

# “ PART 1: Understanding and Getting Started on Strategic Planning”

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**WEBINAR  
SERIES** **FOR ARTS**  
**PRESENTING**



ONTARIO  
PRESENTS

Canada 

## Reminders

- You can hear us, we cannot hear you!

## Can't hear?

- Try turning up your volume
- Call in by phone or use your computer headphones

**Have a question?** Use the chat box, any time. Will have time at the end and after the webinar.

## Downloads

- Webinar recording
- PPT Slide presentation
- Handout: "SWOT Analysis"
- Resources at the end will link you to topics on Strategic Planning

# Agenda & Learning Objectives

Here are the principle concepts and learning objectives for this first webinar on Strategic Planning:

- 1.The importance of strategic planning; why we do it and ways to use the plan when completed.
- 2.What are the components of a strategic plan?
- 3.What are the barriers to doing planning?
- 4.What is a MISSION STATEMENT and how to write one.
- 5.The elements of a SWOT Analysis...your homework will be to complete before Part 2 next week. The information gathered will be used to develop Strategic Directions.

“IF YOU DON’T KNOW WHERE YOU ARE  
GOING ... ANY ROAD WILL GET YOU THERE.”

Alice in Wonderland, The Cheshire Cat



# Strategic Planning is...

- Incorporated non-profits have an obligation and responsibility to stakeholders, to keep the organization viable. Means both day-to-day and long-term. This is a **GOVERNANCE FUNCTION** of the **BOARD** of Directors (you can delegate the responsibility to do this but you are still accountable).
- Searching for the “*best* future and planning how to reach it!”
- Defines **WHAT** you want to be
- Defines **HOW** you intend to get there
- Includes:
  - **Gathering information**
  - **Exploring alternatives**
  - **Looking at future implications of present day decisions**
  - **Taking action**

# Some reasons why we do planning

Some of the reasons include:

- Helps address critical issues
- A way to address change
- Be proactive, rather than re-active
- Find innovative ways to achieve goals
- Decrease crisis management
- Use resources effectively and efficiently
- Gain commitment and bring the group together/everyone on the same page

**It does not have to be scary....why we do it.**

Think of your plan as a 'touchstone' ....

Ideas and challenges merge to create the best organization.

We often plan to address challenges like funding ....or to minimize risk management.

We have several areas that need our attention:  
Human Resources, Programs and Services,  
Legal, Administration, Finance, Long-term  
viability.

# Ways to use the plan once completed

Plans were not meant to sit on shelves. They need to be implemented.

Many organizations use their completed strategic plans to:

- Promote the work of the organization
- Show stakeholders/donors and funders the rationale for funds
- Illustrate growth and development in services
- Show the community impact of services/provide new directions to fill gaps or address needs in the community
- Provide the guide to board meeting agendas; accountability for completion of plans
- Provide direction to staff on priorities and work

