Keeping the Pace: The Value of an Actionable Strategic Plan

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Speakers

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About Hill-Stead Museum

Located in Farmington, Connecticut, Hill-Stead’s 33,000 square foot Colonial Revival mansion, situated on 152 acres, is one of the nation’s few remaining representations of early-20th-century Country Place Estates.

The museum’s collection of Impressionist paintings by Monet, Degas, Whistler, Manet and Cassatt, displayed in-situ with original furnishings and decorative art, attracts over 30,000 visitors each year. Educational programming in art, architecture, history, poetry and gardening is offered year-round to visitors of all ages.
Time for a New Plan
Forming a Strategic Planning Committee

• Seek diversity:
  - Age
  - Background
  - Familiarity with organization
  - Dedication to the organization
  - Strategic Planning experience

• Take into account that not everyone will be able to attend all meetings when determining the size of the committee.

• Partner with Executive Director on committee selection.
Selecting a Consultant

- Use resources from NEMA, your local Community Foundation, and your regional Arts or History Council.

- Ask peer organizations for consultant references.

- Committee should review and consolidate candidate list before distributing the RFP.

- Consider both large and boutique-sized consultants.

- RFP can be developed using sample formats for similar sized organizations.
Selecting a Consultant

- Request RFP from 4 - 6 consulting firms.

- Keep your planning committee involved in every aspect of the RFP process and have them review and comment on each proposal received.

- Committee with strong Executive Director input selects 3 - 5 consultants or on-site presentations.

- Committee meets to review results and make recommendations.

- Final selection needs full support of Executive Director and Strategic Planning Committee.
Securing Funding

• Build the cost of the project into your annual operating budget.

• Find an individual donor who can help.

• Apply for a Capacity Building Grant from your...
  - Local Community Foundation
  - State Humanities Council
  - Regional Arts Council

In Real Life:
Hill-Stead Museum received a $15,000 grant from CT Humanities to fund the cost of their consultant. The consultant had to be determined prior to applying for the grant, requiring significant committee efforts before work on the plan actually commenced.
Securing Funding

Capacity building is about strengthening management systems and governance in organizations. Capacity building does not include program development or expansion, or capital projects.

Projects that may be eligible for capacity-building grants include:

- Strategic planning
- Organizational assessment
- Board development
- Staff training
- Fund development planning
- External communications strategies
- Membership development
- Technology improvements
Engaging your Board and Staff

• Consider ½ to a full day of Strategic Brainstorming with Board.

• Use key Board members with professional expertise to assist in areas that will benefit from their background.

• The Board is to be a leader, a motivator and a catalyst for strategic success.

• The Board does not need to be involved in the minute details of strategic plan development and implementation.

• Staff and Board members bring complementary skill sets and perspectives. One without the other would result in a skewed and incomplete picture.
Engaging your Board and Staff

• The Strategic Planning Committee should report on progress at each Board Meeting.

• Once finalized, the plan and timelines for completion should be reviewed at every Board meeting.

• The Board should govern and lead the strategic plan, not create or manage it. This often gets lost in *misunderstanding*, *miscommunication*, *misapplication* and *missed opportunities*.

• This is not an exercise. Make it real.
Engaging Stakeholders

• Interview individuals and/or organizations to gather and interpret their level of engagement, opinions, perceptions and the perceived actions necessary to achieve future goals.

• Conduct an electronic engagement opinion survey of all Board members/key stakeholders, assessing perceptions, engagement and expectations.

• A trust between the strategic planning team (staff, volunteers, board members, committee and consultant) is necessary because...you will be out of your comfort zone...and you have to be.

• Conduct a benchmarking study of peer organizations in your home state/region, and beyond.
Engaging Stakeholders

• Conduct 2 – 5 focus group sessions.

• Conduct an internal development and branding operations audit.

• Review the efficiency and effectiveness of internal and external programs.

• Review and assess policies and procedures, roles and responsibilities.

In Real Life:
Hill-Stead Museum held three focus group sessions:
1) Volunteers  2) Residents/Neighbors  3) Members/Donors
Reviewing or Establishing your Mission, Vision and Organizational Values

• The fundamental purpose of strategic planning is to align the organization’s mission with its vision.

• The mission is the starting point for planning, the vision is the destination, and the strategic plan is the roadmap that helps you navigate.

• A strategic plan cannot succeed unless it is derived from a clear vision of what the organization will look like at a specific point in the future.

