KEEPING UP WITH CHANGE:

Strategic Planning for Cultural Institutions

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What is the question or change that brought you to this session today?

STRATEGIC PLANNING

WHEN & WHY

TO IMPROVE OVERALL PERFORMANCE

TO QUALIFY FOR FUNDING
private and public donors increasingly require evidence of accountability, such as with long-term planning.

TO ACHIEVE ACCREDITATION,
either from a recognized authority or from patrons and community members

TO PROVIDE FRAMEWORK
for new projects, initiatives or expansions

TO BOOST MOTIVATION AMONG STAFF AND BOARD

TO REPLACE OR UPDATE A PREVIOUS STRATEGIC PLAN
that has run its course.

**TO ADDRESS FORCES OF CHANGE IN THE ENVIRONMENT,**
both internal and external.

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STRATEGIC PLANNING

HOW?

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STRATEGIC PLANNING PROCESS

ENVIRONMENTAL SCAN

EXTERNAL ASSESSMENT

INTERNAL ASSESSMENT

KEY ISSUES

COMPARISON AND BENCHMARKING

STRATEGIC DIRECTIONS

GOALS

OBJECTIVES

IMPLEMENTATION PLAN

EVALUATION & COMMUNICATION CYCLE

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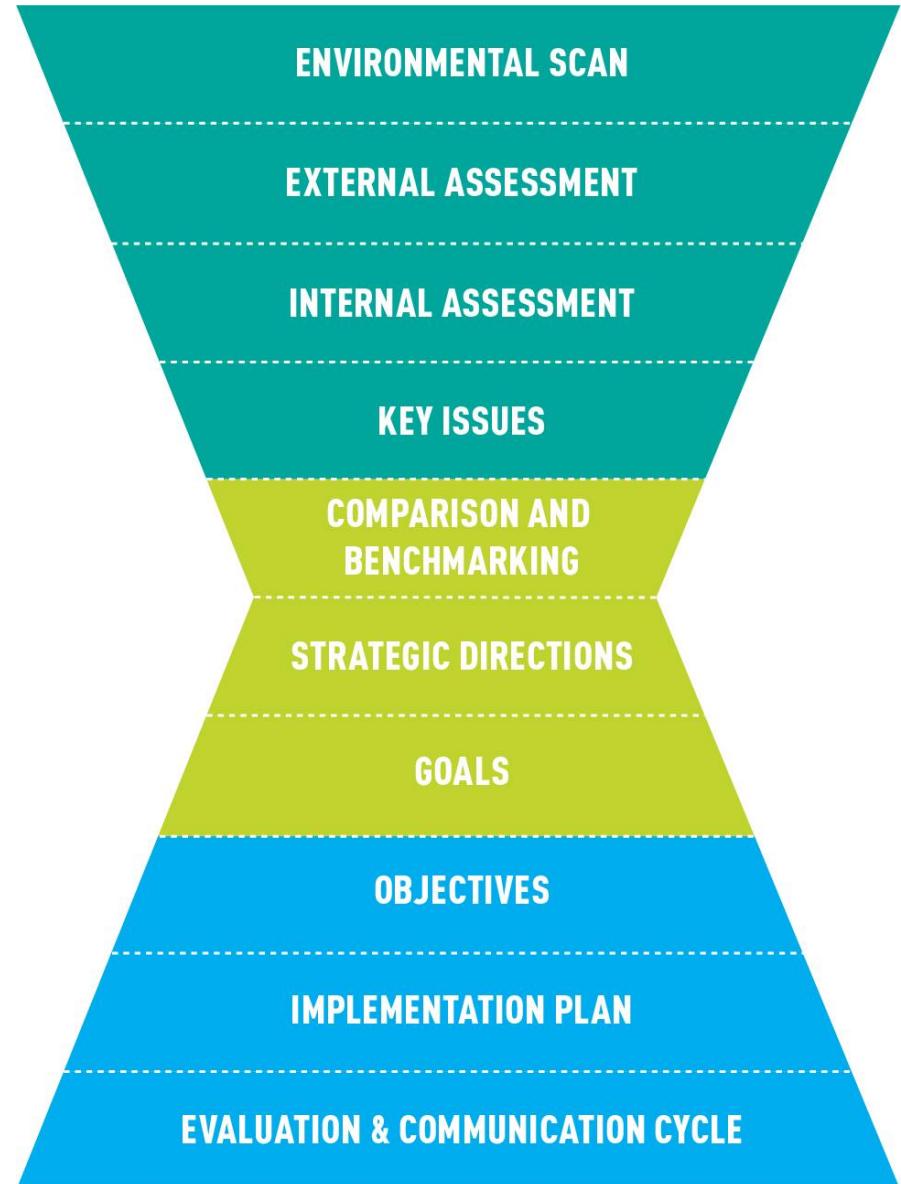
PHASE 1
CONSULTANT/ RESEARCH-LED

