the work does not alter exterior features.

The Ordinance provides that failure to properly maintain the exterior features of a historic resource may be deemed "demolition by neglect" and may subject the owner to a civil fine for noncompliance. Nothing in the Ordinance dictates or limits what changes an owner may make to the interior of a historic resource (i.e., a building), provided that such changes do not alter or modify the exterior features of the resource.

The Ordinance defines “demolition by neglect” as the “failure to provide ordinary and necessary maintenance and repair to an historic site or an historic resource within an historic district, whether by negligence or willful neglect, purpose or design, by the owner or any party in possession of such a site, which results in any of the following conditions:

- (a) The deterioration of exterior features so as to create or permit a hazardous or unsafe condition to exist.
- (b) The deterioration of exterior walls, roofs, chimneys, windows, the lack of adequate waterproofing or deterioration of interior features or foundations which will or could result in permanent damage, injury or loss of or to the exterior features.”

The Commission, upon completion of a multi-step process, may issue a final notice of corrective action requiring the owner of a historic resource to undertake within 30 days repairs and maintenance to prevent demolition by neglect. Failure to timely comply with such a final notice is considered a Class A civil violation of the Ordinance punishable by a fine of \$500 for the first day, increasing to \$750 per day for each day of continuing non-compliance.

II. Zoning

Montgomery County’s Zoning Ordinance, Chapter 54 of the Montgomery County Code, governs land use and zoning throughout the county. For each of the County’s two dozen plus zones, the Zoning Ordinance specifies uses that are permitted by right, those that are permitted with certain limitations defined in the Zoning Ordinance, and those that are conditioned on pre-approval by a Board of Appeals hearing examiner. Each use is defined with specificity.

County Master Plans guide future land uses and recommend which zones should apply to specific properties, along with corresponding densities and building standards (which are not particularly relevant for already developed properties, particularly those subject to the Historic Preservation Ordinance). Once adopted by the County Council, these recommendations in Master Plans have the force of law.

Since at least the 1980s, the Property has been zoned to allow a mix of commercial and residential uses. The County Council’s adoption of the 2015 Sandy Spring Rural Village Plan updated the Property’s zone to the Commercial Residential Neighborhood (“CRN”) zone, which continues to permit a mix of uses, and specified maximum allowances of 0.75 for total Floor Area Ratio (“FAR”); 0.75 for non-residential FAR; 0.50 for residential FAR; and 45’ for building height. Note that the undeveloped parcels that front Rt. 108 adjacent to west boundary of the Property are also zoned CRN but have a different density and building standards specified.

The CRN zone permits a range of uses by right and with limitations. Potential uses of particular relevance to the Museum – whether as an actual user, lessor or seller of the Property – include: a “cultural institution” (e.g., museum) limited to a maximum gross floor area of 5,000 square feet; an artisan manufacturing and production facility; a charitable/philanthropic institution; a medical or dental clinic with up to 4 practitioners; professional or other business

offices; and retail/service establishments up to 5,000 square feet. (Other permitted uses include: a variety of housing types; residential care facilities; small day care facilities; religious assemblies.)

Here are definitions from the Zoning Ordinance for each of the above-mentioned particularly relevant uses:

- “Cultural Institution” means any privately owned or operated structure and land where works of art or other objects are kept and displayed, or where books, periodicals, and other reading material is offered for reading, viewing, listening, study, or reference, but not typically offered for sale. Cultural Institution includes a museum, cultural or art exhibit, and library.
- “Artisan Manufacturing and Production” means a structure used for the manufacture and production of commercial goods by a manual worker or craftsman, such as jewelry, metalwork, cabinetry, stained glass, textiles, ceramics, or hand-made food products. Artisan Manufacturing and Production does not include any activity that causes noise, odor, or vibration to be detectable on a neighboring property.
- “Charitable, Philanthropic Institution” means a private, tax-exempt organization whose primary function is to provide:
 - a. services, research, or educational activities in areas such as health and social services;
 - b. housing and support services for persons who are present as a result of treatment or care being provided to a member of their household by a federal treatment facility or a Hospital;
 - c. recreation; or
 - d. environmental conservation.

Charitable, Philanthropic Institution does not include a trade or business whose primary purpose or function is promoting the economic advancement of its members, such as a professional or trade association or a labor union. Charitable, Philanthropic Institution also does not include other uses specifically defined or regulated in this Chapter such as a: Religious Assembly, public or private educational institution, library or museum, Private Club, Service Organization, Residential Care Facility, or Independent Living Facility for Senior Adults or Persons with Disabilities (internal citations omitted).

- “Office” means a room, set of rooms, or a building where the business of a commercial or industrial organization or of a professional person is conducted. Office includes a chancery, but does not include medical or dental services.
- “Clinic (Up to 4 Medical Practitioners)” means a building occupied by up to 4 medical practitioners and related services to provide healthcare on an outpatient basis.

- “Retail/Service Establishment” means a business providing personal services or sale of goods to the public. Retail/Service Establishment does not include Animal Services or Drive-Thru (internal citations omitted).

APPENDIX

Following is the statement providing the basis for establishing the Sandy Spring Historic District that was included in the Montgomery County Council’s April 1988 amendment to the Montgomery County Master Plan for Historic Preservation:

28/11 Sandy Spring Historic District

Route 108 and Meetinghouse Rd.

Sandy Spring, settled in 1727 by the Quaker James Brooke, is one of the oldest settlements in the county with a fine collection of religious, financial, and educational buildings.

A number of improvement efforts which were to have national significance began in Sandy Spring, including the study of methods of farming, the formation of women's societies, the development of the first free black settlement in the county, the establishment of the Savings Institute of Sandy Spring, which is the first organization of its kind in the county, and the Montgomery Mutual Insurance Company, the oldest continual corporation in the county.

The Sandy Spring Historic District boundary is shown in Figure 2. The district includes the commercial area along the south side of Route 108 and west side of Meetinghouse Road, continuing south along both sides of Meetinghouse Road to include the Friend's Meetinghouse parcel and 50' to the east and south of this parcel on the east side of Meetinghouse Road. This boundary encompasses the parcels of the district’s resources and additional setting around the Friend’s Meetinghouse to preserve the integrity of the vista of this resource.

The inclusion of the Montgomery Mutual Insurance Company property on Parcel 442 within the boundaries of the district is not intended to preclude new development on the site or restrict the allowable density of development. Rather, the intention is to assure that the high standards of sensitive design which have been established by the 1977 Montgomery Mutual building be carried on in the construction of other new buildings on the site.

An important historic element of the Sandy Spring Historic District is Meetinghouse Road itself. The rural character of Meetinghouse Road establishes and defines the historic environment of the overall historic district. It provides the linkage of historic resources in an agricultural landscape. The inclusion of a portion of this road within the district is intended to preserve the rural character of the roadway including its width, design and landscaping.