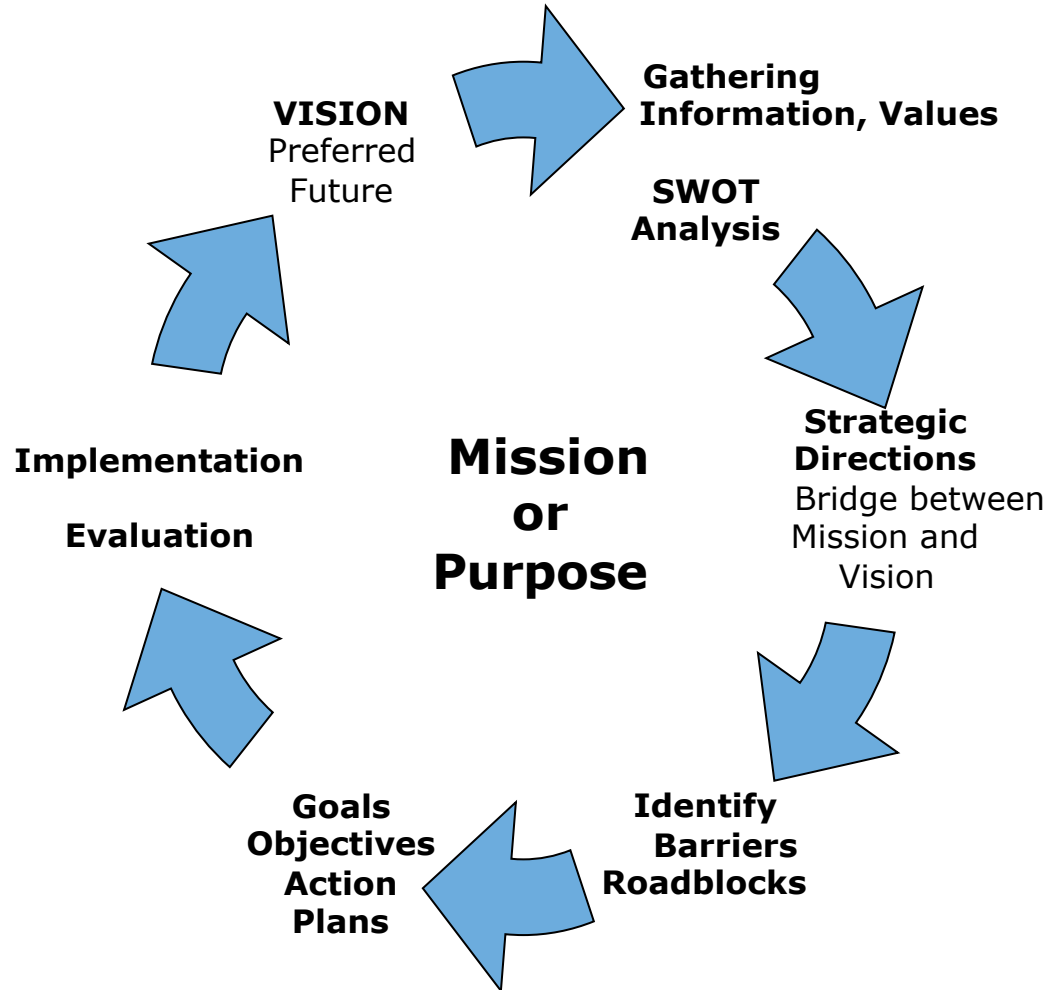


# QUIZ: What barriers to planning?

What is the primary reason/barrier that stops your organization from doing strategic planning? Select one from the list below.

1. Time commitment – getting everyone together to do it.
2. Lack of understanding of process, how to do one.
3. Not sure how important it will be to us.
4. It costs too much to hire someone to help us.
5. We did planning in the past and once done, we never did anything with it.
6. Our organization is too unpredictable, so a plan would not help us.
7. Other? Type in chat box