Give everyone in your organization an opportunity to discuss the effects of change and learn from innovations in technology, diversity, urbanization, immigration and so forth.

See and evaluate your organization from outside as others see it; consult and interview individuals outside your organization and collect their input.

Gather opinions about your organization's present performance and future direction by interviewing your board, staff, volunteers, donors, and members; make sure that you have heard all opinions.

Determine the key issues that will affect the optimal future of your organization.

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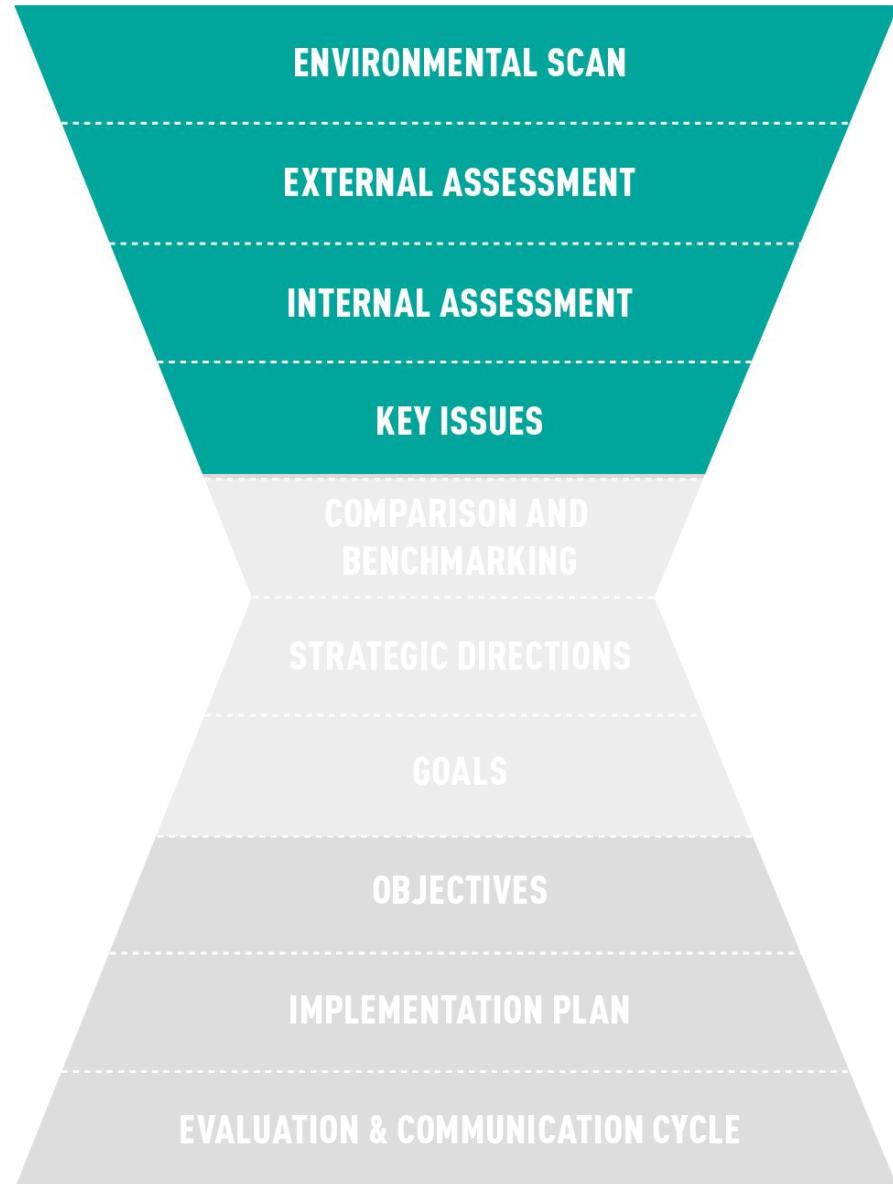
PHASE 2
LED BY STEERING COMMITTEE

