

Strategic Planning in the Arts

Planning as an art and craft

Bill Byrnes, *Management and the Arts*, 4e – 2009



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■ OUTLINE

- Preparing to plan – the challenges
- What do we want accomplish in planning?
- Mission & Vision Issues – Do we actually agree?

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■ OUTLINE

- Organizational Assessment
Process – Can we be honest here?
- Formulating and implementing
plans
- Monitoring and adjusting the plan
in action
- Assessing the outcome

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What do we want to accomplish?

- Do we want to be bigger (more staff, bigger theatre?), offer more programming, add new series? Do we have a clear sense of where we want to be at some future point in time?
- Does our organization need to get in the “habit” of planning at all? In other words, do we have the resources to sustain a routine planning process?
- Is there really anything special or different about planning for an arts organization?

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Preparing to plan – Challenges

- Develop agreement about the process you are going to use
- Develop the organization's culture (values and beliefs) to support ongoing planning and then promote active engagement by the Board and Staff
- Develop the infrastructure and data support systems to support the planning process you do agree upon

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Preparing to plan – Challenges

■ Other views on planning?

“An organization can *plan* (consider its future) without engaging in *planning* (formal procedure) even if it produces plans (explicit intentions); alternately, an organization can engage in planning (formalized procedure) yet not plan (consider its future)....”

H. Mintzberg, *The Rise and Fall of Strategic Planning* (1994)

. . . DISCUSS . . .

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Preparing to plan – Challenges

Predictable conditions in organizations:

- Lack of common planning vocabulary – define terms
- Lack of agreement about process and control – Is this a staff or board driven activity?
- Lack of planning behavior and discipline

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Preparing to plan – Challenges

Predictable conditions in organizations:

- Board and staff have differing priorities, AKA the Politics of Planning (or Hidden Agenda 101)
- Lack of budgetary resources to support plans if and when they are implemented – Planning in a budgetary vacuum

Graphic Overview of the Process – Draw them a picture?

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Mission & Vision Issues

"One of the primary reasons for creating a strategic plan is to establish a common understanding of, and ambition for, the organization's work." Allison & Kaye, *Strategic Planning for Nonprofit Organizations*, 2005

- ❑ The Mission Statement: Who are you, why do you exist and what do you do? Does the mission statement answer these questions? Is the purpose clear?