• Without mission and vision, the plan exists in a vacuum.
Reviewing or Establishing your Mission, Vision and Organizational Values

- Values are also important as they ground the organization to develop appropriate strategies and tactics.

- Strategies in opposition to values need to be reconsidered.

**In Real Life:**
Hill-Stead Museum revised its organizational values during the strategic planning process, but made the revision of its mission and vision an action item of its new strategic plan, to follow an interpretive assessment and subsequent interpretive plan.
Determining Attainable Goals for Success

- Set a realistic timeline to complete the plan.
- Set challenging but attainable goals.
- Involve staff to ensure buy-in and accountability.
- Understand that philanthropic growth can only happen if certain things take place – it is a long play.
- Create opportunities for members to move through the donor life cycle: Annual ➔ Major/Capital ➔ Planned Giving
- What will a future campaign bring? Capital projects, unrestricted giving, endowment?
Create and Utilize a Reasonable Timeline to Achieve Goals

• Create a calendar for all new projects, considering how they will be accomplished alongside day-to-day operations.

• Refer to your calendar at staff/departmental meetings. The entire team should be aware of how their tasks affect the full plan.

• Will additional staff be required to complete the work? If so, how will they be funded?

• The Board needs to take ownership by voting to approve the plan.
In Real Life:
Hill-Stead Museum created an oversized chart, used at Board meetings, to track the progress of its strategic plan. Action items are color coded:

Not yet started    In Progress    Complete
Publicize your Strategic Plan

- Create a “highlights” version with engaging images. Explain your planning process, revisions to mission and vision (if applicable), determined goals, and include a condensed timeline meant for the general public.
Publicize your Strategic Plan

- Share your plan at an annual meeting, or hold a celebratory presentation. Build excitement around your plan to help ensure it is a success.

- The “highlights” document should be easy to find on your website as a printable PDF.

- Mail or email your “highlights” to participating stakeholders, major donors, all grant funders, and state elected and appointed officials.

- Present the plan at one-on-one meetings with donors/funders, and disenfranchised members of the community.
Using your Strategic Plan for Philanthropic Success

Elements of a successful comprehensive development program:
Using your Strategic Plan for Philanthropic Success

- Philanthropy sets the stage for sustainability.

- What we learned: Optimal visitor experience /optimal donor experience
  - Human Interactions/ Customer Service
  - Participation of Family, Friends and Volunteers
  - Access to Information
  - Environments
  - Entertainment Value
Using your Strategic Plan for Philanthropic Success

- Philanthropy at Hill-Stead:
  - Why are these projects needed? Now?
  - How will funds be used?
  - What are benefits and consequences?
  - What is the connection to long-range plans and mission?

**In Real Life:**
Hill-Stead Museum’s strategic plan sets the stage for a joint capital and endowment campaign after the primary goals of sustainability and modernized interpretation are achieved. To help prepare the museum for a campaign, the creation of a fund development plan was set as the primary action item during the plan’s first year.
Learn from our Mistakes:  
Circumnavigating Hazards on your Strategic Planning Journey

From the Consultant:

• Assuming that the past is a reliable predictor of the future.

• The inability to craft a compelling, dynamic and meaningful vision.

• Manage plan details instead of engaging in critical strategic dialogue.

• Taking narrow, Board-centric approaches that do not involve a broad range of participants.

• The failure to see strategic planning as a long play, rather than as an end point.
Learn from our Mistakes:
Circumnavigating Hazards on your Strategic Planning Journey

From the Consultant:

• The failure to define precise targets, measure progress, and continually work to close strategic gaps.

• The inability to drive the strategic planning process, outcomes and responsibilities deeply into the organization.

• The inability to continuously turn new information into strategic knowledge, and transform it into strategic action.
Learn from our Mistakes:
Circumnavigating Hazards on your Strategic Planning Journey

From the Board President:

- What is the next step? How do you sustain the committee after the plan is complete?

- How often should the committee meet to monitor progress and make updates to the plan?
Learn from our Mistakes:
Circumnavigating Hazards on your Strategic Planning Journey

From the Executive Director:

• Be thoughtful about the composition of your committee – make sure it is balanced by skill set and personality type.

• Be sure to involve your staff in the process, not just at the end.

• Be prepared to set aside other projects. Research and meetings will take a significant amount of your time. Make strategic planning a priority.
Questions and Answers
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