Investigate how another organization has addressed similar issues.

Draft a strategic plan that aligns with your organization's mission, vision, and mandate and addresses the key issues and move the organization toward its optimal future.

Establish long range, qualitative goals that take your organization toward a future direction. Goals necessarily involve multiple functions and multiple departments leading to strategic change for your **organization.**

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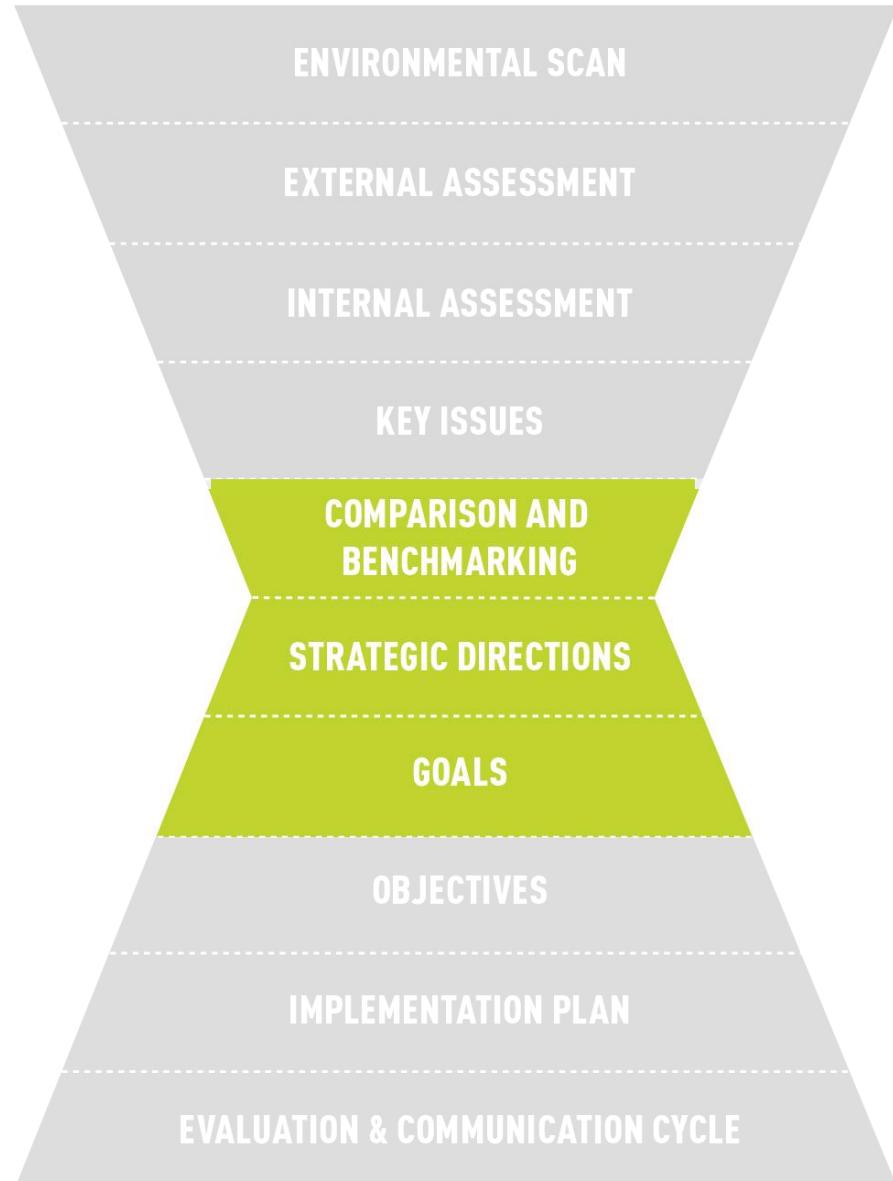
PHASE 3
STAFF-LED

Determine, along with your staff, the best way to achieve these goals.