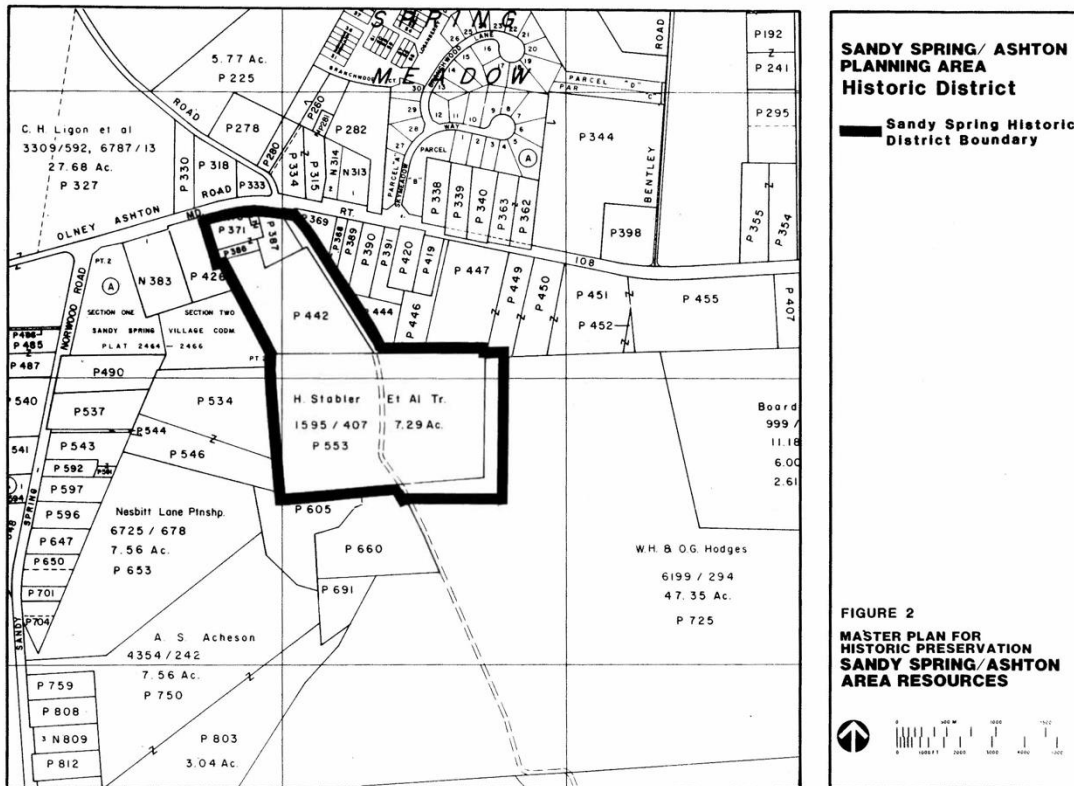


FIGURE 2
 MASTER PLAN FOR
 HISTORIC PRESERVATION
 SANDY SPRING/ASHTON
 AREA RESOURCES

March 14, 2025

Mr. Jerry Therrien
Sandy Spring Museum
17901 Bentley Road
Sandy Spring, MD 20860
Email to: Jerry20324@gmail.com

**SUBJECT: Executive Summary Report
908 Olney Sandy Spring Road
Sandy Spring, Maryland 20860
PR&A Project No. 257872**

Dear Mr. Therrien:

Pond, Robinson & Associates (PR&A) is pleased to submit this Executive Summary Report for the referenced project. These services were provided in accordance with PR&A Proposal No. P25-7872 which was authorized by Ms. Allison Weiss on February 28, 2025. Our services included the review of available and supplied documents relating to the property, interviews of individuals knowledgeable of the property, a visual survey of the facility, and preparation of this report.

PR&A's field services were performed on March 5, 2025, by Mr. Rick Hozman. This report has been reviewed by Mr. Mark P. Petersen, P.E. These individuals are knowledgeable professionals, who possess considerable experience in completing physical condition surveys of office and retail properties.

Individuals interviewed who provided information used in preparing this report included Mr. John Gilfrich, Facilities Manager, and Ms. Janie Bjork, Director of Corporate Real Estate and Facilities, both with Sandy Spring Bank. Both Mr. Gilfrich and Ms. Bjork have been associated with the property for several years and were knowledgeable and helpful during our site visit.

GENERAL DESCRIPTION

General Information

The Sandy Spring Bank is a single-story structure with a basement, originally built circa 1895 with later additions and alterations. The property is located at 908 Olney Sandy Spring Road in Sandy Spring, Montgomery County Maryland. The property consists of two parcels of land containing approximately 27,666 square feet or 0.635 acres.

The property is located approximately 16 miles north of Washington D.C. and 23 miles southwest of Baltimore, Maryland. The site possesses good access to the adjacent Olney Sandy Springs Road.

The original portion of the building includes a shallow stone masonry foundation. The concrete vault addition includes reinforced-concrete shallow footings with concrete foundation walls. The original building consists of exterior load-bearing brick masonry walls with a wood-framed floor and roof structure. Interior reinforced-concrete vaulted areas are provided. The rear addition consists of a reinforced-concrete vault with exterior brick masonry veneer to match the original building. The exterior façade consists of red clay brick in a running bond pattern with stone window sills. Subsequent renovations added cast stone headers and other stone accent elements. A later renovation added a portico with four wood columns at the front (main) entrance. The building includes a variety of wood-framed windows including square, rectangular, arched, oval, and clerestory windows. Some of the windows were operable while others were fixed or sealed in place.

The original building, as well as the east and west wings, include gabled roofs with a slate tile roof system over a 2x wood roof deck. The roof areas are sloped with pitches between 8:12 and 12:12. The vault addition includes a low-sloped roof with a Thermoplastic Polyolefin (TPO) single-play roof membrane system. All roof areas drain to perimeter copper gutters and downspouts.

The building is equipped with split systems for conditioned air utilizing refrigerant R-22, with varying in manufacture dates from approximately 2001 to 2011. The systems include attic-mounted horizontal fan coil units and exterior pad-mounted condensing units manufactured by Carrier and Goodman. The vaulted addition includes a mini split AC system manufactured in 1995. Heating for the building is provided with a hot water radiant system supplied by a gas-fired low-pressure packaged boiler. Domestic hot water is provided by an electric water heater. The building is not equipped with a fire sprinkler system or fire alarm system.

The building was originally built and used as a banking institution branch through 2016. Reportedly, the building has been vacant since 2016. Currently, the building is not occupied. However, at the time of our inspection, two Sandy Spring Bank employees were performing cleanup and document archiving.

