

Strategic Planning in the Arts: A Practical Guide

Implementation Planning

The Rubber Meets the Road

Once an organization develops its implementation plan, a financial plan must be created. Financial plans are a series of projections that reveal the expected fiscal impact of pursuing organizational strategies in the manner described in the organization's implementation plan. While implementation plans answer the questions of what will be done, by whom and when, financial plans answer the questions, "At what expense?" and "Where and when will income be generated?"

An implementation plan represents the distillation of the entire strategic planning effort. Many plans lack a clear description of the way each strategy will be put into action. This leaves so many questions unanswered that it is unlikely that many, if any, of the strategies will be pursued. The implementation plan answers three central questions for each strategy:

1. What are the specific steps required to implement the strategy?
2. Who is responsible for implementing the strategy?
3. When will the strategy be implemented?

In a well-designed planning process, one begins to address implementation issues during the strategy development phase.

While creating a realistic implementation plan must be approached with great care, no "surprises" should emerge in the process. Certainly not every strategy can, or should, be implemented immediately. Yet if one or several strategies cannot be implemented at all, owing to a lack of funds, expertise or time, errors were made in developing the external analysis, internal analysis or strategies.

There are two central elements in an implementation plan: a list of short-term priorities and a complete discussion of the proposed action steps.

The first task in completing an implementation plan is to identify the key strategies that must be pursued in the very near-term. This list will include the most urgent strategies, those that will set the stage for future strategy implementation or will allow the organization to survive. Since many arts organizations only approach planning in a serious way when they are in deep financial trouble, the short-term implementation plan frequently addresses approaches to finding cash immediately. It is important to note that the strategies selected for immediate implementation are not necessarily those that are the most important in the long-term. If the organization cannot survive the short-term, however, the long-term strategies have little meaning.

This short-term priorities list must be developed by consensus. The entire staff and Board must agree to the items on this list since most will be called upon to accomplish them. In short, this list represents the organization's work plan for the next six-to-twelve months.

The second element of the implementation plan is a report that details the steps required to pursue each strategy as well as the personnel responsible and expected completion date for each step. Each strategy in the short-term priorities list as well as all other strategies mentioned in the plan are included in this report.

Not every strategy can be pursued at the same time. Scarce personnel and financial resources limit the number of strategies that can be addressed at any one time. In addition, some can only be pursued after others have been implemented. For example, a capital campaign will be far more effective after the implementation of a serious marketing effort. An effort to build a high-level individual donor base must typically follow the strengthening of the Board so that sufficient prospects for this donor base can be identified.

Therefore, it is important to schedule each strategy in relation to the others and with consideration for the total resources available for strategic initiatives. Ideally, implementation plans are developed by the administrative leaders since they tend to have the best idea of the human and financial resources available and the other obligations of the organization.

It is helpful to schedule the major strategies first. For example, if the five major strategies for a small opera company are:

- Hiring a new Executive Director
- Developing high-impact community-based cultural projects
- Bringing fund-raising activities in-house
- Enhancing marketing and public relations activities
- Involving new Board members in fund-raising activities

Then the first-level implementation plan might include:

	<u>FY95</u>	<u>FY96</u>	<u>FY97</u>	<u>FY98</u>	<u>FY99</u>
A. Hire a New Executive Director	X				
B. Develop Community Projects	X	X			
C. Bring Fundraising In-House	X				
D. Initiate Marketing/PR Program	X	X			
E. Engage New Board Members	Ongoing----->				

After the basic strategies have been arrayed, the operating steps required for pursuing each strategy can be developed. This list should be detailed enough to provide adequate direction to the implementers. If additional sub-steps are obvious, they need not be listed. For example, if an organization decides it must hire a new Executive Director it might create the following action steps:

	<u>FY95</u>	<u>FY96</u>	<u>FY97</u>	<u>FY98</u>	<u>FY99</u>
A. Hire a New Executive Director	X				
Develop Job Description	Jan				
Advertise Position	Jan				
Hold Preliminary Interviews	Jan				
Hold Final Interviews	Feb				
Introduce Finalist to Board/Staff	Feb				
Make Offer	Feb				

If another strategy is to develop the organization's community-based projects, the implementation steps might include:

	<u>FY95</u>	<u>FY96</u>	<u>FY97</u>	<u>FY98</u>	<u>FY99</u>
B. Develop Community Projects	X	X			
Define Project	May				
Identify Facility for Project	July				
Schedule Activities	Aug				
Notify Participants	Oct				
Conduct Program		Jan			

STRATEGY IMPLEMENTATION CHART**January - December Fiscal Year**

<u>PROGRAMS</u>	<u>STAFF</u>	<u>BOARD</u>	<u>FY95</u>	<u>FY96</u>	<u>FY87</u>	<u>FY98</u>	<u>FY99</u>
A. Hire a New Executive Director	AD	SC	X				
Develop Job Description		SC	Jan				
Advertise Position	MD		Jan				
Hold Preliminary Interviews	AD	SC	Jan				
Hold Final Interviews	AD	SC	Feb				
Introduce Finalist to Board/Staff		D	Feb				
Make Offer		Chair	Feb				
B. Develop Community Projects	AD/ED		X	X			
Define Project	AD		May				
Identify Facility for Project	ED		Jul				
Schedule Activities	ED		Aug				
Notify Participants	AD		Oct				
Conduct Program	AD			Jan			
C. Bring Fundraising In-House	ED		X				
Hire Development Associate	AD/ED		Apr				
Move Files to Home Office	DD		Apr				
Seek Multi-Year Support for GOS	DD/ED		Ongoing----->				
Establish Corporate Committee	DD/ED	D	Jun				
Research Support for Audience Development		D	Ongoing----->				
Seek Funds from State/Local Representatives	ED/DD	D	Ongoing----->				
D. Initiate Marketing/PR Program	ED/DD		X	X			
Communicate Leadership in All Materials	ED		Ongoing----->				
Create Board Marketing Committee	ED/MD	D	Sep				
Target "Special" Individual Donors	ED/MD	D	Ongoing----->				
Provide National Press with Information	ED/MD		Ongoing----->				
Develop Design for all Print Materials	MD	MC	Oct				
Create In-Theatre Marketing Program	ED/MD		May				
Enhance Gala Benefits	ED/AD/MD	D	Ongoing----->				
E. Engage New Board Members	ED/AD	D	Ongoing----->				
Create Nominating Committee	ED/AD	D	May				
Identify Events for Cultivating Trustees	ED/AD	D/NC	Ongoing----->				
Add Contributing Board Members	ED	NC	Ongoing----->				
Develop Board Support Materials	DD	NC	Jun				
Annual Board Retreat	ED	D	Ongoing----->				
Implement Orientation Process	ED/AD	NC/D	Jan				
Remove Uninvolved Board Members	ED	NC/D	Ongoing----->				

STAFF

AD Artistic Director
ED Executive Director
DD Development Director
MD Marketing Director

BOARD

D Directors
NC Nominating Committee
MC Marketing Committee
SC Search Committee

After the action steps have been developed, they can be scheduled as well. Please note that some strategies that may be fully implemented at a later date (e.g., mounting an additional production) may require some preparatory steps in the near-term (e.g., determining the subscribers' interest in an additional production).

The final element of the implementation plan is the assignment of responsibility for each operating step. The selection of the implementer will depend upon each candidate's expertise, availability and interest. An effort must be made to spread the implementation duties among the various staff departments and Board committees. If too many implementation steps are assigned to one person, it is unlikely that they will be pursued in a timely manner. If one staff member is assigned a disproportionate number of implementation steps this person is either not a good delegator or the remainder of the staff is not adequate, or both.

Frequently, readers of a detailed plan (including many Board members) will fear that the plan is too ambitious, attempting to accomplish too much too soon. A well-crafted implementation plan should allay this concern although many lay people would be astonished to learn how much each arts professional can accomplish with little support and fewer financial resources. In fact, a great deal must be accomplished, all at the same time. The links between marketing programs and fund-raising success, Board development and financial health, appropriate staffing and artistic quality, etc. are evident. No arts organization has the luxury of waiting for the implementation of any one strategy to be completed before the next is initiated. Arts administrators, like puppeteers, are challenged to handle many actions coincidentally, pulling the appropriate string at the strategic moment.