Create a coherent and integrated plan, coordinate the achievement of your organizations' goals and ensure the accomplishment of the activity within the budget.

Evaluate the implantation process and provide progress insights to guide your staff and the board in completing what needs to be done.

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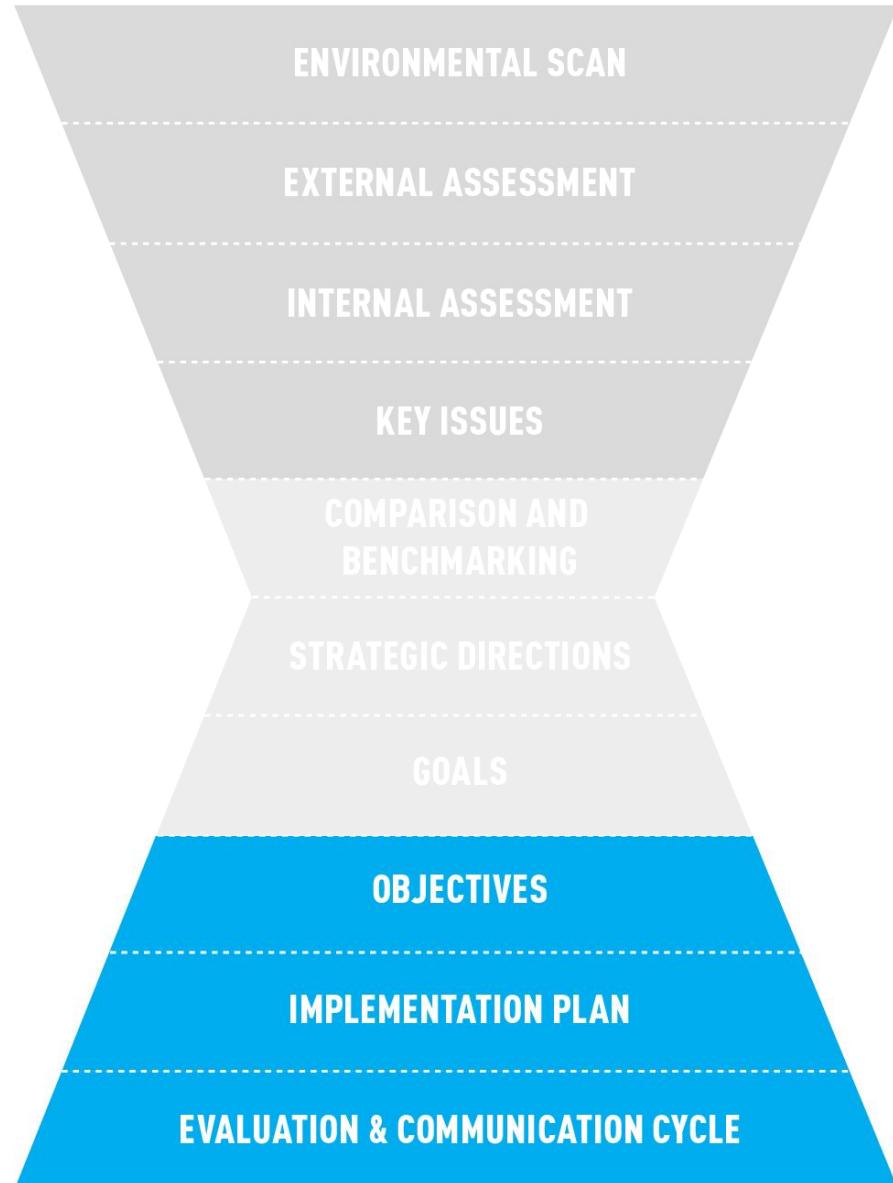
Organizing Objectives and Tasks by Goals

