

Strategic Planning Made Simple

Welcome

While you wait for the call to start, please write in chat:

- your name and organization
- earliest memory of mission related nonprofit service -
 - What was the spark? Who inspired you?

Sponsored by: The Community Foundation for Greater New Haven

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Strategic Planning Overview

- **Mission –**
 - Key component for all nonprofits
 - Clarity is paramount
- **Vision –**
 - Big picture – The “why”
 - Engage all stakeholders
- **Strategy –**
 - The “what” to reach the vision
- **Tactics –**
 - The “how, who and when” of strategy

Strategic Planning Made Simple

- Strategic Planning Overview

- Mission
- Vision
- Strategy
- Tactics

- Strategic Planning Made Simple

- Vision – Newspaper cover story in 5 years
- Strategy – 5-6 headlines of companion articles
 - the “what”
- Tactics – 1-page prioritized action plan
 - the “how, who and when”

Headline

Headline

Headline

Cover Story

Headline

Headline

Headline



Strategic Planning Made Simple Process

- Phase 0 – Define participants, process and desired outcome with Executive Director/Board Chair, etc.
- Phase 1 – Understand strengths and challenges during brief online discussions of 3-4 Board/Staff.
- Phase 2 – In person offsite with Board and senior Staff to develop vision cover story and 5-6 headlines.
- Phase 3 – Follow-up online zoom calls to define tactics and create 1-page prioritized action plan
- Results:
 - Improve collaboration
 - Develop clarity and alignment on path forward
 - Create brief, practical, actionable roadmap

Bards and Beams Theater Company

- You all are Board and Staff members of a community theater company, Bards and Beams, that owns and operates a small local theater, primarily staging their own productions.
- B&B has been actively producing 3 plays/musicals a year for the past 20 years.
- In addition to the ED, there are 2 FT and 2 PT employees and a volunteer Board of 12 members.
- The ED and Board Chair have a long, mostly collaborative working relationship.
- 10 of the 12 Board members, the ED and the VP of Development will be participating in this process.

B&B Strengths

- Recent accomplishments
 - Capital improvements
 - Staff additions
 - Expanded outreach
- Mutual respect among Board and Staff
- Long history of local community support
- Common interest to complete capital improvements to the theater

B&B Challenges

- External pressures on theaters (reduced audience & funding, post COVID engagement)
- Limited people resources (volunteers, staff, Board and patrons)
- Financial resource decisions and future stewardship
- Timing and expense of capital improvements
- Need to expand fundraising efforts, possibly including legacy giving
- Improving governance/role clarity (committee structure, Board oversight, staff role clarity, etc.)

Bards and Beams
Theater Company
Today's Focus

- You have completed Phase 1 - identifying strengths and challenges.
- Today's primary focus will be experiencing a portion of phase 2 - in person offsite to develop vision cover story and start to develop 5-6 headline strategies.
- Have fun!

Cover Story

**B&B in new state-of-the-art theater,
has show heading to Broadway and
received \$1,000,000 bequest**

Bards and Beams
Headline Exercise

12

Actors

Exec
Director

Stage
Director

Members
Donors &
Sponsors

Board

Staff &
Crew

Audience

Former
Member

Strategic Planning Made Simple Process Additional Steps

If at offsite, would then:

1. Harvest themes from headline exercise
2. Introduce headlines with goal of 5-6 headlines
 - See example slide
3. Collect themes/headlines and put on board
4. Prioritize headlines with sticky note voting
5. Educate on different response types to change
6. Schedule Phase 3 follow-up “tactic” meetings
 - a. Develop how, who and when for big 5-6 headlines
 - b. See 1-page tactics summary example slide

B&B has budget surplus

FT Artistic Director hired at B&B

B&B in new state-of-the-art theater, has show heading to Broadway and received \$1,000,000 bequest

New fund at CFGNH to support B&B

B&B attracts audiences from all parts of CT

Industry award goes to B&B for new works

Bards and Beams Theater Company Headline Strategies - Tactics Summary

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<u>Description</u>	<u>Designers</u>	<u>Implementers</u>	<u>Priority</u>	<u>Date Reported</u>	<u>Date Begin</u>	<u>Date End</u>	<u>% Complete</u>	<u>Updates</u>
Better management of income and expenses	Sarah	Joan, Ralph and Gary	1	10/5/24	10/5/24	5/1/25		
Hire FT Artistic Director	John	John , Jack, Jill	2	10/5/24	10/5/24	1/31/25		
Expand audience	Sarah	Bill, Cindy, Kate	3	10/5/24	10/5/24	6/1/25		
Increase Fundraising efforts/Legacy Giving	Ed and Ralph	Cindy, Jill, Jack	4	10/5/24	10/5/24	9/30/25		
Gain industry recognition	Fred	Joan, Cindy Henry	5	10/5/24	10/5/24	6/1/25		

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Thank You

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