



Creative Management Project



GOOD PRACTICES STORIES

Always on Focus: Planning as a Management Tool

Strategic plans, operational plans and other planning tools assist organizations to affirm and revitalize their mandate and envision their future while keeping on track with their day-to-day activities. For some organizations, the greatest learnings have been in the planning process itself, while others benefit from plans to enhance and support ongoing management and administration.

The **Textile Museum of Canada** in Toronto underwent a strategic planning process last year. As in many strategic planning exercises, staff and volunteers identified a vision (that “The Textile Museum of Canada promotes an understanding of human identity through textiles”), a mission, and values. In addition, the strategic plan examined how the staff and volunteers want to work with each other and with the public (see attached), using this component of the plan to articulate and affirm best practices in working relationships. The plan also identifies “centres of activity” – collection, exhibitions, education, revenue development, human resources, finance and administration, and the physical plant – employing the planning process itself as the vehicle to consider and describe the elements of each centre of activity, including priorities, objectives, tactics, resources, timeline, and success measures. Nataley Nagy, the Executive Director of the Textile Museum, treats the strategic plan as one of the tools that “provide a framework in which professionals work in an overall team approach.”

In its strategic planning, the **Arts Club Theatre Company** in Vancouver documented the planning process itself, paying close attention to the key questions that would examine problems and support strategic decision-making (see attached). The staff at the **Langley Centennial Museum** in British Columbia “went into longer range collaborative planning reluctantly due to the time it takes, but we now see it as the heartbeat of the museum,” according to Sue Morhun, Manager. The annual planning retreats, which take place during three non-consecutive days in the June-July period, create an opportunity to look at “where we want to go, and when and what we need to achieve our plans,” and the impact of that vision on all aspects of the museum. The outcomes of the retreat also drive the annual budgeting process and the development of individual staff workplans. Rose Bellosillo at **Hot Docs** film festival in Toronto, notes that “our planning has been transformational, and our strong vision, clear mandate and clear goals have helped propel us into achieving those goals.”

Some managers use strategic plans as a tool in day-to-day management of their organizations. At the **Arts Club Theatre Company** in Vancouver, the agenda of all management meetings includes reference to the strategic plan. According to Howard Jang, General Manager, “our mantra is ‘structure follows strategy,’ so we look at how we are doing against the plan, including benchmarks and timing.” Weekly meetings consider the cost of strategic priorities, and what activities or events may change the plan. The **London Regional Children’s Museum** in southwestern Ontario has completed a second three-year strategic plan, from which it has

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developed annual operational plans. In addition, the five key strategic intents of the strategic plan “drive Board, staff and committee meetings,” says Tammy Adkin, Executive Director. “This avoids spending too much Board time on finances and basic operations, and we are always on focus.” (A copy of the museum’s current strategic intents, and how they are used to frame meeting agendas is attached.)

Simon Brault, Director General at the **National Theatre School of Canada** in Montreal, employs the strategic plan and other reporting requirements as tools to “take advantage of those opportunities to come back to mission, vision and relevance for ourselves and society in general.” This inspirational approach to engaging staff, volunteers, funders and the public can be found in its annual reports (for one example, see the attached excerpt from a “Message from the Director General”). For Simon Brault, “the most important part of my work is to ensure that people are mobilized and feel empowered toward the mission of the organization.” His advice: “For anything that you do, you need to have a long-term vision, you need time, and you need commitment.”

Resources:

Good introductory materials on strategic and organizational planning include:

- The Voluntary Sector Knowledge Network, a demonstration project of the University of Victoria’s School of Public Administration, which provides an annotated list of web links on *The Strategic Planning Process* (see: www.vskn.ca/lead/str_prepr.htm).
- The Ontario Ministry of Agriculture and Food offers a factsheet entitled *Strategic Planning ... Is It For You?* that is targeted at non-profit organizations in general (see: www.gov.on.ca/OMAFRA/english/rural/facts/93-041.htm).
- The University of Waterloo Cultural Management Institute provides an excellent overview of organizational planning, including templates and samples, in “Business Planning for Cultural Organizations” (at: http://ccm.uwaterloo.ca/cpdp/ilms/bzp/bzpl_home1.html).
- The Human Resources in the Voluntary Sector project has prepared an *HR Planning Guide for Small Voluntary Sector Organizations*, which emphasizes the need for strategic planning and makes the links between strategic management and strategic HR planning (see: www.hrvs-rhsbc.ca/assessment_planning/pg001_e.cfm).

Some of the organizations profiled here have agreed to share some of their planning documents (attached are: the Arts Club Theatre Company’s process for developing their strategic plan; the Textile Museum of Canada’s good practices in work relationships; the strategic intents of the London Regional Children’s Museum, and how they are employed to focus meeting agendas [docs not yet received from LRCM]; and an excerpt from Simon Breault’s “Message” in the National Theatre School’s 2002-2003 annual report). In addition, the Canadian Conference of the Art’s most recent strategic plan can be found at: www.ccarts.ca/eng/04res/strategicplan.html.

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