Goal Champion or Lead, and Title:							
Author or Coordinator, and Title:							
Department:							
Goal (#, Description):							
Objective (#, Description):							
Tasks/Steps:	Who will take responsibility for leading? *(Name, Title)*	Who is responsible for progress monitoring? *(Name, Title)*	Who else is required to assist or partner? *(Name, Title, Internal/ External)*	When will this begin?	When will this be completed?	What are the potential resources required? *(Technology, HR, Time)*	What are the estimated budget requirements?
Expected Outcome:							
Performance Measure (Qualitative + Quantitative):							
Impact Measure (Qualitative + Quantitative):							
Estimated Progress Reports (Month. Year):							

Table 8.1 Example of an implementation planning worksheet. Lord Cultural Resources.

Objectives and Tasks	Measurement	Priority	Lead and Participant	Start/Finish	Resources	Issues or Concerns
1. Review target audiences (including tourists) and define success in reaching them. Marketing, with input from all divisions, will develop a matrix itemizing all current audiences, assigning overall institutional priority to each audience group and identifying lead department(s) for cultivation of each audience group. In addition, consider the following tasks specific to existing major audience groups: a. Reach more traditional cultural users.			Marketing Education Development	By 9/1/06		
i. Continue institutional advertising program and consider expanding to WETA or WAMU (local radio stations).	Paid admissions increase by 5 percent per year regardless of programming	High	Director of Marketing	FY06–Ongoing	$200,000 per year for advertising (in operating budget)	Uncertainty of operating funds for advertising
ii. Formalize collection of e-mail and mailing addresses at admissions desk.	Goal of 20,000 e-mail addresses institution-wide; weekly report	High	Visitor Services	FY05–06/06 and ongoing	$1,500+ for computer and volunteers	Need plan for management of database

iii. Seek empty-nesters through targeted promotions with specific publications and downtown properties.	Voucher or discount offer is redeemed and tracked	Medium	Group Sales	FY06, ongoing	Funds needed to print coupon offers	Staff time: detailed promotions are time-consuming
iv. Seek members of the gay community through special promotions and events (include possible tourism tie-ins).	Track membership and admissions	High	Group Sales	FY06	About $15,000 for ads	Can this be tracked?
b. Increase tourism visitation through marketing collaborations.	Out-of-state participation measured by data collected on site	High	Director of Marketing			Uncertainty of funds to continue tracking
i. BACVA (Approach for Gee's Bend joint campaign)		Low	Director of Marketing	03/07–09/08	Regional ad, co-op money via grants?	
ii. Mt. Vernon Cultural District high-end luxury customer packaging	One per month?	High	Group Sales	06/04–ongoing	MVCD membership	
iii. Area hotel packages	Track concierge vouchers	High	Group Sales	07/04–07/06		Reporting system?
c. Grow family audience through increased membership sales targeted to families; add games(s) to the website.	Increase family memberships, paid child attendance	Medium	Membership Marketing	FY06?		Blackbaud to be adapted to carry different membership categories

Table 8.2 Five-Year Capital Spending Plan.

