

## ***THE PLANNING PROFILE***

### **ARTS Action Research**

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#### ***Creating Your Planning/Organization Profile***

Change in the environment of each arts organization is a given. The most effective plans not only recognize and confront the change, but work with it hopefully to some advantage. What allows an organization to effectively address change is the continuity within that organization. By continuity, we mean the complex constants that:

- describes who we are as arts professionals and organizations and why our work has value and is important and meaningful;
- articulates our beliefs and vision and aligns us with those who share our values;
- distinguishes artistic and stylistic approaches and points of view from the vast array of other live and electronic possibilities;
- defines our intentions and desires to bring value to peoples lives and the community; and,
- maintains our connection and congruency with the world regardless of how convulsive the environment becomes.

The real continuity of leadership, values, process and behaviours is far from the illusion of continuity represented in institutional trappings, championed for so long by those external to the arts. Rather, the essence and strength of continuity for each arts organization resides in a number of key internal areas at the heart of each arts organization. Too often this vital information is summed up in a quick and easy mission statement. Unfortunately mission statements tend to be so generic that crossing out the name of one organization and writing in another makes little difference. Each arts entity is a complex, multi-dimensional organism, unique and distinct – it is critical that each arts organization understands and articulates these qualities internally and externally.

The principal tool for articulating this essential information is the *Planning/Organization Profile* which should be viewed by professional leadership and partners as **both a process and a product**. Perhaps its greatest value is in helping all within the organization to come to understanding and agreement about “who we are, why we exist, what we do, and how we do it.” Increasingly community leaders and funders look out at the expanding arts landscape, see a blur, and conclude that there are too many arts organizations. Only when each organization is clear and specific about its *why’s* and *what’s* can the great range of arts entities be understood and appreciated. Broadly speaking, we in the arts have to do a better job of communicating that a healthy arts ecology is defined by great diversity of mission, form, content, discipline, and size not by definitions that fit neatly into funding parameters

The Planning Profile should be viewed primarily as an internal document, a work in progress, an ongoing point of departure and return for planning and thinking about the organization's life, work and future. Elements of the Planning Profile may be extracted or excerpted for various external communications, but it should be developed and maintained primarily for the purpose of internal understanding and agreement.

## **Execution**

### *Process*

Just as every *Organizational Profile* is a unique reflection of the entity it represents, the process for creating the *Organizational Profile* will be unique in each organization. Before embarking on the process, each organization will need to first consider who are the appropriate participants for their entity. This group is referred to as the *Planning Core*. In every organization, the *Professional Leadership* (the individual or individuals who are at the artistic and administrative center of the organization) are not only by necessity involved in the *Planning Core*, they appropriately take the leadership of the process. In addition, the *Professional Leadership* should identify key staff, board or community members who are within their core communities and who are well positioned to support the planning process.

Once a *Planning Core* has been identified, this group will need to consider the approach to developing the *Organizational Profile* that reflects their way of working together. In some entities, one person writes the initial document and circulates it to others in the *Planning Core* for feedback and additions. In other cases, the *Planning Core* will undertake a series of meetings to discuss the content of the document before having one or more members write these ideas down. As important as what is stated is how the document is generated so take some time together to decide what approach works best for you.

### *Style*

In style, the *Organizational Profile* should be consistent with the character and approach of the *Professional Leadership*. Whether written in first person or third person, conversational or expository, concise or descriptive, humorous or aspirational, language should be natural to the entity and its leadership, not intended to impress or incorporate outside agendas (no grant speak, marketing lingo etc.). The length, layout and design of the document are all flexible to the needs of the *Planning Core*. In all cases, however, the document should be written as fully and clearly as possible.

## **Content**

An Organizational Profile consists of several sections: The Context, the Center, Range of Programs, Overarching Goals and Measures of Success.

### **1. A Statement of Context and Background.**

Each arts organization functions within a context of community, cultural, economic and social conditions that have impact. Each arts organization has a history that influences the present and future. This section describes the elements of the arts organization's

context and background that most significantly frame and affect its current work and position.

The context may provide a statement or belief about the role, value, and need of the particular art form, discipline or service (why theatre, contemporary dance, handicrafts, or service; what is the spectrum of contemporary art, etc.) Where does the organization fit within the context of its discipline? It is not enough to call an organization a dance company, service organization, visual arts gallery or theatre, because a single discipline encompasses many forms and aesthetics. For example, dance today ranges from performance art to movement theatre to ballet companies which include classical and contemporary repertory.

Today, the very role and function of the arts is being questioned and challenged. Increasingly, it isn't enough to simply justify the organization; the art or art form itself must also be justified. Increasingly as board members go to the community on behalf of the organization, they must be prepared to explain why the art form is important and needed.

