

FY 2017-18: PLANNING PROCESS

The Financial Committee along with the CEO and Board President spent most of May and June analyzing the budget, conducting an environmental scan of Happendance and outlining a procedure for the development of a Strategic Plan. What follows is a Draft Outline of the process.

FIRST STEPS: MAKE SURE YOUR ORGANIZATION IS READY

1. Ensuring Impact: Getting Ready for Success

- a. Clarity of Vision, Mission and Values
- b. Understand Vision
- c. Articulate Vision
- d. Share Vision and Mission with Others
- e. Act on Vision in Accordance with Core Values

2. Set Priorities for Organization: Goals from Retreat

- a. Preserve Diane Newman's high-quality teaching legacy by hiring highly qualified degreed teachers/faculty that produce college-ready dancers;
- b. Increase Student Output to 500 by the end of 40th Anniversary Year (2016-17);
- c. Increase Seasonal Customers by offering additional summer and holiday programs;
- d. Increase Event Audience by targeting families and our students' classmates;
- e. Increase Output to Improve Outcomes through Happendance Exchange programs.

3. Planning and Monitoring

- a. Regularly Assesse Programs
- b. Regularly Achieve Goals
- c. Modify/Change Goals when Needed
- d. Conduct Yearly Evaluation of Programs and Staff

4. Effective Leadership – Board of Directors and Executive Director

- a. Assure leadership has the experience and skills needed
- b. Executive Team works well together to effectively lead the organization
- c. Board Engagement is High: Time, Expertise, Support, Financial Contribution
- d. Board and Executive Leader Communicate Well

- e. Engage in effective Board recruitment and training
- f. Ensures Fiscal Oversight

5. Leaderful Organization

- a. Attract and Retains Competent Staff
- b. Develop Staff through Training
- c. Handles Conflicts Professionally
- d. Board and Staff Reflect Community it Serves

6. Effective External Communications

- a. Board, Executive Leader and Staff act as Ambassadors for Organization
- b. Effectively Promotes Organization
- c. Has a clear communication plan

7. Effective Fundraising and Planning for Sustainability

- a. Board, Executive Leader and Staff act as Ambassadors for Organization
- b. Organization has a well-developed fund development plan
- c. Executive Leader considers fundraising important
- d. Staff has skills necessary to raise sufficient funds
- e. Organization's budget reflect strategic priorities
- f. Organization has clear business model that promotes sustainability.

SECOND STEP: FINALIZE YOUR DECISIONS

1. Summarize strategic decisions and agree on core strategies
2. Draft Complete Strategic Plan
3. Conduct a thorough review process
4. Begin to prepare a document for public distribution
5. Reflect and Evaluate Regularly

THIRD STEP: PLAN CONTENT AND FORMAT

1. Introduction
2. Executive Summary
3. Mission, Vision and Values Statement
4. History and Current Context
5. Summary of Core Strategies
6. Goals and Objectives
7. Business Model
8. Organization Capacity
9. Discussion on Leadership of Organization
10. Appendices: Not necessary; most organizations just summarize the following:
 - a. Strengths
 - b. Weaknesses
 - c. Opportunities
 - d. Threats
 - e. Paraphrase Client/Customer Surveys

FOURTH STEP: SHARE THE PLAN

After the plan has been completely vetted and approved, it's time to share your Strategic Plan (at least an Executive Summary) with key partners, funders, and other individuals whose knowledge of the organization's future is key to their support. (Allison, M & Kaye, J. 2015)

REFERENCES: Allison, M. and Kaye, J. (2015). *Strategic Planning for Nonprofit Organizations: A practical Guide for Dynamic Times*. Hoboken: Wiley.

Saul, J. (2011). *The End of Fundraising: Raise More Money by Selling your Impact*. San Francisco: Jossey-Bass.