	Year 1	Year 2	Year 3	Year 4	Year 5	TOTAL
Roof replacement		162,800				162,800
Copper roof replacement				500,000		500,000
Roof replacement—West Building		82,000				82,000
Replace air handler—West Building			25,000			25,000
Replace air compressor—Building 1			25,000			25,000
Replace air compressor—Building 2			10,000			10,000
Replace air compressor—West Building			10,000			10,000
Chiller overhaul 1				8,500		8,500
Chiller overhaul 2					38,000	38,000
Chiller overhaul 3				32,000		32,000
Boiler overhaul 1					33,000	33,000
Boiler overhaul 2			1,600		1,700	3,300
Boiler overhaul 3			1,600		1,700	3,300
Boiler overhaul 4			1,600		1,700	3,300
Repair and paint exterior wood, windows, and brick			1,400		1,500	2,900
Seal Limestone Cupola Building	56,000	44,000				100,000
Paint interior—offices—materials only			25,000			25,000
Paint interior of West Buildling—offices—materials only		6,000				6,000
Overhaul elevators—Building	2,500	7,500				10,000
Overhaul elevators—Building					10,000	10,000
Overhaul elevators—West Building			15,000			15,000
Repair or replace AHU 4 and AHU 5 ductwork installation				5,000		5,000
Increase boiler room air make up			37,000			37,000
Screen wall renovation			10,000			10,000
Security equipment upgrades and replacements	100,000					100,000
Furniture: office equipment replacement		5,000	5,000	5,000	5,000	20,000
Overhaul water booster pump system		3,000	3,000	3,000	3,000	12,000
Cost to vacate Engineer Club space	7,000					7,000
Contingency projects	20,000					20,000
Annual totals	33,500	25,000	25,000	25,000	25,000	133,500

BUDGET PLANNING SCHEDULE

June: Fiscal year budget is adopted at board meeting.

July: Finance department issues budget to all staff members, with quarterly allocations for each line.

Monthly, throughout the fiscal year: Departments receive reports of budget variances and meet with their supervisors to discuss if necessary.

September: Senior managers meet with board strategic planning committee to lay out the large yearly objectives (this can happen earlier in the fiscal year if enough key players are available).

Early October: Staff meets with supervisors to report on first quarter progress.

Early January: Staff meets with supervisors to report on second quarter progress.

Early February: First year-end projections are prepared by finance department. Senior managers report to each other on progress to date, suggest course corrections, and discuss large budget variances and year-end projections that need to be addressed.

Early April: Staff meets with supervisors to report on third quarter progress; finance department prepares year-end projection; additional course corrections devised, if necessary.

Late May: Senior managers meet with board strategic planning committee to report on fiscal year accomplishments and projections for year-end.

June: Staff meets with supervisors to report on fourth quarter progress; strategic planning committee reports on current fiscal year progress to the full board.

WHITNEY MUSEUM OF AMERICAN ART

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A SHORT HISTORY

Founded in **1930**, the Whitney collects, exhibits, preserves, studies, and interprets art of the United States in the broadest global, historical, and interdisciplinary contexts.

The Whitney **opened the doors of its first home in 1931** with a mandate to support living artists. At its inception, founder Gertrude Vanderbilt Whitney, both an artist and patron of American art, gifted approximately **700 objects** to begin a permanent collection for the Museum that today consists of more than **22,000 works by over 3,000 artists**.

The Whitney's signature exhibition, the **Biennial**, is the country's only ongoing series devoted to surveying the most recent developments in American art.

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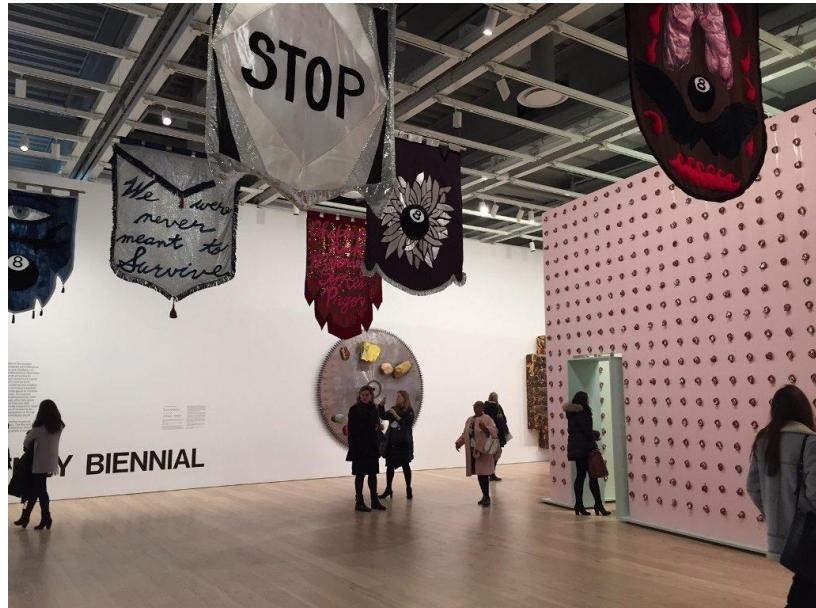
THE NEW BUILDING

Guided by a strategic plan that was ratified by the Board of Trustees in 2010, the Whitney embarked on the next big step in its history—a transformational expansion and **relocation from the Upper East Side of Manhattan to the up-and-coming Meatpacking District**.