The site improvements primarily include asphalt-paved drives and open surface automobile parking. Vehicular entrances are provided from curb cuts into Olney Sandy Spring Road and Thomas Village Lane. Open surface parking is provided for 20 automobiles including one accessible space located closest to the main entrance. Sidewalks consist of brick pavers systems at the front elevation and a concrete sidewalk at the rear elevation. The site is moderately sloped to the southeast. Stormwater drains via sheet flow across the pavement surface and landscaped areas and discharges to the adjacent property to the south. No below grade storm water systems are provided on the site. The storm water appears to eventually discharge to the adjacent public right-of-way and the municipal storm sewer system.

Based on observations made during our site visit on March 5, 2025, and our review of the provided documentation, the property was generally observed to be in fair condition. We observed no critical issues pertaining to the foundations, structural framing, exterior walls, windows, doors, or interiors. We observed deficiencies related to the site pavements and sidewalks, exterior masonry, roof systems, MEP systems, and accessibility. We offer our comments and concerns below.

Site/Civil Improvements

A concrete drainage swale is installed along the south edge of the site pavement. The swale was mostly covered with vegetation and soil.

Asphalt pavement is provided at the automobile entrance drives and parking areas. The pavement is in poor condition and displayed extensive cracking, raveling, and isolated areas of full-depth failure. The pavement markings throughout the site were generally in poor condition with mostly faded paint at the vehicular parking spaces and accessible access aisle. Concrete wheel stops were observed to be displaced and damaged. Initial pavement repairs and routine maintenance including repairs, sealcoating, and restriping can be expected over the term.

Concrete pedestrian sidewalks were in fair condition and displayed exposed aggregate and isolated cracking. Brick paver sidewalks were in fair condition with sections of loose and displaced brick pavers, settlement and cracking. Concrete steps are provided at the main entrance and rear basement entrance. The concrete stairs were generally in fair condition with isolated cracks and spalls. Landscaping is provided along the north and west elevations. The landscaping appeared to be mature and in good condition. A landscape irrigation system is not provided.

The exterior lighting at the property consists of a combination of building- and pole-mounted fixtures. The fixtures are HID and LED type and were reportedly in good condition.

Suggested Action Items:

- Clean out and repair any damaged sections of the concrete drainage swale during routine maintenance.
- Perform a complete mill and overlay of the asphalt pavement and restripe.
- Sealcoat and restripe the asphalt pavement areas on a 5-year cycle. Crack sealing is included and should be performed prior to sealcoat.
- Replace and secure concrete wheel stops.
- Repair concrete and brick paver sidewalks throughout the site to mitigate potential trip hazards.
- Repair concrete stairs, as necessary.
- Perform routine maintenance of building-mounted light fixtures throughout the site.

Structural

According to Figure 16-2 - Seismic Zone Map of the United States, contained in the 1997 Edition of the Uniform Building Code (UBC), this property is located in Seismic Zone 1. Seismic zones are numbered from 0 to 4 with Zone 4 having the greatest risk of seismic activity and Zone 0 having the least risk. The property is located in a low seismic hazard zone and therefore, a probable maximum loss (PML) study was not performed as part of the Scope of Services for this project.

No obvious building foundation movement or settlement was reported or observed during the site evaluation. The structural systems appear to be free from damage, deterioration, or overloading. Building finishes give no indication of building movement or significant structural distress. We noted isolated concrete cracking and spalling at the concrete foundation wall along the east building elevation. This condition appears to have been caused by vehicular impact.

Suggested Action Items:

- Perform isolated concrete spall and crack repairs of the concrete foundation wall at the east elevation. Relocate vehicle wheel stops at a further distance from the building.

Building Exteriors

The exterior walls of the buildings consist of solid red brick masonry walls with stone and cast-stone accents. The building main entrance is accented by exterior painted wood columns and decorative wood moldings. Wood-framed fixed and single-hung windows with single-pane glazing are provided within brick masonry punched openings. Painted wood doors with single-pane glazing are provided at the main entrance. A hollow metal door in a metal frame is provided at the rear elevation for basement egress.

The condition of the exterior cladding elements was observed to be fair. The exterior brick masonry walls exhibited isolated areas of deteriorated mortar joints, cracked mortar joints around cast stone elements, cracked masonry, missing bricks, and staining. We observed severely cracked and damaged cast stone window sills, and isolated cracks in window head keystones. The wood windows were in good condition, having reportedly been refurbished and repainted in July 2024. The exterior doors were in good condition with only routine maintenance required.

Suggested Action Items:

- Perform a complete exterior cleaning of the brick and stone masonry.
- Perform tuckpointing and isolated brick repairs.
- Perform repairs and replacements of the cracked/damaged cast stone masonry elements.
- Repair and repaint the exterior doors and windows during routine maintenance.

Roof Systems

The building main roof consists of gabled roof sections with flat slate tiles and a center portion with low-sloped standing seam copper panels on a 2x wood deck. The addition includes a single-ply TPO roof membrane over rigid insulation on a concrete roof deck. PR&A did not access the roof areas. Limited observations were performed from the ground. PR&A is relying on the provided roof reports prepared by Iron Shore Contracting for inspection and repairs dated May 18, 2021, January 16, 2025, and February 10, 2025. The roof systems appear to be in fair condition and previously identified roof leaks have reportedly been repaired. We observed loose copper flashings, deteriorated mastic / sealants at the metal flashings, cracked slate tiles, microbial growth and one obstructed downspout. We understand from the provided reports that the TPO roof system has approximately 9 to 10 years of useful life remaining and the slate and copper roof systems have approximately 14 to 24 years of useful life remaining.

Suggested Action Items:

- Initiate an annual roof inspection and maintenance program.
- Perform all roof repairs identified during the annual inspections.
- Re-install, secure and seal the loose metal flashing below the west dormer window.
- Secure all loose gutters.
- Replace all cracked slate tiles.

- Replace all failed sealants at slate ridge lines and at metal flashings.

Interior Improvements

The floors are covered primarily with carpeting and vinyl composition tile (VCT). The interior walls consist primarily of gypsum wallboard with a painted finish, wood paneling, plaster, and exposed concrete. The ceilings consist primarily of suspended acoustical ceilings concealing the original plaster ceilings, exposed concrete ceilings and glue-on acoustical tiles over the structural concrete deck.

There are single-occupant common area restrooms on the ground floor and basement level. The common area restrooms feature 9”x 9” VCT flooring (a suspected asbestos containing material) with painted wood base, original plaster walls and ceilings.

The interior improvements were dated and in fair to poor condition. We noted stained and damaged ceiling tiles, blistered plaster walls and paint, and worn and stained carpet.

Suggested Action Items:

- Interior renovations will vary depending on the building’s future intended use.

