



Strategic Plan Summary 2016-2018

Completed by the Strategic Planning Team,
Board, and Staff

Presented: November 12, 2015

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2016 – 2018 Strategic Plan Executive Summary

Mission

To enrich our communities by sharing the transforming power of music and art, free to all.

Ten-Year Vision

Beaches Fine Arts Series (BFAS) is an integral part of the cultural and societal health of the Beaches community.

Our community is aware that its engagement with and ownership of BFAS enables the organization to offer music and art free of charge.

We conduct robust educational outreach in partnership with targeted schools to create more intensive and interactive experiences for youth.

Core Values

Music and art enrich lives, transcend societal boundaries, and should be accessible to all.

A sense of pride and ownership fosters excellence in all we do.

Valuing relationships builds community trust.

An inclusive culture attracts people with passion and commitment.

People working together for a common cause achieve great results.

Goals

Increase sustainable funding

Build brand awareness

Develop a Board aligned with the strategic direction

Expand passion and engagement within the Beaches community

STRATEGIC ISSUE	STRATEGIC ISSUE	STRATEGIC ISSUE
Funding <i>How do we cultivate and engage current and prospective donors?</i>	Organization awareness <i>How do we increase brand awareness?</i>	Sustainability of the organization <i>How do we set up a culture for sustainability?</i>
CORE STRATEGIES	CORE STRATEGIES	CORE STRATEGIES
1. Develop and implement a donor cultivation process 2. Develop and implement plan for targeting more corporate contribution	1. Develop an integrated, comprehensive marketing communications plan	1. Develop and implement an integrated volunteer management system

Enhance Board capacity (foundational to all key strategic issues)

Operational Plans

Operational plans will be developed that outline the next steps, responsible individuals, timeframe, and metrics for each of the strategic issue areas above. Operational Plans will be developed by working groups for the following strategies: Enhance Board capacity, Develop and implement a donor cultivation process (philanthropic mindset), Develop and implement plan for targeting more corporate contribution by the end of first quarter 2016.

Monitoring and Evaluating

A monitoring and evaluation plan will be developed. Frequency of updates, content of updates, and format of meetings will be designed around the implementation of this Plan. There is a nice combination of Board and staff participation and support. The Strategic Plan is a living document and is intended to be a roadmap for the next three years on an ongoing basis.

SITUATION ASSESSMENT

Strengths	Areas for Improvement
<ul style="list-style-type: none"> • Program: quality, variety, diverse, free • Outreach: innovative and interactive, award-winning, broad exposure to those that may otherwise get it, changing lives • Board and staff: hard working, passionate, committed, quality • Organizational model: commitment to remain free for all, trust, relationships 	<ul style="list-style-type: none"> • Awareness: more awareness of who we are and what we do, marketing and social media improvements, community awareness • Ownership by key stakeholders: understanding that community engagement is critical to the organization's success, commitment by key stakeholders to support long-term sustainability • Fund development: lack of consistent, predictable, sufficient funding sources, stabilize and increase corporate and donor revenue sources, endowments, estate planning, our current major fundraisers are not producing a good return on effort • Board, staff, volunteer capacity: fear of burnout, need for additional staff and board, volunteer coordination and development, long-term staffing plan, governance structure
<p>Opportunities/Threats</p> <p>Demographic: shifts in demographics toward a younger audience; Beaches area is growing financially, population, culturally; aging population</p> <p>Economy: diminishing and uncertain grants, competing nonprofits of non-cultural type</p> <p>Social: dumbing down of society; consumer tastes have changed</p> <p>Local: new symphony conductor in our community</p>	

MISSION

To enrich our communities by sharing the transforming power of music and art, free to all.

TEN-YEAR VISION

Beaches Fine Arts Series (BFAS) is an integral part of the cultural and societal health of the Beaches community.

Our community is aware that its engagement with and ownership of BFAS enables the organization to offer music and art free of charge.

We conduct robust educational outreach in partnership with targeted schools to create more intensive and interactive experiences for youth.

VALUES

Music and art enrich lives, transcend societal boundaries, and should be accessible to all.

A sense of pride and ownership fosters excellence in all we do.

Valuing relationships builds community trust.

An inclusive culture attracts people with passion and commitment.

People working together for a common cause achieve great results.