On May 1, 2015, the Whitney opened its new building with a floor-to-ceiling exhibition drawn almost entirely from the Museum's permanent collection.
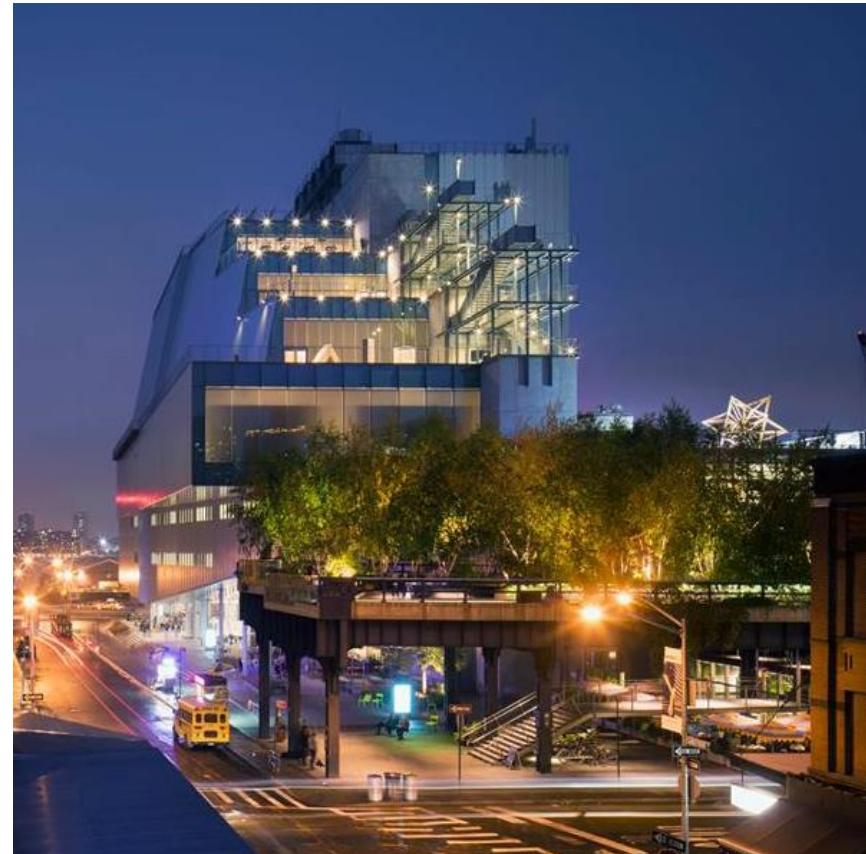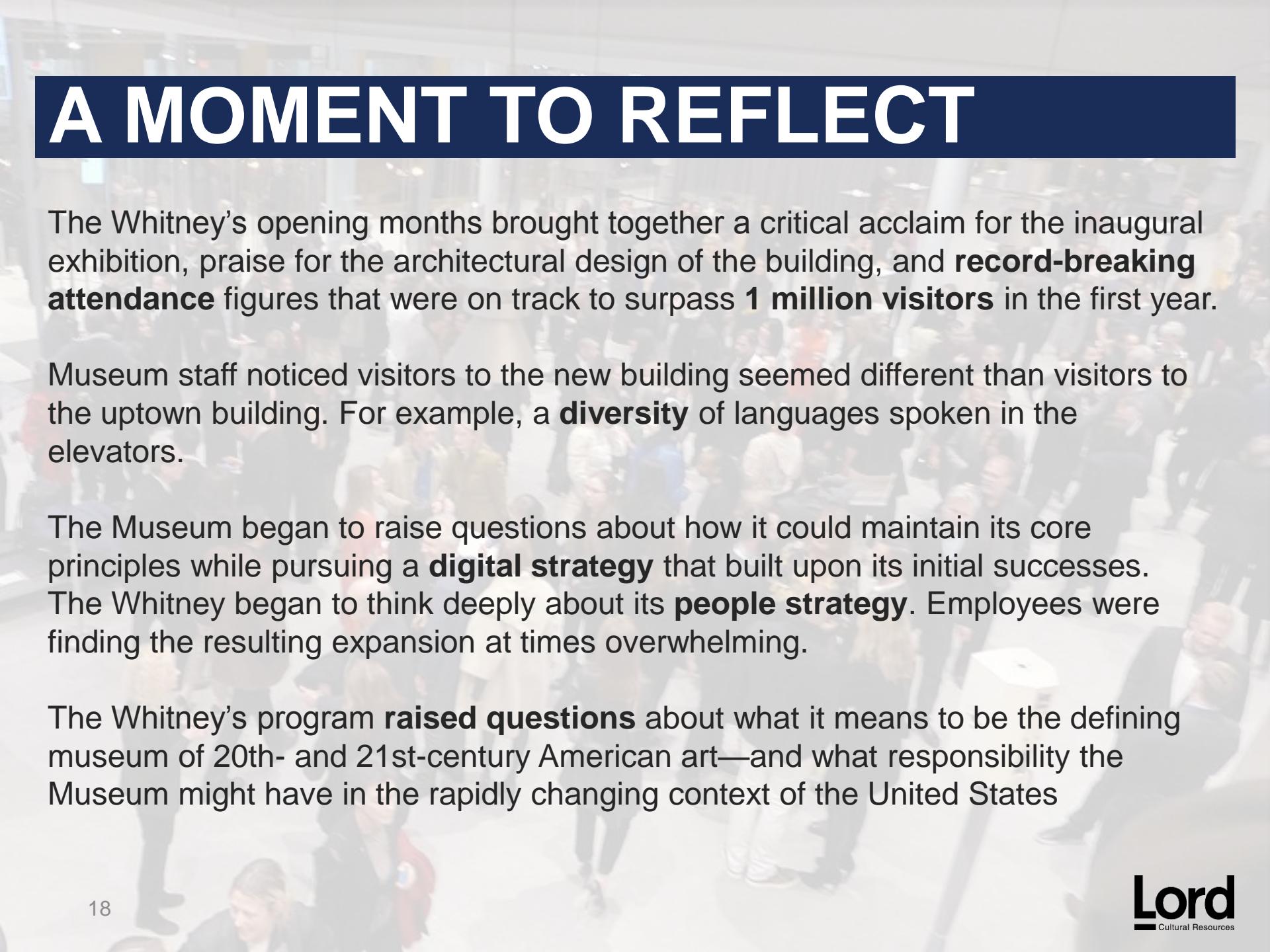
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A MOMENT TO REFLECT

The Whitney's opening months brought together a critical acclaim for the inaugural exhibition, praise for the architectural design of the building, and **record-breaking attendance** figures that were on track to surpass **1 million visitors** in the first year.

Museum staff noticed visitors to the new building seemed different than visitors to the uptown building. For example, a **diversity** of languages spoken in the elevators.

The Museum began to raise questions about how it could maintain its core principles while pursuing a **digital strategy** that built upon its initial successes. The Whitney began to think deeply about its **people strategy**. Employees were finding the resulting expansion at times overwhelming.

The Whitney's program **raised questions** about what it means to be the defining museum of 20th- and 21st-century American art—and what responsibility the Museum might have in the rapidly changing context of the United States

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YOUR ASSIGNMENT

Critical issues

3-5 Strategic goals and objectives

3-5 Risks

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REPORT BACK

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THANK YOU

THE MANUAL OF STRATEGIC PLANNING FOR CULTURAL ORGANIZATIONS
A Guide for Museums, Performing Arts, Science Centers, Public Gardens, Heritage Sites, Libraries, Archives and Zoos

BY GAIL DEXTER LORD AND KATE MARKERT

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