HVAC Systems

Conditioned air is provided primarily by four split system AC units. Two systems include attic mounted horizontal fan coil units (FCUs) with exterior pad-mounted condensing units and one system includes a horizontal FCU located in the crawl space. These units are rated with cooling capacities of 3 to 5 tons, manufactured by Carrier and Goodman. One 1.5-ton mini split-system with an outdoor condensing unit manufactured by Carrier provides conditioned air to the concrete vault addition.

The HVAC equipment observed was manufactured between approximately 2001 and 2011. The systems utilize R-22 refrigerant for cooling. The AC systems were in poor condition and were not working at the time of our inspection. Based on the provided HVAC report by Bay Area Mechanical Services dated May 31, 2023, the systems require full replacement.

Heating is provided by a radiator system comprised of a combination of cast iron radiators and baseboard heaters supplied by a gas-fired low-pressure packaged boiler manufactured by Weil McClain. The system includes three electric 1/12-horsepower recirculating pumps. The boiler was last serviced in October 2024 and is reportedly in good condition. The heating system was operating during our inspection and appeared to provide adequate heating for the interior spaces.

Suggested Action Items:

- Replace two 5-ton AC systems including FCUs and exterior condensing units.
- Replace one 1.5-ton mini split system.
- Replace all analog thermostats with digital thermostats.
- Continue to perform annual maintenance of the packaged boiler.

Plumbing Systems

We observed that the water supply lines inside the buildings are primarily copper. Where visible, the waste lines were noted to be PVC, but we suspect that cast iron is present in concealed spaces. Domestic hot water is provided by a 20-gallon electric water heater located at the kitchen area in the basement. We anticipate new water heaters will be provided with future bathroom renovations. The basement mechanical room includes an electric sump pump. The pump discharge pipe exits the basement through a window well and was observed to be buried in the landscaping along the east elevation.

Suggested Action Items:

- Based on the age of the building we recommend performing a video inspection of the main sewer line to verify the slope and the integrity of the sewer line.
- Ensure the operation of the basement sump pump. Repair and/or replace the pump, as necessary.
- Investigate the sump pump discharge pipe outside the building and ensure that the discharge is unobstructed.

Electrical Systems

Primary electrical service is fed underground to an exterior wall-mounted meter box and trough located on the east building elevation. The electric service enters the building at the basement level and supplies two 200-ampere load centers at 208/120-volt, three-phase, four-wire alternating current (AC). Emergency power is not provided at this facility. The electrical panels were manufactured by Square D in 1971. Electrical panels generally have an expected useful life of 40 years before replacement parts and components become obsolete and difficult to obtain.

Suggested Action Items:

- We recommend an inspection of the two load centers and breakers.
- We anticipate the replacement of the two electrical load centers and all circuit breakers.
- We anticipate the upgrade of all interior outlets and light fixtures with future interior building renovation.

Fire Protection and Life Safety Systems

The building is not protected by a fire sprinkler system or a fire alarm system.

Vertical Transportation Systems

No elevators are installed at the property.

Accessibility

The site and building were originally developed and occupied prior to the enactment of the Americans with Disabilities Act (ADA) and therefore are not required to comply with ADA guidelines. However, the ADA requires that all new construction started after the promulgation of the Act must fully comply with the provisions of the Act. Major renovations or change in use of the facilities may require the partial or full compliance 2010 ADA Standards for Accessible Design.

Using the 2010 ADA Standards for Accessible Design, Pond, Robinson & Associates conducted a field screening of the subject building and surrounding grounds. We did not review any State or local accessibility codes that may be in effect. Based on our observations, the property and improvements are considered to be not accessible. The site and building ADA provisions can be summarized as follows:

According to our field count, there are a total of 20 parking spaces at the property. We observed a total of one standard accessible parking space and according to accessibility guidelines, one accessible parking space is required. The accessible parking space provided at the property appeared to be generally conforming to ADA guidelines. However, the ADA guidelines require that for every six or fraction of six accessible spaces, one space should be designated as van accessible, and the existing space is not dimensioned for van accessibility.

An accessible route is not provided to the main building entrance. The entrance has a step that would require modification for ADA compliance. The entrance doors and vestibule have clear space and door widths that are not ADA compliant.

The common area restrooms are not in compliance with accessibility guidelines. The restrooms do not include any accessible features and do not have the dimensions to make any modifications. At least one restroom would require a full renovation to bring into compliance with accessibility guidelines.

Suggested Action Items:

- Retain an accessibility consultant to perform an accessibility assessment of the facilities and make recommendations for compliance based on the proposed future use and renovation of the facility.

CLOSING

This report has been prepared on behalf of and exclusively for the use of Sandy Spring Museum and their successors and assigns. This report and the findings contained herein shall not, in whole or in part, be disseminated or conveyed to any other party or be used or relied upon by any other party, in whole or in part, without our prior written consent.

We appreciate the opportunity to work with you on this project and trust the contents of this report are satisfactory. We would be pleased to discuss our findings and conclusions with you. If you have any questions, please do not hesitate to contact us.

Respectfully submitted,

Pond, Robinson & Associates



Rick Hozman, EIT, LEED AP
Associate



Mark P. Petersen, P.E. (IL, TX)
Principal

Attachments: Photograph Log



Photograph 1: Sandy Spring Bank general view of building.



Photograph 2: Entrance drive and curb cut into Olney Sandy Springs Road.



Photograph 3: General view of west parking area.



Photograph 4: South parking area. Note the displaced wheel stops.



Photograph 5: Accessible parking space and access aisle.



Photograph 6: Parking spaces adjacent to the building.



Photograph 7: Deteriorated asphalt pavement.



Photograph 8: Displaced wheel stops. Note the buried concrete swale.



Photograph 9: Typical condition of asphalt pavement.



Photograph 10: Cracked concrete sidewalk.



Photograph 11: Typical paver sidewalk along the public right of way.



Photograph 12: Paver sidewalk along the north elevation.



Photograph 13: Cracked paver sidewalk.



Photograph 14: Displaced pavers at the front entrance.



Photograph 15: Deteriorated concrete steps at the main entrance.



Photograph 16: Concrete stairs at the rear elevation for the basement egress.



Photograph 17: Typical landscaping at the east elevation.



Photograph 18: Landscape and hardscape at the front elevation.



Photograph 19: General view of the building north (front) elevation.



Photograph 20: General view of the west elevation.



Photograph 21: General view of the south elevation.



Photograph 22: General view of the east elevation.



Photograph 23: Typical single-hung wood window.



Photograph 24: Typical single-hung arched window.



Photograph 25: Example of deteriorated masonry mortar joints.



Photograph 26: Example of deteriorated masonry mortar joints.



Photograph 27: HVAC line penetrations and missing brick.



Photograph 28: Example of stained brick masonry.



Photograph 29: Cracked cast stone above windows.



Photograph 30: Cracked cast stone above windows.



Photograph 31: Cracked stone window sill.