# Planning is cyclical and ongoing...



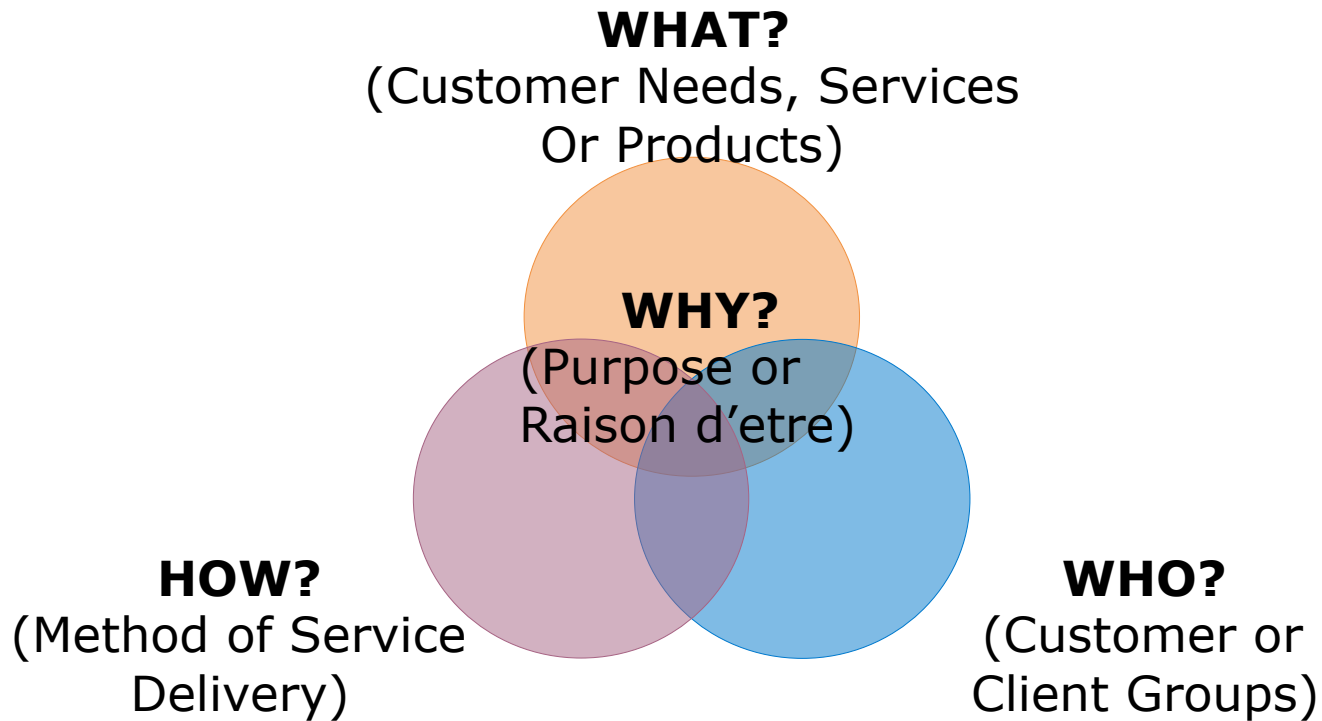
# MISSION Statement:

What is the purpose or mission of the organization – we need to know clearly our reason for being. “What business are we in?”

Most organizations have a Mission Statement already. Usually we do not need to review it. But we should make sure it defines what business we are in.

- What Value do we add?
- Explicit enough so we know what we will and will not do.

# The Key Elements of MISSION Statement



# Sample: Museum MISSION

## Toledo Museum of Art:

“We believe in the power of art to ignite the imagination, stimulate thought and provide enjoyment. Through our collections and programs we strive to integrate art into the lives of people.”

# Sample: Art Gallery MISSION

## **ART GALLERY OF PETERBOROUGH:**

“As an exhibition venue with educational programs, the AGP will present a variety of visual art experiences and explorations to stimulate and expand public perception of art as a part of our life and community.”

# Sample Mission Statements you provided....

WHAT WHY WHO and HOW

1. “Using art to connect people to public spaces”.

2. “To present and promote music & the arts in Northern Ontario”.

# Step 1: Gathering Information

## Background Information

- Gathering information helps provide us with the context for planning
- What Trends, Data in our field do we need to know?
- What studies have been done that would provide useful information?
- What's happening in the arts, culture, heritage sector that is affecting our work?
- Examine all the information that could impact your plan

## Conduct a “SWOT” Analysis

- Values – reaffirm values, principles
- Strengths & Weaknesses...both internal
- Opportunities & Threats ...both external



# VALUES

What values would you select that best represent the work that your organization does?

A value can be defined as “important and lasting **beliefs or ideals shared by members of a common group** or culture about what is good or bad and desirable or undesirable. Values have a **major influence on our behaviour and attitude and help serve as broad guidelines in situations.** “

Your organization was founded on some key values. And when we ‘walk the talk” we demonstrate the values that are important.

You need to examine the values your organization represents and determine are they still relevant? Need adjusting? Need to add to.

# Some values to consider

- Respect
- Teamwork
- Creativity of the individual
- Empathy
- Trust
- Honesty

What would you add to the list? Take a few minutes and post some of the values you think your organization has (use the chat box for this webinar).

# SWOT Analysis

## 1. Strengths (internal)

- What do you consider to be the strengths of your organization?
- What is so good that you want to build your future on it?
- What's working or what is great?
- When someone in the community says “ Moonlight Theatre” ...”what is the strongest feature? What immediately comes to mind?

# Strengths of the Organization are....

Time to reflect and list the strengths.



You want to consult others on this (include current volunteers, staff, clients, funders, past volunteers). If you are able, include a stakeholder to help you develop this list or show it to them and get their reaction to what you considered strengths.