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Mission & Vision Issues

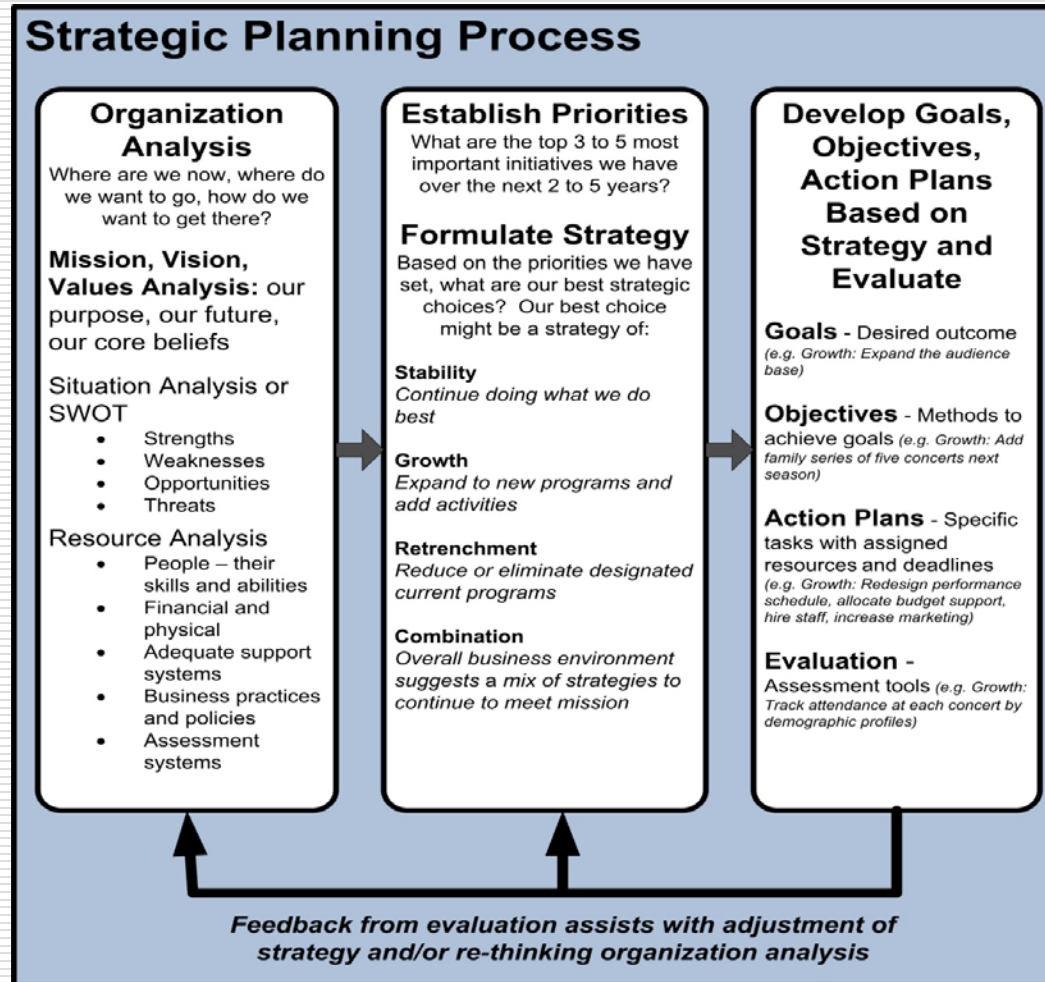
- ❑ The Vision Statement: What will success look like if are able to fulfill the mission? Is there a need for an external and internal vision statement?

Important consideration: Will anyone be able to remember and repeat your mission and vision?

Quick Quiz: How many mission or vision statements do you actually remember?

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Overview of the planning process



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Organizational Assessment Process

Can we be honest here?

SWOT – **S**trengths, **W**eaknesses, **O**pportunities and **T**hreats

Assumptions built into this particular process and coming to grips with the inherent problems and limits of being self-critical

- ❑ Data and information collection – Timeliness, situational bias, and the impact on data gathering
- ❑ Recognizing organizational structural flaws and making repairs before going forth to develop your plans

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Organizational Assessment Process