Photograph 32: Cracked stone window sill.



Photograph 33: Slate roof with microbial growth. Note the prior sealant repairs.



Photograph 34: Slate roof and dormer with displaced metal flashing. Note the loose and sagging gutter.



Photograph 35: Partial view of low TPO roof.



Photograph 36: Partial view of low TPO roof.



Photograph 37: Downspout in contact with the concrete sidewalk obstructing water flow.



Photograph 38: Cracked foundation wall.



Photograph 39: Building main entrance.



Photograph 40: Main entrance vestibule.



Photograph 41: Bank teller stations.



Photograph 42: Back view of bank teller stations.



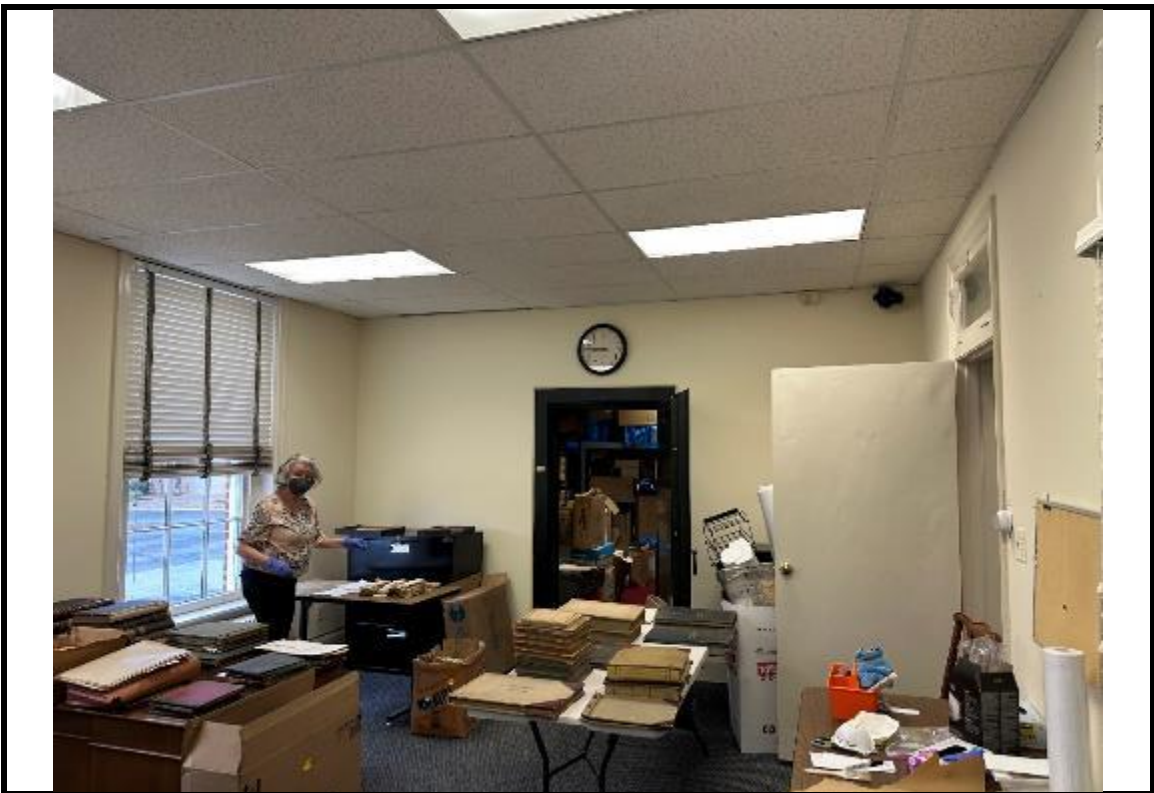
Photograph 43: Manager's office.



Photograph 44: Main safe door.



Photograph 45: Decorative suspended ceiling tiles with water stains.



Photograph 46: Concrete vaulted addition.



Photograph 47: Vaulted area safe door.



Photograph 48: Typical restroom.



Photograph 49: Water damage on the interior plaster wall.



Photograph 50: Blistered plaster wall and paint.



Photograph 51: Basement stairs.



Photograph 52: Basement area.



Photograph 53: Typical floor joist and 2x wood decking.



Photograph 54: Typical roof framing and 2x roof decking.



Photograph 55: Typical horizontal fan coil unit in attic space.



Photograph 56: Typical exterior AC condensing units.



Photograph 57: Gas-fired packaged boiler.



Photograph 58: Hot water recirculating pumps.



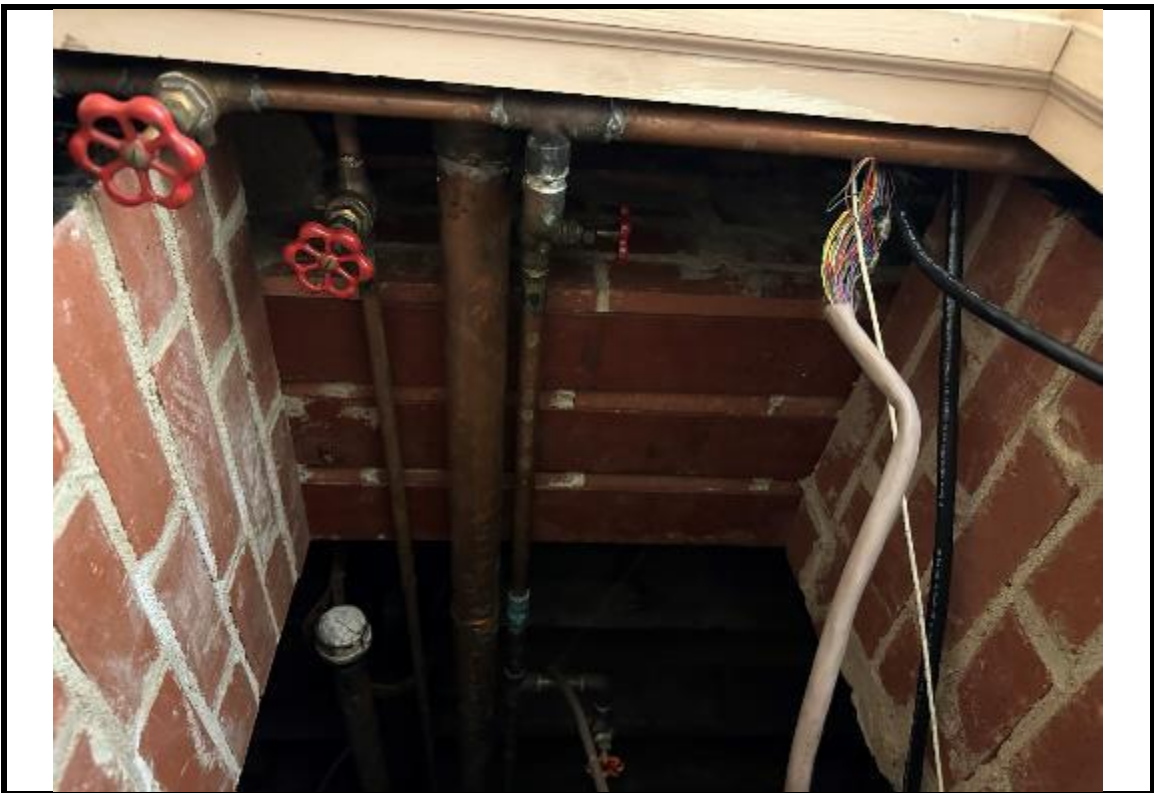
Photograph 59: Typical cast iron radiator.



