

THE FOUR W's *of* STRATEGIC PLANNING

Find the answers to the basic questions regarding the strategic planning framework.

WHAT

WHY

WHEN

WHO



WHAT IS STRATEGIC PLANNING?



Strategic planning is a process undertaken by companies to **assess their overall situation**, particularly in comparison to their competition, or even in order to compare to their own past performance.

This process can include examining their position in the marketplace, discussing options for long-term goals, and determining a course of action.

Planning helps determine the optimal future for an organization, as well as the changes required to achieve the desired outcome. It is also an important opportunity to engage stakeholders at all levels as agents of their own future.

WHY CONDUCT A STRATEGIC PLAN?

Cultural institutions can benefit from strategic planning, and generally conduct strategic plans for any – or all – of the following reasons:



**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
FRAMEWORKS**

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.

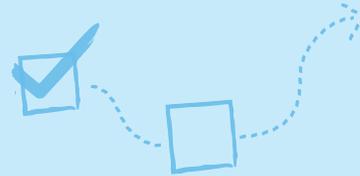


**TO ADDRESS
FORCES OF CHANGE
IN THE ENVIRONMENT,**

both internal and external.

WHEN TO CONDUCT A STRATEGIC PLAN?

An organization can and should start strategic planning under a variety of circumstances:



**PROFESSIONAL
STANDARDS**



NEW DIRECTOR



**NEW OR CHANGED
CIRCUMSTANCES**

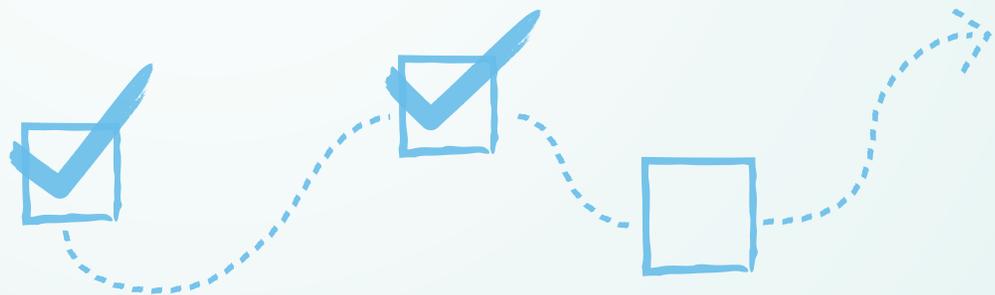


**NEW AND RENEWED
FACILITIES AND
NEW LOCATIONS**

WHEN TO CONDUCT A STRATEGIC PLAN?

PROFESSIONAL STANDARDS

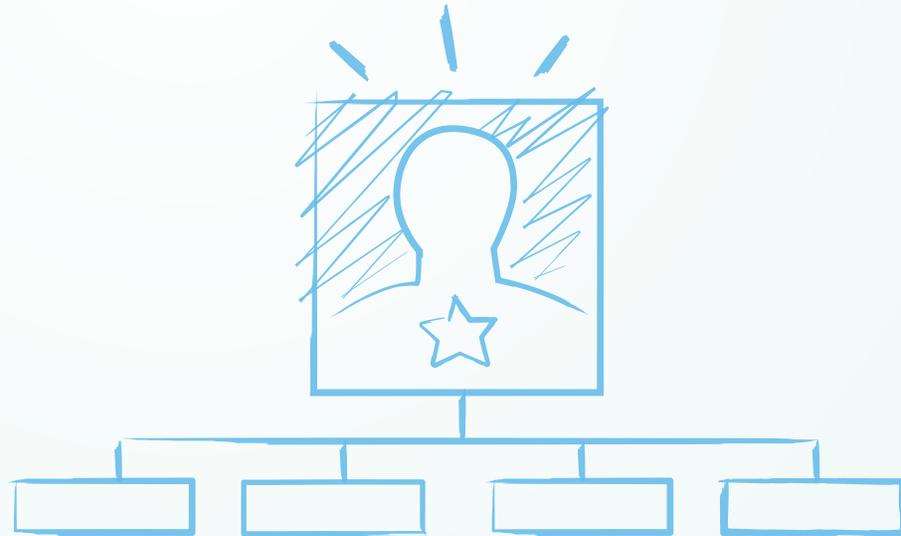
Across the cultural sector, an up-to-date plan is becoming a critical success factor. Strategic planning is also key to ensuring an organization is qualified to receive government and philanthropic funding – as well as appearing relevant to the general public. Strategic plans tend to cover a 4-5 year period, with reviews for expansion, revision and general performance occurring once a year, at minimum.



WHEN TO CONDUCT A STRATEGIC PLAN?

**NEW
DIRECTOR**

The arrival of a new director often becomes the moment to contemplate a new strategic plan. Once the new hire is in position, it is advisable to wait up to a year before initiating a new planning process, to provide time for the director to fully understand the organization, its resources, and its challenges.



WHEN TO CONDUCT A STRATEGIC PLAN?

