

STRATEGIC PLANNING FOR CREATIVE SUCCESS

how creative organisations thrive in turbulent times

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TODAY'S STRUCTURE

- WHY PLAN – AND WHY NOT?
- HOW DO YOU PLAN - AND WHO SHOULD DO IT?
- IMPLEMENTATION
- WHAT IF IT GOES WRONG – PLANNING IN ADVERSITY

But First - Me

WHY PLAN

For your organisation, it helps

- Deliver The Mission
- Enable Great Art
- Establish realistic goals
- Communicate the organization
- Build organizational capacity
- Secure resources
- Create a brand

And for those outside, it

- Builds funders' confidence
- Facilitates partnerships
- Attracts exciting artists/collaborators
- Develops audiences

AND WHY NOT

- Strategic Planning is for big organisations
- We don't have capacity
- It's too theoretical - not real
- Formulaic and not appropriate to an artistic company

SP4CS: HCOTITT

**What does 'creative
success' look like?**

Strategic Planning

- Clarifies the overall purpose and desired results of an organization and how those results will be achieved
- There are different models
- There is not a perfect plan but you have to know the options
- The real benefit is the process not the plan
- In planning, things usually aren't as bad as you fear nor as good as you'd like

So – what's the plan, Stan ?

A plan for a cultural organisation is there to serve the art and audiences. It should be:

Art- centred and Market-focused

What it isn't

- An imposition on the organisation – by an outsider (or a CEO)
- A constraint that prescribes precisely how the company will work over the next N years
- A document on the shelf
- A stick to beat people with
- Immutable

Rather it should be

- Broadly owned and consulted on
- A directional compass
- A dynamic, living document
- A communications/advocacy tool
- Capable of changing to meet new circumstances and opportunities

How Do You Plan?

- Take the time it needs
- Involve the widest possible range of opinion
- Identify the organisational and financial resources required
- Be ambitious, but be real
- Be rigorous
- Be inclusive
- Prioritise
- Treat the plan as a framework, not a formula

What Should A Plan Cover?

- Where You Are
- Where You Want To Go
- How You Get From Here To There

Where You Are

Internal and External

- Market Analysis of the Operating Environment
- Organisational Analysis (e.g. SWOT)
- Stakeholder Analysis
- The organisation's present capacity

Where You Want To Go

Clearly linked vision, mission, values and objectives
A strategic direction for the organisation

- Specific
- Measurable
- Attainable
- Relevant
- Timely
- Evaluate-able
- Rewarding

How Do You Get From Here To There ?

- Financial Model
- Development Needs (human and other resources)
- Potential Strategic Alliances
- Risk analysis and management strategy
- Action plan – with named responsible people and time-lines
- Be prepared to contemplate new models

New Models

Derby Theatre Case Study

Who Plans

- A planning Team, including decision makers
- Those responsible for implementation
- People at the appropriate level
- Stakeholders involved

Implementing The Plan

- Distribute the draft plan
- Organize it into manageable chunks
- Involve people who will be responsible for implementation
- Cascade the strategic plan's headlines
- Specify roles and responsibilities
- Be clear about monitoring progress
- Be sure that one person has ultimate responsibility that
- The chief executive's support of the plan is a major driver

When it all goes wrong

Warning Signs – Financial

- New need for an overdraft or a higher limit
- Cash-flow challenges
- The Balance sheet test
- Delayed Management accounts
- Needing early grant payments
- Final reminders

And Operational

- Losing clients, projects or generally declining activity
- Losing key staff
- Losing Board members
- Inertia

A BASKET CASE

So How To Turn It Round?

- Careful organisational diagnostics
- Strategic planning of a high order is service of the vision
- Building up the organisation's leadership and decision making capacity
- Time for implementation
- A level of honesty – with yourself and others – to face the realities of the situation
- Remain open to learning

Characteristics of Successful not-for-profit turnaround

- Open management style prepared to ask questions
- Leadership with vision and energy
- Organisation that is open to learning
- Prepared to ask for help
- Good networkers
- Good support systems - home, work, self

Factors For Success

- Transparency – being open and honest about the nature and scale of the problems
- Partnership – working with others to be up front about the solutions
- Communication – internally and externally
- Not trying to second guess what stakeholders will & will not accept

Knowing What Success Will Look Like

- A shared vision, clearly expressed
- Buy in to the vision from stakeholders (artists, audiences, partners, peers, funders)
- An appropriate (perhaps new) delivery model