Photograph 60: Typical baseboard radiator.



Photograph 61: Typical analog thermostat.



Photograph 62: Domestic water piping.



Photograph 63: Electric water heater.



Photograph 64: Basement sump pump.



Photograph 65: Electric service meter.



Photograph 66: Electric load centers.

Cushman & Wakefield APPRAISAL Summary

August 21, 2025

Prepared for Atlantic Union Bank

Historic Sandy Spring Branch

908 Olney Sandy Spring Road

Sandy Spring, Montgomery County, MD 20860

Built: 1901, age 124 years, effective age: 30 yrs; remaining economic life: 20 yrs

Located within the Historic Sandy Spring District

Gross Building Area: 5,811 SF

4,693 square feet of net rentable area situated on a 21,706-square-foot site 0.50 acres

Additional approximately 1,118 square feet of substantially finished basement area, below grade;

Consider basement use: as storage or supplemental finished space complementing the above-grade use.

30 on-site surface parking spaces - parking ratio of 6.39 per 1,000 square feet of net rentable area

Deed Restriction:

(i) the Property shall not be used by the Grantee or any prospective purchaser, tenant, or user of the Property as a commercial bank, savings bank, savings and loan association, trust company, credit union, mortgage loan production office, automated teller machines or such other use offering the same or similar financial services (collectively, "Financial Institution") and (ii) there shall be no signage, advertising or publication on the Property or otherwise by the Grantee or any prospective purchaser, tenant or user of the Property that relates to the present or future use of the Property as a Financial Institution."

Valued the subject property as a general commercial property: to be converted into various retail uses (restaurant, medical office, small professional services center, among others).

Fair Market Value (FMV): Fee Simple, as of July 25, 2025, \$2,360,000, as Is.

Taxable Assessment - \$2,903,000; current tax liability: \$34,684 (\$7.39/sf)

Effectively, although the subject property is located within a historic district, the constraints of this district appear to be limitations on major exterior renovations or alterations to existing structures, based on our conversations with Montgomery County staff as noted. As a result, we do not believe the subject's existence within this historic district to result in a significant detraction to its overall utility.

Local Area Analysis Conclusion

The subject property is situated within the heart of Sandy Spring, a historically rich and community-oriented area in northeastern Montgomery County. The immediate surroundings are characterized by a blend of civic, institutional, and low-density residential uses, reflecting the area's longstanding village-scale development pattern. As part of the Sandy Spring Historic District, the local area maintains a distinct identity rooted in its Quaker heritage, cultural institutions, and preserved architectural character. The presence of community landmarks such as the Sandy Spring Museum, nearby churches, and historic buildings contributes to the area's cultural significance and reinforces its role as a center of heritage, education, and civic engagement within the broader county context.

Study Area Conclusion

We analyzed the retail trade history and profile of the subject's region and primary trade area in order to make reasonable assumptions regarding the continued performance of the property. A metropolitan and locational overview was presented which highlighted important points about the study area.

Demographic and economic data specific to the trade area were also presented. Marketing information relating to these sectors was presented and analyzed in order to determine patterns of change and growth as it impacts Historic Sandy Spring Branch. The data quantifies the dimensions of the total trade area, while our comments provide qualitative insight into this market. A compilation of this data forms the basis for our projections and forecasts for the subject property. The following are our key conclusions.

- The subject property most directly competes with the other retail centers and freestanding retail buildings located along Olney Sandy Spring Road and throughout the Suburban Maryland region, based on future use.
- These properties are generally well maintained and have high occupancy rates. The subject has an advantage among its competitive set due to its excellent visibility within Sandy Spring, and unique buildout as a former historic bank branch location.
- As such we believe the property will serve a market encompassing a radius of 5-miles. Over the next five years, both the population and number of households in the subject's trade area are projected to remain fairly

stable. Household income levels in the area are higher than the state or CBSA, both significantly above national levels.

- The subject has very good accessibility via the regional Interstate network and local arterials that provide linkages throughout the Washington, D.C. MSA.
- **Based on our analysis we concluded that the subject is well positioned within its market area and the prospect for net appreciation in real estate values is expected to be good.**

Zoning

General Information

The property is zoned CRN-0.75 C-0.75 R-0.5 H-45 by Montgomery County. A summary of the subject's zoning is provided in the following table:

ZONING	
Municipality Governing Zoning:	Montgomery County
Current Zoning:	CRN-0.75 C-0.75 R-0.5 H-45
Current Use:	Bank Branch
Is Current Use Permitted?	Yes
Permitted Uses:	Permitted uses within this district include a mix of commercial and residential uses under the standard method of development, including retail, office, and residential uses that are compatible with neighborhood settings
Prohibited Uses:	Prohibited uses within this district include intense uses that could negatively impact nearby residential areas such as heavy industrial or large-scale entertainment venues

ZONING REQUIREMENTS	CODE
Minimum Lot Area:	Varies based on use and building type
Maximum Building Height:	45 feet
Maximum Floor Area Ratio (FAR):	
Commercial:	0.75 times lot area
Residential:	0.5 times lot area
Maximum Lot Coverage (% of lot area):	Typically up to 80–90%, depending on building type and site layout
Minimum Yard Setbacks	
Front (Feet):	20 feet from public streets
Rear (Feet):	20 feet when abutting residential zones
Side (Feet):	6 feet when abutting residential zones; 4 feet otherwise
Required On-Site Parking:	
Spaces per 1,000 Square Feet:	5.0 per 1,000

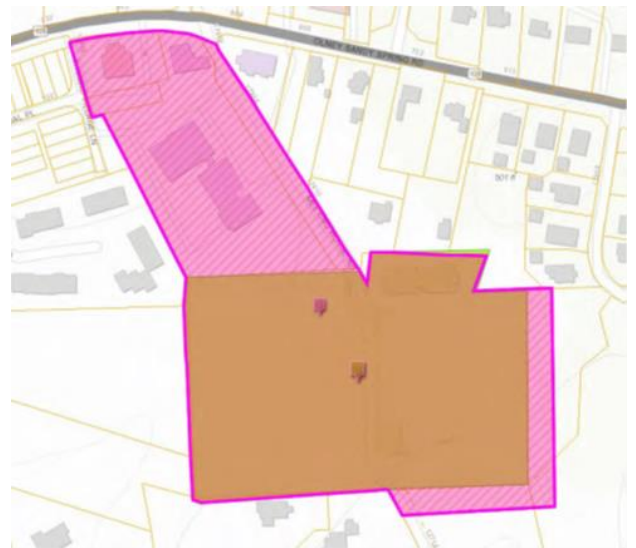
Compiled by Cushman & Wakefield of Washington, D.C., Inc.