I gave you a SWOT Handout for this webinar. Take a look at the S section and take a couple of minutes right now to add something. **Would anyone like to share a “S” with us?**

## **2. Weakness (internal)**

- What do you consider to be the present weaknesses of the organization?
- What is not so good...that you want to eliminate it?
- What issues keep surfacing that you want to eliminate?
- If someone in the community had a negative comment what might it be?

# Weakness...

Make a list of the areas the organization might consider as 'weak.' Again, you will want to consult with stakeholders.



I gave you a SWOT Handout for this webinar. Take a look at the W section and take a couple of minutes right now to add something. **Would anyone like to share a “W” with us?**

# 3. Opportunities (external)

- Are there gaps in services in our community that we might fill?
- What partnership opportunities should we develop?
- What ideas or hidden opportunities might be there for us?
- Is there something we are currently doing that we should be expanding?

# Opportunities are....

Time to reflect and consider opportunities. Stakeholders would help here as well.

List your opportunities.

I gave you a SWOT Handout for this webinar. Take a look at the O section and take a couple of minutes right now to add something.



Would anyone like to share a “O” with us?



## 4. Threats (external)

- What are the current issues/challenges coming from outside the organization?
- What major threat will we encounter over the next 3 years?
- What issue might threaten the work or existence of this organization?

# Threats are....

Time to list the threats you consider important. Stakeholders would help here as well.

I gave you a SWOT Handout for this webinar. Take a look at the S section and take a couple of minutes right now to add something.

Would anyone like to share a “T” with us?



# Summary

- You have just completed a few of the steps in the planning process.
- Much of it is the gathering information especially the SWOT information.
- You should also have knowledge and information about your arts organization; the competition it faces; what else is in the community around you; the profile of human resources both staffing paid and volunteers/challenges and issues; any funding challenges; facility concerns; what are the demographics of your community and the socio-economic status; will this information have an impact on your work?
- And you have a good start on building the 4 areas in the SWOT Analysis.

# Homework...

**HOMEWORK:** your work for next Wednesday is to fully develop as much as you can in the SWOT Analysis.

- You started to use the Handout Sheet in order to complete this task.
- If you can involve some others in the development of these areas, this will enrich the areas you can build on (S and O) and the areas you can eliminate (W and T).
- SWOT is like the foundation of any building ... you cannot put on the first floor until the footings/foundation are done. This is really the context for planning.

# Next Week

Next week, we continue our planning journey by examining the remaining elements of a strategic plan.

- Vision
- Strategic Directions
- Goals
- Objectives
- Action Plans

# Questions posted today....



# Resources

1. Overcoming Barriers to Strategic Planning. Article on Charity Village

[https://charityvillage.com/Content.aspx?topic=overcoming\\_barriers\\_to\\_strategic\\_planning#.VmXfK7grLq4](https://charityvillage.com/Content.aspx?topic=overcoming_barriers_to_strategic_planning#.VmXfK7grLq4)

2. Introduction to Strategic planning

<http://www.youtube.com/watch?v=6c5kl5rJyBo>

3. Ontario Ministry of Agriculture and Food Factsheet: Strategic Planning: Is it for you?

<http://www.omafra.gov.on.ca/english/rural/facts/93-041.htm>

4. Ontario Ministry of Agriculture and Food Factsheet: Strategic Planning

<http://www.omafra.gov.on.ca/english/rural/facts/89-173.htm>

- [\*\*Strategic Planning for the Arts: A Practical Guide\*\*](#) by Michael Kaiser 2012 (resource link for the webinar)
- British Columbia Arts Council [\*\*Strategic Plan 2009-2013\*\*](#)  
(resource link for the webinar)
- [\*\*Reflections on Strategic Planning in Arts Organizations\*\*](#)  
(resource link for the webinar)
- Canada Council for the Arts: [\*\*Strategic Plan 2011-2016.\*\*](#)



Please share your feedback by completing the survey below.

[TAKE SURVEY](#)

If you still have questions please contact me and I will try to help you!

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Join us next week!

PART 2:  
**Strategic Planning**  
*From Vision to Reality*

May 11, 2016

[SIGN UP](#)