***In this section describe the elements of your organization's context and background that most significantly frame and affect your current work and position.***

*Important elements*

*What is the community, cultural, economic and social conditions that have affected the foundation of your organization?*

*What is the essential history/background of your organization that people should know?*

## **2. Defining the Centre.**

For each arts organization a clearly understood, articulated and communicated *center* is essential for achieving internal understanding and agreement about who we are as an arts organization, what we do, why we do it, and why and how we make the choices and decisions we make. The organization's center is the point of reference, of orientation and origination for every impulse, action and reaction.

A number of critical components comprise an organization's center.

- a) *The Leadership.* In a professional arts organization, professional leadership must clearly and unquestionably be at the center, leading and defining the vision. As the spiritual center of the organization, the leader is responsible for articulating the vision, the values, creating the work and selecting the projects and programs. Arts organizations succeed because of the vision and energy of the person(s) at the center – therefore the artistic leader(s) must be clearly identified and described in any way which may help others better understand the work and activity of the organization.

***Identify and describe the leadership of your organization, their personal history and engagement in the work.***

b) *The Beliefs, Core Values and Philosophy* is the *why* of the organization. This describes our beliefs, *why* this work, the point of view, the place and importance the work, and the service provided to the community. These beliefs and values can also be thought of as a declaration of principles. It is the combination of the vision and beliefs that set the direction for the next evolution of the organization. Some beliefs may be affirmations of existing ideas; others may be new ideas. Today, the *why* is more important than ever before. As the needs of a community grow and resources shrink, clear articulation of "why we exist" is needed to distinguish our arts organization from a menu of other organizations and worthy choices. To say, "We do great art, and we deserve support," is insufficient.

***Articulate the unique beliefs, core values and philosophy of your organization and your work.***

c) *The Aesthetic/Curatorial, and/or Programmatic Framework*, is the context through which choices about what art and/or programs are produced. Given the extraordinary range of aesthetic possibilities within any art form, the aesthetic framework is why a given artist(s) or director makes the choices he or she is which artistic and programmatic decisions are made, influences and filters makes.

***Describe the aesthetic/curatorial and/or programmatic framework of your work or programs.***

d) *The Working Values* define the culture of the organization. Every successful organization is unique in its values and culture based upon its commitments and beliefs, standards of work and behaviour, internal working chemistry, ways of treating each other, and ways of relating to the community. More than anything, the working values define the culture of the organization. The vision is extended and amplified through the working values of the organization.

***Define the working values of your organization***

**3. Range of Programs.** Each arts organization has a range of programs, services and activities that primarily serve and support the center. In this section of the profile these programs, services and activities should be listed and may include particular audiences served by each if appropriate. Include not only artistic programming and activities but other areas of activity that you undertake to support your artistic work such as managing a venue, providing training programs, hosting fundraising events, engaging interns etc.

***List and describe the programs, services and activities of the organization and the clients served.***

**4. Overarching Goals.** In this section we ask the leadership to describe what their overarching ambitions are for the work and the organization. What kind of impact is desired – how does the leadership want to have an impact on the art form, on audiences, on the artists, on the community? This section must be described in qualitative terms and not quantified according to time or other measures. This is not about your specific (and often more measurable goals) for this year or next year but what your organization seeks to achieve overall – i.e. what is the change(s) you want to make in the world?

**5. Measures of Success.** In this section the leadership needs to describe the criteria by which they measure the success of the organization's working processes, products, relationships and impact. This section should similarly be described in qualitative terms because there is no objective, measurable way to quantify the effectiveness of a working process or relationships.

In a society where success is measured by growth and numbers, it is critical for an organization to define itself qualitatively. A healthy balance sheet and other quantitative measures are important. However, our business is about values, aesthetics, process, and service--we must use appropriate subjective criteria to describe our success.

In the development of the not-for-profit arts, growth has been the primary, if not the only measure of success. In today's volatile and unpredictable resource environment, growth for growth's sake may be more of a negative measure. This does not mean there cannot be growth, but it must be carefully planned, controlled, and perhaps even defined in different ways. Growth may mean enriching and deepening what the organization is currently doing and the ways that the activity serves artists and the community.

Describe the indicators you will look for in terms of responses to the work and the organization, development of the work itself, relationships within and outside the organization and infrastructure or system changes that will help you to measure your progress.

***Important elements***

***Measures of success are aligned with the bigger ideas in the Overarching Goals. The measures need to be expressed in your own units of measurement for success.***

***How do you define the success of the organization?***

***What criteria (both qualitative and quantitative) do you use to measure the success of the organization's working processes, products, relationships and impact?***