Zoning Conclusions

We are not experts in the interpretation of complex zoning ordinances but based on our review of public information, the subject property appears to be a conforming use.

Detailed zoning studies are typically performed by a zoning or land use expert, including attorneys, land use planners, or architects. The depth of our study correlates directly with the scope of this assignment, and it considers all pertinent issues that have been discovered through our due diligence. We note that this appraisal is not intended to be a detailed determination of compliance, as that determination is beyond the scope of this real estate appraisal assignment.

During the preparation of this appraisal report, we spoke with Amy Zou (240-777-6245), a zoning plan reviewer with Montgomery County, MD, who confirmed the subject's zoning and noted that a wide variety of uses were permitted within this zoning area. We also spoke with Russell Corbin (301-495-4577), a planner with Montgomery County, who noted that the subject is located within the Sandy Spring Historic District, a historic overlay, displayed on the map on the following page:



The Sandy Spring Historic District was formed as a historic district overlay due to its collection of structures dating from the late eighteenth to the early twentieth centuries, as well as its locational significance as one of the oldest settlements in Montgomery County. According to Mr. Russell Corbin, due to the subject's position within this overlay, any "significant" exterior work would require plan review and ultimate approval by the Montgomery County historic preservation commission. However, Mr. Russell noted that interior renovations are not included in this stipulation and may occur without needing approval from the historic preservation commission. Additionally,

ordinary exterior maintenance (including paint repair/retouching, gutter, roof repair, and “repairs that match what is already there” among other repairs) is also not subject to plan review and approval by the historic preservation commission and may occur freely at any time.

Effectively, although the subject property is located within a historic district, the constraints of this district appear to be limitations on major exterior renovations or alterations to the facades of existing structures, based on our conversations with Montgomery County staff as noted. As a result, we do not believe the subject’s existence within this historic district to result in a significant to its overall utility except to prevent demolition of the existing structure.

Highest and Best Use

Conclusion

It is our opinion that the existing improvements add value to the site as though vacant, dictating a continuation of its current use. It is our opinion that the Highest and Best Use of the subject property as improved is a commercial building as it is currently improved.

Most Likely Buyer

The subject’s size, type, and configuration make it ideally suited for owner occupancy. Although some other projects within the market are leased, most facilities similar to the subject are owner-occupied. An examination of recent sales activity in the area indicates that there is demand for such properties by owner-users within the market.

As shown within our selected Comparables within the Sales Comparison Approach, vacant bank branch locations in the market are typically acquired by owner-users with the intent to occupy and operate from their respective locations. Additionally, according to two brokers we spoke with regarding recent sales of vacant bank branches (Collin Mercier, 443-684-9285, and George Shenias, 443-223-1308), their properties were originally marketed for sale or lease, but had more interest from owner-users who intended to purchase their properties as opposed to prospective tenants interested in leasing the facilities. As a result, we conclude that the most likely purchaser of the subject is an owner-user, who would typically rely on the Sales Comparison Approach to value the property.

Physical Building Assumptions (extracted list):

- The Report assumes (a) responsible ownership and competent management of the Property; (b) there are no hidden or unapparent conditions of the Property, subsoil or structures that render the Property more or less valuable (no responsibility is assumed for such conditions or for arranging for engineering studies that may be required to discover them); (c) full compliance with all applicable federal, state and local zoning and environmental regulations and laws, unless noncompliance is stated, defined and considered in the Report; and (d) all required licenses, certificates of occupancy and other governmental consents have been or can be obtained and renewed for any use on which the value opinion contained in the Report is based.
- The physical condition of the improvements considered by the Report is based on visual inspection by the Appraiser or other person identified in the Report. Cushman & Wakefield assumes no responsibility for the soundness of structural components or for the condition of mechanical equipment, plumbing or electrical components.
- Unless otherwise stated in the Report, the existence of potentially hazardous or toxic materials that may have been used in the construction or maintenance of the improvements or may be located at or about the Property was not considered in arriving at the opinion of value. These materials (such as formaldehyde foam insulation, asbestos insulation and other potentially hazardous materials) may adversely affect the value of the Property. The Appraisers are not qualified to detect such substances. Cushman & Wakefield recommends that an environmental expert be employed to determine the impact of these matters on the opinion of value.
- Unless otherwise stated in the Report, compliance with the requirements of the Americans with Disabilities Act of 1990 (ADA) has not been considered in arriving at the opinion of value. Failure to comply with the requirements of the ADA may adversely affect the value of the Property. Cushman & Wakefield recommends that an expert in this field be employed to determine the compliance of the Property with the requirements of the ADA and the impact of these matters on the opinion of value.
- Unless otherwise noted, we were not given a soil report to review. However, we assume that the soil’s load-bearing capacity is sufficient to support existing and/or proposed structure(s). We did not observe any evidence to the contrary during our physical inspection of the property. Drainage appears to be adequate.
- Unless otherwise noted, we were not given a title report to review. We do not know of any easements, encroachments, or restrictions that would adversely affect the site’s use. However, we recommend a title search to determine whether any adverse conditions exist.
- Unless otherwise noted, we were not given a wetlands survey to review. If subsequent engineering data reveal the presence of regulated wetlands, it could materially affect property value. We recommend a wetlands survey by a professional engineer with expertise in this field.
- Unless otherwise noted, we observed no evidence of toxic or hazardous substances during our inspection of the site. However, we are not trained to perform technical environmental inspections and recommend the hiring of a professional engineer with expertise in this field.
- Unless otherwise noted, we did not inspect the roof nor did we make a detailed inspection of the mechanical systems. The appraisers are not qualified to render an opinion regarding the adequacy or condition of these components. The client is urged to retain an expert in this field if detailed information is needed.