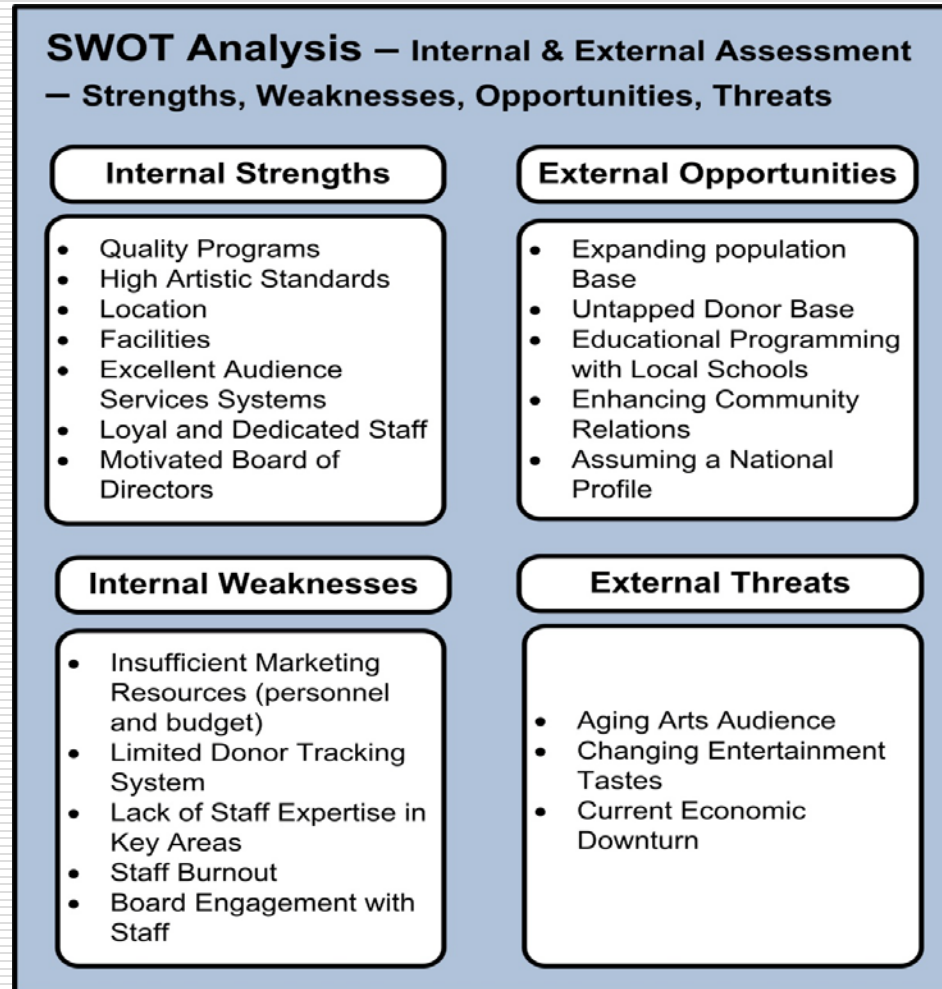
Can we be honest here?

SWOT – **S**trengths, **W**eaknesses, **O**pportunities and **T**hreats

- ❑ Being honest with ourselves about our financial resources, budgeting habits, and revenue generation potential through sales and donations
- ❑ The optimism problem in the face of reality or the:
“We can do anything we set our minds to” syndrome

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Developing a SWOT Analysis



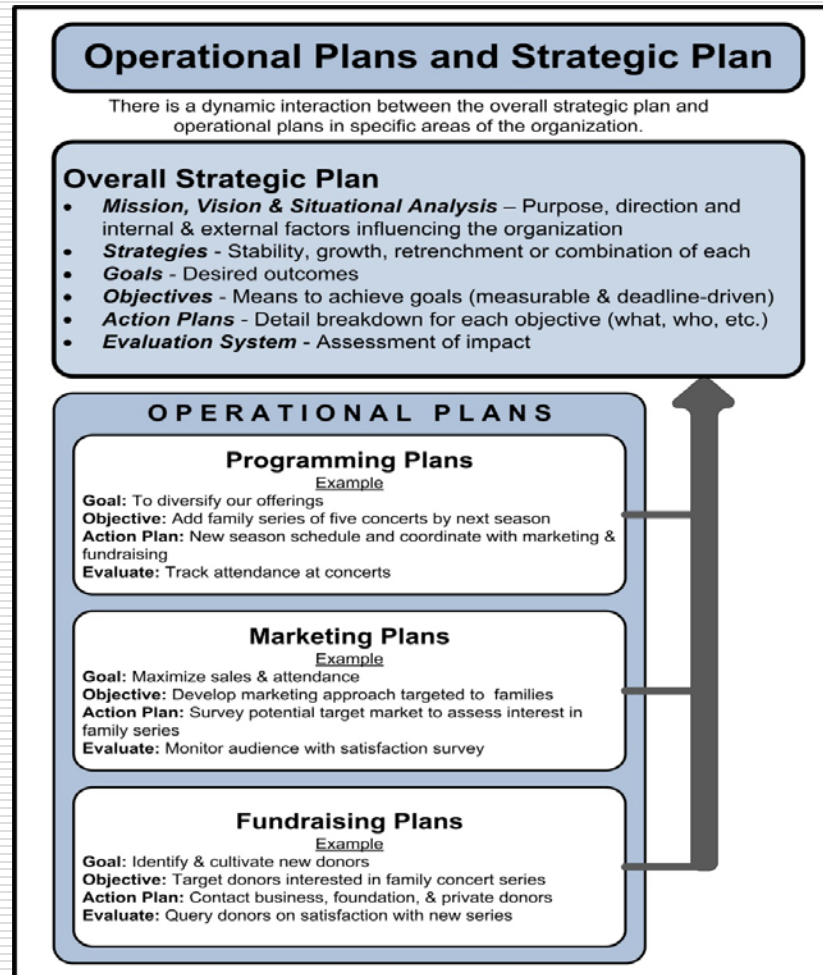
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Developing a Planning Document