NEW CIRCUMSTANCES

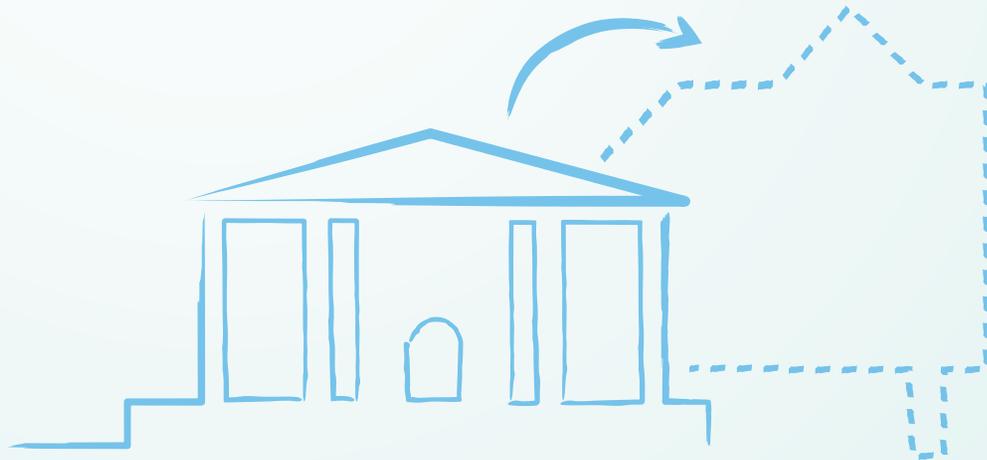
Sometimes economic and social conditions can change dramatically in a short period of time – for better or for worse. Ideally, an organization’s staff and board leadership will see opportunities and threats on the horizon, and plan for the desired change as part of the annual strategic plan update. In the event of dramatically changing circumstances, a review of current plans may be advisable.



WHEN TO CONDUCT A STRATEGIC PLAN?

NEW AND RENEWED FACILITIES AND NEW LOCATIONS

Starting with a new building or venue before strategic goals have been established can lead to later difficulties: the organization's scope and goals may not be consistent with the logistics of the space. The most logical and efficient sequence of institutional planning begins with laying out broad goals and direction for the organization. In the event of relocation or improvements, scope or goals can be aligned to best take advantage of the organization's assets.



WHO IS INVOLVED AND WHAT DO THEY DO?

Strategic Planning for cultural organizations is the joint responsibility of the board and staff.

It is an opportunity to bring the governing body and staff together to analyze the organization's position, resolve challenges, and to plan the future together.

Making the planning process productive and creative requires a clear structure with parameters and accountability. Parties involved in the process include:

LEADERSHIP

**STEERING
COMMITTEE**

STAFF

FACILITATORS

WHO IS INVOLVED AND WHAT DO THEY DO?

LEADERSHIP

The director and senior staff of an organization work with the steering committee. He, she, or they guide the overall direction of the organization during both the creation and implementing of plans. Staff members depend on leadership for clarity and the “big picture” so that goals can be set and executed successfully.



WHO IS INVOLVED AND WHAT DO THEY DO?

STEERING COMMITTEE

Appointed by the director and board leadership, the steering committee should comprise six to twelve people (including the director and board chair) with slightly more board than staff representation. The roles and responsibilities of the steering committee are as follows:

GUIDE

the consultants or staff charged with conducting the plan

ENGAGE

board and staff in the process, especially the strategic planning retreat, as appropriate

ASSESS

the effectiveness of the previous strategic plan and determine what should be different this time.

SIGN OFF

on all draft documents that go to the board for approval

FORMULATE & APPROVE

the strategic planning process

SUPPORT

management's effort to prepare the new strategic plan while including input from the board and staff (especially from the retreat).

RETAIN

the services of consultants if and as required

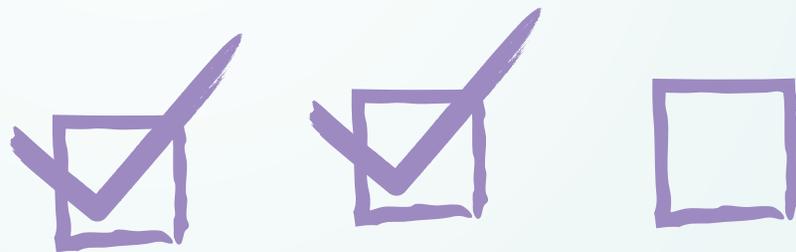
RECOMMEND

the plan to the board for approval

WHO IS INVOLVED AND WHAT DO THEY DO?

STAFF

It is the shared responsibility of staff and management to determine the best way to achieve organizational goals. Staff should analyze the current tasks and objectives in their departments to organize new tasks around the new strategic goals. Staff are also involved in implementing the strategic plan and its ongoing evaluation process in the organization.



WHO IS INVOLVED AND WHAT DO THEY DO?

FACILITATORS

LORD CULTURAL RESOURCES CAN HELP!

We can work with you to develop a plan to success. Contact us at info@lord.ca to know more.

Professional consultants are often retained to assist in preparing strategic plans because they can bring an outside point of view, facilitation skills, and a broad perspective on the organization and cultural trends. The key facilitation roles in strategic planning are:

PLANNING AND COORDINATING THE ENTIRE PROCESS

FACILITATING MEETINGS AND WORKSHOPS

MODERATING THE RETREAT

PREPARING BACKGROUND DOCUMENTS, RESEARCH, AND REPORTS

CONDUCTING CONFIDENTIAL INTERVIEWS

COACHING STAFF TO WRITE THE STRATEGIC PLAN DOCUMENT

MORE QUESTIONS?

Find the answers in *The Manual of Strategic Planning for Cultural Organizations* or contact us at info@lord.ca

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

The Manual of Strategic Planning for Cultural Organizations adopts a holistic approach to the creative world of cultural institutions. By encompassing museums, art galleries, gardens, zoos, science centers, historic sites, cultural centers, festivals, and performing arts, this book responds to the that boundaries are being blurred among institutional types—with many gardens incorporating exhibitions, many museums part of multidisciplinary cultural centers and festivals. As cultural leaders transform the arts in the twenty-first century, this “whole career” manual will prepare readers for every stage of the strategic planning process.



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