



Strategic Plan

2023-2028

Who is Kaleideum?

Mission

Inspiring wonder, curiosity, and lifelong learning in our children and community through interactive play and discovery.

Vision

We envision a creative, innovative learning ecosystem that equips and empowers us all to make a difference in our ever-changing world.

Values

- Resilience: *The ability to recover from change and difficulty*
- Insightfulness: *Cultivation of a deep understanding*
- Innovation: *The fostering of creativity, problem solving, and new ways of thinking and doing*
- Accountability: *Dedication to and responsibility for the mission, the work, and the community*
- Relationship-Driven: *The prioritization and pursuit of meaningful relationships with our visitors, our colleagues, and our partners in the community*

DEAI Statement

- Kaleideum is committed to creating and sustaining a diverse, equitable, accessible, and inclusive learning ecosystem. *We provide innovative opportunities that welcome everyone to dream, create, and learn together.*
- Kaleideum fosters a culture of belonging where all people feel encouraged to contribute and participate. *We strive to attract staff, board, donors, volunteers and visitors that accurately reflect the diverse composition of Forsyth County's residents.*
- Kaleideum believes there is value in listening to someone else's story — and courage in telling your own. *We foster an affirming and generous environment that inspires us all to consider different perspectives and be open to changing our minds.*
- Kaleideum believes that every person deserves the opportunity to reach their highest potential. *We honor the complexity of all people and their unique requirements for learning and growth.*
- Kaleideum rejects the practices and systems that perpetuate bias. *We acknowledge that museums are not neutral and accept our responsibility to increase equity in education, science, art, and innovation.*



Executive Summary

The Strategic Planning Process

Kaleideum employed a novel tool, Strategic Foresight, in its strategic planning process. To initiate this endeavor, R&L Consultants facilitated a two-day staff retreat to establish a Theory of Change and outline the museum's desired community outcomes over time. The Strategic Foresight model, developed by the Center for the Future of Museums, prompted Kaleideum to address future issues and concerns indicated by research, thus ensuring the strategic plan encompasses and prepares for them.

To facilitate the process, Kaleideum formed a strategic planning committee comprising staff and board members. The committee convened four times throughout the process, providing input and feedback. Between meetings, the committee received specific tasks to inform the plan's progression. Additionally, the museum Board of Directors dedicated time during three fiscal year 2023 meetings to contribute feedback and insights to the plan. Utilizing input from all stakeholders, including R&L Consulting, Kaleideum's Senior Leadership team drafted the Strategic Plan and incorporated feedback and comments. While strategic foresight typically entails long-range planning that plans for 30 years or more, the team focused on a five to 10-year timeframe for this exercise due to its move to a new location and the uncertainties surrounding the first four years after its move.

Environmental Scan

The Strategic Planning Committee utilized a tool called Diigo that is integrated into the internet search browser to identify pertinent issues for consideration in the planning process. These issues were categorized using the acronym **STEEP**, representing **Social/Cultural, Technological, Environmental, Economic, and Political** factors, along with an additional category specific to Winston-Salem and its vicinity. Through this scanning process, various trends and challenges emerged, including experiential education, advancements in artificial intelligence, an increasingly polarized political climate, climate change, declining birth rates, a surplus of available jobs, the college cliff phenomenon, and other factors that will impact the region, community, Kaleideum, and its staff in the coming years. By combining these identified trends and future-oriented ideas with the recognized needs of the community and staff, we developed outcomes for Kaleideum's future goals and corresponding tactics.

Timing and Focus of Strategic Change

Relocating/opening a new museum presents complex challenges for Kaleideum. The museum must streamline operations from older campuses while concurrently designing and launching a distinctively different location. Upon reviewing Kaleideum's goals, it became evident that many of them are short-term in nature, involving the successful opening and operation of the new building, delivering programs in a new and updated manner, designing novel programs and experiences to reach a broader audience, and continuing the meaningful work around diversity and inclusion. Looking ahead, we anticipate managing three distinct phases of activity throughout the next strategic plan:

New building: This phase encompasses the move-in process, establishing operations, developing relevant policies and procedures for the new location, and planning for the future.