PRIMARY TARGET AUDIENCE

Beaches community broadly defined as Southside Boulevard east includes Jacksonville Beach and Ponte Vedra Beach

KEY STRATEGIC ISSUES*

Funding

How do we cultivate and engage current and prospective donors?

Organization awareness

How do we increase brand awareness?

Sustainability of the organization

How do we set up a culture for sustainability?

* Note: Not in Priority Order

GOALS*

Goal 1: Increase sustainable funding

Goal 2: Build brand awareness

Goal 3: Develop a Board aligned with the strategic direction

Goal 4: Expand passion and engagement within the Beaches community

* Note: Not in priority order

CORE STRATEGIES

Funding

How do we cultivate and engage current and prospective donors?

1. Develop and implement a donor cultivation process (philanthropic mindset)
 - Identify current and prospective donors (including the corporate audience)
 - Segment donors
 - Determine levels
 - Process for matching interests and needs with structural piece
 - Process for recognizing and thanking
2. Develop and implement plan for targeting more corporate contribution

Organization awareness

How do we increase brand awareness?

1. Develop an integrated, comprehensive marketing communications plan

Sustainability of the organization

How do we set up a culture for sustainability?

1. Develop and implement an integrated volunteer management system

Across all three key strategic issues

1. Enhance Board capacity
 - Diverse composition
 - Education around fund development
 - Clarify roles and responsibilities
 - Be specific with tasks/assignments

MAKING THE CULTURE SHIFT TO SUSTAINABILITY

Making the Culture Shift

Current State:



Future State:

Ad hoc volunteer management

Organized volunteer system

Consumers

Audience ownership

Individual funders

Increase reach to Corporate funders

Reactionary

Proactive

Hand to mouth

Financial stability

OPERATIONAL PLANS

Operational Plans will be developed for the following strategies:

- Enhance Board capacity
- Develop and implement a donor cultivation process (philanthropic mindset)
- Develop and implement plan for targeting more corporate contribution

BUDGET

Need to tie to Plan and insert

APPENDIX

A. Strategic Planning Team

Eleanor Ashby*

Deb Baker

Martha Baker

Dorreen Daly

Curtis Ford

Martha Gerding

Hannah Hoffman

Tracy Morris

Lynne Radcliffe

Lorraine Roettges

Kathy Wallis

Frank Watson

*Deceased

APPENDIX

B. Board and Staff

Tracy Morris, President

Dorreen Daly, Vice President

Susan Castelli, Secretary

Corky Borders, Treasurer

Debbie Baker

James Bonnette

John Elian

Curtis Ford

Elaine Hall

Kathy Henry

Cheri Hines

Judy Hinton

Hannah Hoffman

Shawn LeNoble

John Lumpkin

Marjorie Pardue

Penny Pfab

Lynne Radcliffe

Pablo Rivera

Julia Sedloff

Simon Shiao

Kathy Wallis, Executive Director

Martha Gerding, Dir. of Development

APPENDIX

C. Glossary of Planning Terms

Strategic/institutional planning – a systematic process to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why it does it.

Mission statement – a statement that defines the core purpose of the organization-why it exists.

Vision statement – a picture of the future the organization seeks to create, described in the present tense, as if it were happening now. A statement that shows where we want to go, and what it will look like when we get there.

Values statement – the principles or beliefs that guide an organization’s members as they pursue the organization’s purpose.

Environmental scanning – gathering up-to-date information about the organizations strengths and areas for improvement, and its external opportunities and threats. The assessment helps to refine and reshape the list of critical issues the organization is facing.

Major issues – after assessing the environment, identify primary concerns facing the organization.

Strategy – The means by which an organization intends to accomplish an objective or goals.

Core strategies – broad, overall priorities or direction adopted by an organization.

Goals – broad, expected outcome statements that define what an organization is trying to accomplish both programmatically and organizationally.

Objectives – precise, measurable, time-specific results that support the achievement of an objective.

C. Glossary of Planning Terms continued

Action plan – a plan for the day-to-day operation of a business over the next one to twelve months. It includes what activities need to happen, who is responsible for making sure they happen, by when, what additional resources are needed, and the expected outcomes.

Action plans translate the grand strategic objectives into a series of specific, bite-sized, doable actions with human and financial resources allocated to ensure success.

Stakeholder – any person, group, or organization that can place a claim on an organization’s attention, resources, or output, or is affected by that output.