SANDY SPRING



Sandy Spring Museum

Strategic Plan (2023-2028)

Executive Summary and Discussion of Key Strategies

Approved January 2023

Table of Contents

I. Methodology and Scope of Work 3

II. Planning Framework 4

III. Mission, Vision, Values, and Environmental and Internal Analyses 5

 A. Mission, Vision, and Values 5

 B. Environmental and Internal Analysis 6

IV. Strategic Direction, Objectives, and Key Strategies 14

 A. Strategic Direction 15

 B. Objectives 17

 C. Key Strategies 17

V. Implementation Plan 25

VI. Financial Plan 26

VII. Additional Sources 26

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:

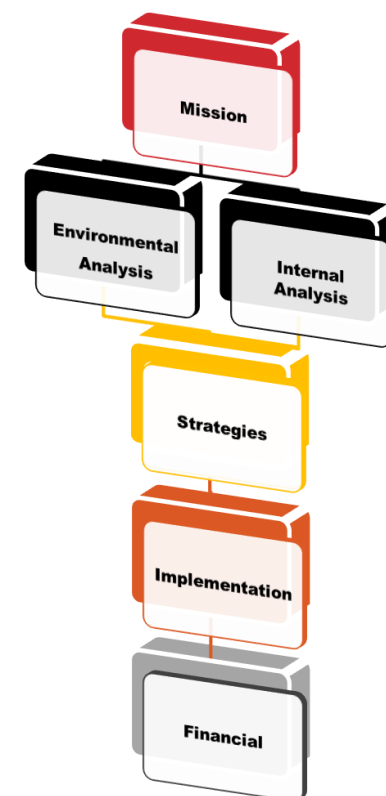
- As a management tool for staff and board, to organize action through prioritized objectives that mitigate challenges and leverage strengths;
- As a fundraising and marketing tool, to convey SSM's direction to external stakeholders;
- To measure the success of its principal objectives;
- To reassess, 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

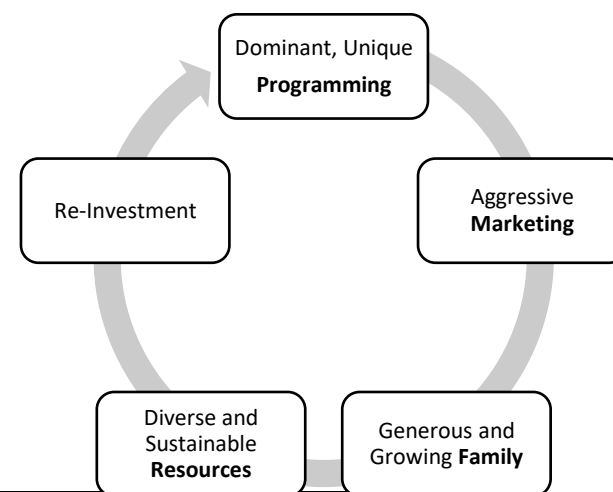
In preparation for strategy development, an environmental analysis was conducted to determine what would be required for SSM to provide superior and sustainable services in each area of its mission. This environmental analysis considered the programming, marketing, and internal practices of peer organizations, 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.
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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.

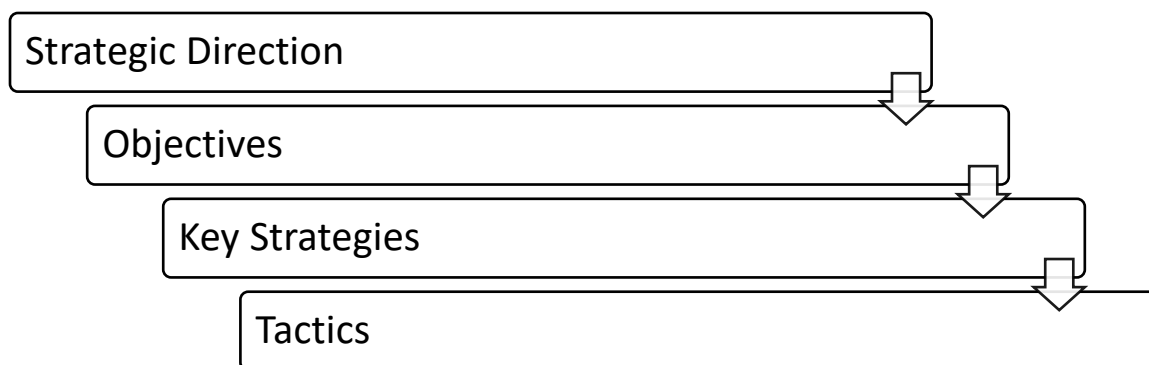
IV. Strategic Direction, Objectives, and Key Strategies

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

Program	Maintain	Expand / Enhance	Reduce	Cease	Introduce
Collections	<ul style="list-style-type: none"> ▪ Digital Archives 	<ul style="list-style-type: none"> ▪ Use of collections in programs and events ▪ Equity in Metadata 			<ul style="list-style-type: none"> ▪ Activate underrepresented stories through reparative and inclusive practices ▪ A collections plan ▪ Deaccession, as dictated by the collections plan
Events & Programs	<ul style="list-style-type: none"> ▪ Summer Beer & Wine Gardens ▪ Bluegrass Jam ▪ Strawberry Festival 	<ul style="list-style-type: none"> ▪ Diversity of communities represented in programs ▪ Experiential programs, e.g. Food & Drink 	<ul style="list-style-type: none"> ▪ Reduce monthly HHH and replace with new showstopper programs 	<ul style="list-style-type: none"> ▪ Introducing last-minute programs 	<ul style="list-style-type: none"> ▪ Big picture, long-term programs on the following themes: <ul style="list-style-type: none"> ▪ Social cohesion (programming for cross-cultural engagement) ▪ Equity in Metadata ▪ Immigration ▪ Institutional partnerships including Smithsonian Folklife Festival ▪ MoCoLore

Program	Maintain	Expand / Enhance	Reduce	Cease	Introduce
Exhibits		<ul style="list-style-type: none"> Interactive, large-scale installations 	<ul style="list-style-type: none"> Reduce from 4/Year to 3/Year 	<ul style="list-style-type: none"> Exhibitions that are strictly art Vignette exhibitions 	<ul style="list-style-type: none"> "Basement Empire" Concepts that cross cultures and time (like corn) Simple exhibits created in partnership with writers (writers reacting to artifacts on exhibit)
Artists		<ul style="list-style-type: none"> Traditional artists in gift shop Traditional organization-in-residence program Support of traditional artists 		<ul style="list-style-type: none"> Studio artists who don't interact with public 	<ul style="list-style-type: none"> Folklife gift registry & performers list for private events Traditional artist-in-residence program

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:

- 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:

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

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.

FAMILY

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

	2028
Board Meetings	4/year + 1 immersion (optional)
Committees	1 committee
Engagement	1 project/year
Give / Get	\$3,000
Family	Support the recruitment of 2 new family members each year
Baseline Time Commitment	22 hours (meetings); 10 hours (project); 4 hours (events): 36 Hours/year
Term Limits	Initial Three-Year Term; Annual Review by Charter; Renewable

REVENUES

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.

CAPITAL & CAPACITY

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.