New initiatives and focus: During this phase, Kaleideum will redesign existing programs and experiences while planning for new ones based on community needs and available resources in the new space.

Creating a sustainable future: The third phase involves forward-looking strategies to ensure the museum's financial and organizational sustainability.

Timeline



Strategic Priorities

Reputation: Advance Kaleideum's positive reputation and role as an essential local and regional museum.

Experiences: Encourage creative problem solving through informal science discovery, arts/cultural experiences, and building foundational skills through play.

Access: Be welcoming and accessible so that all visitors can find meaning in high quality engaging experiences.

Culture: Create an organizational culture in which excellence, diversity, and retention of employees and volunteers are priorities.

Finances: Ensure business continuity through financial growth and diversified revenue streams.

Theory of Change



KALEIDEUM INPUTS



- New museum centrally located in the heart of downtown Winston-Salem
- Community partnerships and collaborators including city, county, WSFCS, colleges and universities, and other non-profits
- Attendance/visitors
- Members
- Student visitors
- Group visitors
- Birthday party visitors
- Financial resources (public funding, earned income, unearned income)
- Individual, Corporate, Foundation Funders
- Volunteers, Board
- Staff
- Exhibitions
- Access programs (Museums for All, Blue Star, Community Access passes, Outreach Memberships)

KALEIDEUM ACTIVITIES



PROGRAMS/AREAS:

- Floor programming/guest engagement
- Camps
- Birthday parties
- Special events (Literacy Fair, Engineering Festival)
- Field trips to explore the museum and/or take special classes aligned to NC curriculum standards
- Outreach (things not in the museum building)
- Programming geared toward adults
- Invention Convention
- Robotics teams and competitions
- Permanent exhibitions
- Traveling/feature exhibitions
- Planetarium/Digital Dome
- Professional development for educators

KALEIDEUM:

- Hires diverse staff with experience and knowledge in their field
- Provides knowledge and tools for staff to be successful
- Provides professional development opportunities
- Establish an endowment
- Diversify and increase donor base
- Evaluate profitability of current and new programs

SHORT-TERM OUTCOMES: For Kaleideum & Community



CHILDREN/ADULTS WILL:

- Love to learn
- Practice skills of innovation and kaleidoscopic thinking

STAKEHOLDERS ARE:

- More engaged in programming and events
- More informed about impact and X, especially if they are donors or funders of mission

EDUCATORS WILL:

- Strengthen their professional practice through experiential, learner-driven programs
- Utilize Kaleideum as a way to bring abstract concepts to life

ADULTS AS CAREGIVERS WILL:

- Understand and value play
- Value lifelong learning
- Become active partners in childhood learning

ALL VISITORS WILL:

- Seek out Kaleideum as a destination
- Experience a safe, beautiful, compelling museum environment
- Experience learning as a form of recreation

KALEIDEUM WILL:

- Increase capacity through strengthened volunteer and internship programs
- Fund its mission through diversified earned and unearned income strategies/revenue streams
- Reduce reliance on public funding by increasing earned and unearned income streams
- Value, appreciate, and reward staff
- Retain staff with competitive non-profit salaries and benefits

LONG-TERM OUTCOMES: For Kaleideum & Community

Cultivate a pervasive culture of confident, creative problem solvers through the development of foundational skills and the overlapping lenses of STEM, the arts and expression.

Sustain growth as a learning and recreational destination.

Build a community in which learning is accessible to all.

Ambitious sustained financial growth through current, new, and diversified revenue streams

Reflect the diversity of the community through our people, products, and processes and readily engage across differences.

Contribute to community initiatives to raise reading levels through the science of reading.



Become an organization that plays a role in which:

Individuals grow and our community thrives through kaleidoscopic thinking.















Advance Kaleideum's positive reputation and role as an essential local and regional museum.

