

“ PART 2: Strategic Planning: From Vision to Reality

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The RETHINK Group
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WEBINAR
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FOR ARTS
PRESENTING



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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: Exercise Sheet for webinar and Strategic Priority Tracking Sheet (a template to use with goals and objectives)
- Link to resources on strategic planning, visioning and full plan examples.

Agenda & Learning Objectives

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

1. A quick review of the Steps in Strategic Planning. What are the components of a strategic plan?
2. Focus on VISION: what is it? What questions to ask? How to write one; share some sample visions.
3. Strategic Directions: What are these? How to develop from the SWOT, mission and vision?
4. GOALS: What is a goal and how to write one.
5. Objectives: what are objectives and how to write them.
6. Developing a Timeline/Action Plan to completion.

Planning is cyclical and ongoing...



Visioning and Strategic First Steps

Strategic plans are doomed to failure unless:

1. They are rooted in the **operational realities** of the organization and **integrated** with other important and necessary planning functions – business planning, market research etc.
2. They recognize both the need to address **current issues and service needs**, and the requirement to **reposition** in anticipation of tomorrow's opportunities and threats.
3. They focus on the **critical few challenges** AND the need for **constant, incremental improvement**.
4. They are **stakeholder-driven** and **owned by the leadership team**.

Vision

- “ A vision – is the 2nd touchstone for the organization and staff”
- To do visioning: is to create a picture of a well-defined future, come back to the present with the intention of changing it to match the future.
- A picture of your ‘desired future’
- A clear image of what your organization could and should become if it is to realize its full potential
- Often expressed as Impacts, Roles and Image

- **Defines success** – provides decision makers with a clear picture of the most desirable outcome of their plans and actions – establishes a standard of excellence
- **Provides context** – sets the framework for more specific actions to follow
- **Motivates** – energizing people to get involved and help make it happen. Creates a constructive tension between the present and the future – building an impatience to move towards the preferred outcome.
- **Builds bridges** – between organizations that serve the same community.
- **Saves time and energy** – making it easy to see what options and proposals ‘fit’ and which should be discouraged at an early stage.

VISION Exercise (3 to 5 years)

Answers to these areas will help to build your VISION...

- **Build on your Strengths and Opportunities** (Anything NEW that you should be working towards? Or something you do well that should be expanded?)
- **Eliminate your Weaknesses and Threats** (What key areas do you need to solve, eliminate...turn into a positive direction?)

- **How do you see your Organization in the year 2020?**

- What words come to mind?
- What will your programs/services be like?
- Where will you be operating?
- Who will be your partners?
- What foundation pieces do you want to build on?

Take a few minutes to think about this and pull out 2-4 key ideas that you see as part of your future. Use the exercise sheet I gave you for today. IF anyone would like to share some ideas/words or program ideas or partners...post in the chat box for us...

Vision Statement

- Use the Key ideas you pulled out to craft a Vision Statement for your organization.
- **It should be written like an article in the newspaper: IT has already happened.**
- Here are a couple of examples for you to consider.

Examples of Vision Statements

National Museum of Australia: “To be a recognized world-class museum exploring Australia's past, illuminating the present, imagining the future.”

Danforth Museum of Art: “The Danforth Museum and School of Art envisions its future as a nationally recognized leader among community museums and art education centers, with an outstanding collection of American art, as well as exhibitions and programs that engage, inspire and transform the lives of children and adults.”

Art Gallery of Peterborough:

“A gathering place that engages the community and promotes the arts as a cornerstone of community creativity and development.”

What stands out for you in this vision statement? Post your comment in the chat box.

The forerunner to a vision might be here...

Canadian Canoe Museum:

“To realize its full value and significance to the citizenry of Canada, it is essential that the Canadian Canoe Museum be acknowledged and recognized as a cultural institution of national significance perhaps, like Pier 21—Canada’s Immigration Museum or the Museum of Human Rights in Winnipeg, becoming a national museum in its own right. In the meantime, “moving onto the national stage” means thinking nationally, using every means of communication, every strategy and every museological device to engage the hearts, minds and support of Canadians from coast to coast to coast.”

Benefits of Having a Vision Statement

- Provides clarity in crafting policy – which outlines the various avenues through which the mission and vision will be delivered
- Provides clarity to management in resource allocation (where to invest – AKA strategic planning)
- Provides clarity and motivation to staff in decision-making (what to do) and innovation
- Provides clarity to the outside world as to who you are and the good things you do (good for marketing, fundraising, government attention-getting) and that you are essential because nobody does what you do

- AND there is great **value in the process of developing** your Vision and Mission Statements: engages Board, staff, volunteers, key stakeholders
- The **process builds common understanding, trust, respect... the ultimate teambuilding exercise**

Strategic Directions (or Priorities)

- The present is your **PURPOSE**
- Future is **VISION** - where we want to be
- We know results of **SWOT...information gathering**
- Identify the broad areas that will move us toward vision
- These are called: **Strategic Directions – They close the GAP between our Mission and our VISION.**

Developing Strategic Directions

- Think in broad terms when trying to develop Strategic Directions.
- What strategic opportunities or directions will help us reach our vision?
- For example: “ Nationally recognized leader” is part of the Danforth Vision or the Canadian Canoe Museum
- The Strategic Direction might be called “National Status or Leadership” ...and under this we would have to find ways to achieve that recognition or status.
- If one of your weaknesses was a lack of volunteers ...then a Strategic Direction might simply be “Volunteers” under which a number of steps could be outlined to improve volunteer engagement.