Sample Planning Document – The Moving Edge Dance Company					
Our Mission: To entertain and engage our audiences and our community through the power of contemporary dance					
Our Vision: To be known internationally as a company that produces new works that extends the boundaries of dance					
GOALS	OBJECTIVES	ACTION PLANS	ASSIGNMENT	BUDGET	STATUS
Develop a larger audience base	Increase the number of season ticket buyers by 5% and revenue by 8% by June 30	Develop detailed marketing and PR plan for next season by August 1 <ul style="list-style-type: none"> Create sales objectives for each series Assess effectiveness of current ad campaigns 	Marketing & PR Director	Marketing & PR budget	In progress – draft to be completed by June 1
		Complete research analysis of last 5 years of ticket sales by 6/30 <ul style="list-style-type: none"> Identify optimal mix of programming and performance dates Develop detailed revenue per seat for the season 	Marketing & PR Director and Business Manager	No direct costs anticipated	Not started
		Develop new ticket flex-plan series by July 30 <ul style="list-style-type: none"> Research ticket buyer preferences from database Meet with focus group to discuss likes and dislikes of flex-plans 	Marketing & PR Director, Ticket Sales Staff, Focus Group Director	Marketing & PR budget - \$2000 for refreshments and focus group leader	Focus group scheduled for June 15

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Relating Strategic to Operational Plans



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Formulating and implementing a plan

- ❑ The Planning Retreat: Build interest through planning a solid agenda, setting the date, time and place to maximize attendance
- ❑ Using an outside facilitator
- ❑ The Retreat itself: Mix the social and the business part of planning with an eye toward actually enjoying yourselves
- ❑ Establish buy-in to the overall plan

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Formulating and implementing a plan

- ❑ Focus on philosophy (Mission/Vision) and develop Goals (Strategy) but leave objectives and action plans (Tactical) to staff and small Board work groups
- ❑ Widely disseminate the plan (publish, website, etc.) and then use it!
- ❑ **SMART** Planning document: **S**pecific, **M**easurable, **A**ttainable, **R**esults-oriented, **T**imely

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Assessing the outcome

- ❑ Timing & Personnel: How often, in what depth, by whom?
- ❑ Structural recognition of accomplishments
- ❑ Failures? Or do we call them non-accomplishments? Dealing with falling short of the objectives without blaming

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Assessing the outcome

- ❑ Adjusting the planning process to outcomes
- ❑ Being on guard for getting in a planning routine that becomes too comfortable
- ❑ Key Points:
 - Keep it within the scope of your organization by developing a planning process that can actually be done by you and your board

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□ Key Points:

- Be realistic about donations, grants, and earned income
- Develop a system for documenting the plan, reporting your progress and announcing your achievements

□ Your personal planning process

- Do you have a personal planning process you use? *Practice what you preach?*

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Questions?

Suggested resource:
<http://www.mystrategicplan.com/>