	FY 2023-24	FY 2024-25	FY 2025-26	FY 2026-27	FY 2027-28
1. Successfully transition from two locations to one iconic, compelling museum.	■				
2. Expand marketing and public relations initiatives around programming for older children, adults, and senior citizens while retaining those that establish Kaleideum as a top family destination.			■		
3. Share the impact of Kaleideum through an annual report.	■	■	■	■	■
4. Expand Prism priority programs including Invention Convention and robotics by a minimum of one school annually.	■	■	■	■	■
5. Develop a signature event that attracts tourists and drives overnight stays.			■		
6. Cultivate relationships with restaurants, hotels, and other attractions to offer incentives to members and out of town visitors.	■				
7. Invest in market research to identify effective channels for reaching key audiences.	■				
A. Target marketing strategies to specific audiences.	■				
B. Evaluate website for search engine optimization and design of navigation.	■				
C. Establish new marketing relationships with key local and regional influencers.	■				
D. Engage museum constituents as advocates and "word-of-mouth" marketers.	■				



#2 Experiences

Encourage creative problem solving through informal science discovery, arts/cultural experiences, and building foundational skills through play.

	FY 2023-24	FY 2024-25	FY 2025-26	FY 2026-27	FY 2027-28
1. Ensure the alignment of exhibits with the current NC curriculum standards while also offering free supplemental resources for visitors and educators. By providing up-to-date materials and incorporating relevant technologies, specific exhibits will be equipped to offer independent open inquiry activities.					
2. Establish an Education Advisory Council (EAC) to identify gaps in the North Carolina education curriculum and the community and create partnerships and programming to address those weaknesses.					
3. Expand experiences for birth-K, teen, and adult audiences to make museum encounters dynamic, encouraging return visits and strengthening audience engagement.					
A. Promote the value of play and encourage visitors to actively participate in learning.					
B. Align programming with community interests and collaborate with partners to complement and support internal resources.					
C. Utilize Try It! Studio and Digital Dome to appeal to distinct audiences.					
D. Offer at least three different feature and/or traveling exhibitions annually.					
E. Expand events and programs for 21+ audiences.					
4. Offer professional development for educators to strengthen their capacity to deliver experiential, learner-driven programs to students and bring abstract concepts to life.					

Be welcoming and accessible so that all visitors can find meaning in high quality engaging experiences.

	FY 2023-24	FY 2024-25	FY 2025-26	FY 2026-27	FY 2027-28
1. Ensure that each point of contact with our visitors is welcoming and increases their connection with the museum.					
A. Adopt “Learning Together” philosophy as customer service model and provide training to staff at all levels.					
2. Reflect the diversity of the community through our people, experiences, and processes.					
A. Inclusion and accessibility in communications and social media (photo descriptions, subtitles on videos with people speaking, accessibility audit of our website, etc.)					
B. Recruit board assistance in attracting new board members that reflect diverse populations and ideas.					
3. Scaffold exhibits, programming and the physical space so that all ages and abilities can engage with the museum in a meaningful way.					
4. Remove barriers for visitors with physical and cognitive disabilities.					
A. Survey and partner with local organizations that work with persons with disabilities to learn more about their needs and assess how Kaleideum can meet them.					
B. Customize programming to accommodate visitors with disabilities.					
C. Develop accessibility narratives for the new building.					
D. Provide closed captions on all videos.					



	FY 2023-24	FY 2024-25	FY 2025-26	FY 2026-27	FY 2027-28
5. Reach out to communities that are historically marginalized* and ensure they are represented in exhibits and programs.					
A. Identify, create, and enhance partnerships with specific communities encompassing diverse audiences.					
B. Offer all signage and captioning in both Spanish and English.					
C. Increase utilization of Museums for All, Blue Star Museums, Community Access Passes, and other access initiatives.					
D. Create a discounted membership for people who qualify for Museums for All.					
E. Commit to at least two reduced admission community events annually.					

* Marginalized communities refer to groups of people who experience social, economic, or political disadvantages, often due to their minority status or other intersecting factors. These communities may face systemic barriers, discrimination, and limited access to resources, opportunities, and decision-making processes, which can lead to their exclusion or limited participation in society.