Strategic Directions ...

1. Take a few minutes to look at your SWOT sheet from last week; Vision ideas and Mission...and list a couple of key strategic directions that you see emerging. Page 2 of the exercise sheet from today.

Would you post a Strategic Direction in the chat box on this webinar?

Once we have listed 3-4 Strategic Directions it is time to take action. Developing GOALS for each S.D. and the resulting Objectives is the action part of planning.

Goals form the “Bridge”



- **Goals form the bridge.**
- **They enable you to cross the gap between the present and the preferred future.**
- **They are the WHAT is to be accomplished.**

GOALS ARE SMART

- **S = Simple**
 - **M= Measurable**
 - **A = Attainable**
 - **R = Realistic**
 - **T = Time sensitive or limited**
-
- **A Goal is written as a statement with an action-oriented verb.**

Example:

“By the end of December, I will have booked a two week vacation to Mexico, that will take place in February of 2017.”

- **S = Simple ?**
- **M= Measurable ?**
- **A = Attainable ?**
- **R = Realistic ?**
- **T = Time sensitive or limited ?**

Example

SWOT: indicated a weakness is our volunteers...we don't have enough; they might not be trained; we don't have anyone assigned to deal with volunteers; they are aging and we are not increasing our numbers to keep up with demand; we do not engage youth but would like to...

Strategic Direction: Volunteers (we want to make this a focus because a) we want to eliminate a weakness and b) when we developed our vision we indicated that we would be the 'organization of choice' for volunteers interested in the arts.

Group Discussion: as a board/staff and volunteer stakeholders doing strategic planning, we would have a detailed discussion about all the areas of volunteer engagement that we need to develop. This would help us think about what our overall Goal for Volunteers should be to get us to reach our vision in 2020 and all the other goals that we will need to implement to get us there.

5 Year Goal: “By the year 2021, a dedicated staff position to engage and support our arts volunteers, will be in place. This role will help us to increase the number of volunteers in our program by 50%, from the current level of 50 volunteers to 100.” (Use the SMART Test and adjust if not realistic)

Year 1 Goal: Assign an existing staff to support and increase volunteers by 10% at the end of 2017.

Year 1 Goal: Determine the costs and feasibility of a new staff position to support volunteers.

Action Plan

- HOW? List **objectives** as to how we will accomplish this...
- For each Goal that is identified, we need to break it down into logical steps so that we can accomplish it over the next two years.
- Ask yourself: What do I need to do in a logical order to reach this goal?

Example

Goal Year 1: Assign an existing staff to support and increase volunteers by 10% at the end of 2017.

Objectives

1. The Executive Director will develop a position description for a part time Manager of Volunteers and determine skills and requirements for this role. (January)
2. The Executive Director will meet with current staff and see if there is interest/determine which staff is most suited to work more closely with volunteers. (February)
3. The duties of the selected staff will be reassigned to others.
4. The Manager of Volunteers will obtain training in volunteer engagement
5. The Manager of Volunteers will begin an assessment of the current volunteer program, especially recruitment practices.

Objectives/Action Steps

Other steps might be

- Determine which of existing strategies has the best possibility of generating more volunteers
- Determine and assess any new ideas for increasing volunteers
- Partner with the Volunteer Centre to see if they have any ideas to suggest for us
- Join local AVA to network and gain ideas

Indication that GOAL is met?

- Look at each objective/action step and ask: How will I know that this has been completed? Once the senior staff develop the position description that step is completed and you move to the next one.
- Once all the action steps have been completed, the overall GOAL has been met.

Target Date & Accountability

- Assign a date for completion to each Objective/Action Step that has been listed.
- Assign responsibility/accountability to each area; volunteer committee chair/committee or board member or staff.
- See the Strategic Priority Tracking Sheet for a template or chart to use.
- The Strategic Plan needs a document to be 'housed in.' So you can copy these tracking sheets and build your plan on them.

SUMMARY

- Strategic Planning is our best tool for helping organizations stay on track and on target. Suggest developing a 3-5 year first plan.
- Use the PLAN at meetings to update progress; identify new challenges or areas that are not being completed...take action early and adjust the plan..
- Remember it is 'a plan'- a 'road map'...things change and we need to adjust our direction and keep track of the shifts we have made.
- For any PLAN to be SUCCESSFUL it has to have a Champion....you have to USE the PLAN; adjust and report on accomplishments: hold accountable those who are working on it. Meet regularly for updates and progress reports.

- Celebrate your success!
- Remember the Plan is a living document and your road map! Always Use it.



Questions posted today....



Resources

- Museum Notes: [Re-visioning Vision Statements](#) (link to online article)
- [Onto the National Stage](#): Charting a Future Course for the Canadian Canoe Museum, Strategic Plan 2010-2020
- Online Learning for Sports Management. [Resources](#) available on all aspects of Strategic Planning.
- [Strategic Plan](#): Burlington Performing Arts Centre: 2013-2018

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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Stay tuned for more webinars next year!

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