#4 Culture

Create an organizational culture in which excellence, diversity, and retention of employees and volunteers are priorities.

	FY 2023-24	FY 2024-25	FY 2025-26	FY 2026-27	FY 2027-28
1. Apply an equity, inclusion, and accountability lens to organizational decisions.					■
2. Recruit and retain a diverse staff with the skills and passion to further the museum's mission.					
A. Complete a compensation analysis to create a plan for competitive salaries, benefits, and pay equity.		■			
B. Provide professional development opportunities for staff.	■	■	■	■	■
C. Ensure that the museum is appropriately staffed to avoid burnout and turnover.			■		
D. Retain a minimum of two Spanish-speaking, front-facing staff.	■	■	■	■	■
E. Create a standard onboarding protocol and process.		■			
F. Create and document a manual of operational policies and procedures.			■		
3. Maintain and enhance a diverse, dynamic, engaged board representative of our entire community.					
A. Establish guidelines for board involvement and engagement.		■			
B. Determine and implement plan to right-size the board.					■
C. Audit onboarding process for board members.				■	
D. Leverage board expertise to further advance the work of the museum.	■	■	■	■	■



	FY 2023-24	FY 2024-25	FY 2025-26	FY 2026-27	FY 2027-28
4. Increase capacity through strengthened volunteer and internship programs.					
A. Provide practical work experience and mentoring for interns.					
B. Activate and leverage community advisory board (CAB) for support and advocacy.					
C. Recognize, celebrate and steward volunteers for their gift of time.					

#5 Finances

Ensure business continuity through facilities planning, financial growth, and diversified revenue streams.

	FY 2023-24	FY 2024-25	FY 2025-26	FY 2026-27	FY 2027-28
1. Successfully conclude and reach the goal of the All In capital campaign.	■				
2. Create long range plans to address future capital needs.					
A. Create exhibit and facility maintenance schedules.		■			
B. Create a 15-year Capital Improvement Plan.				■	
C. Coordinate maintenance and capital needs into a separate capital budget that augments operating budget annually.					■
3. Establish annual special project funds for purchase of new feature exhibitions, rent traveling exhibitions, and/or refurbish current exhibits.			■		
4. Establish an endowment with the proceeds of the sale of Kaleideum Downtown and initial Prism funds.					
A. Update investment policy based on funding.	■				
B. Establish intent with endowment with a withdrawal policy and parameters for how it can be spent.	■				
C. Determine withdrawal policy for annual Prism endowment funds to support the operating needs of Prism programming.	■				
5. Reduce reliance on public funding.					■
6. Increase annual budget by 25%.					■
7. Increase and sustain earned income.					
A. Develop themed arts and STEM-based birthday parties that align with popular topics.			■		
B. Sustain general weekday admission visits beyond admissions increase due to new museum opening.				■	
C. Reach and maintain a membership base of a minimum of 2,500.					■



	FY 2023-24	FY 2024-25	FY 2025-26	FY 2026-27	FY 2027-28
D. Charge a fee for most Digital Dome programming.	■				
E. Annual environmental scan to review and determine pricing structure for core functions including admission, membership, camps, etc.	■	■	■	■	■
F. Increase paid guest engagement and ticketed event attendance.		■			
G. Design Gift Shop merchandising to reflect exhibitions and attract sales.	■				
H. Maximize rentals through Sterling Group and use opportunities presented by the new location.	■				
I. Increase field trip revenue by including middle and high school level programming.				■	
J. Evaluate profitability of current and new programs.	■	■	■	■	■
8. Increase and sustain unearned income.					
A. Diversify and increase donor base.			■		
B. Strengthen annual giving program through recurring monthly gifts, individual solicitations, and comprehensive stewardship plan.		■			
C. Institute a Kaleideum Giving Day to replace the spring appeal.		■			
D. Establish a planned giving program/initiative.					■
E. Strengthen corporate sponsorship program.		■			

*Inspiring wonder, curiosity, and lifelong learning
in our children and community through
interactive play and discovery.*



kaleideum.org