

Arts Management Guidelines

Twenty Rules for Planning

1. Planning is more a state of mind than a fancy document or a lengthy process.
2. The best planners and strategists do it so naturally it appears intuitive. But in fact, they are working through a logical framework in their heads.
3. A well crafted planning process can result in a strong plan in a short amount of time if the resources needed are committed and the leadership is strong.
4. Make sure someone who has planning experience guides the process. This can be a staff member, a board member, an outside volunteer or a paid consultant
5. Make sure your planning committee includes board, staff and artists. Everyone should feel enfranchised.
6. However, the planning process is not a democratic one. The goal of the plan is to present the best possible option for achieving the organization's mission, not writing a bland statement that appeases everyone. Do not expect a committee to write the plan – make sure the planning leader is willing to write drafts of each section; the committee should give input to each draft
7. The best plans are comprehensive and integrated; simply adding up a series of everyone's favorite strategies rarely results in success. Planning is about scarce resources. One must be willing to make difficult choices.
8. A framework for planning makes the process so much more efficient and results in a better plan. If you simply gather a group and ask them to plan you will accomplish little in a long period of time.
9. The plan must be motivated by a strong directional mission. The mission helps ensure that everyone is working in the same direction and provides the only means of measuring success. A plan without a mission is meaningless
10. A mission without a strategy, however, is a wish. A plan has to be more than series of goals. It has to be specific.
11. What makes a plan a *strategic* plan is an explicit acknowledgement of the importance of the environment. What is happening around you and how does that determine the keys to success in your 'industry.'

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12. Use your industry association, media, outside experts, internet research, etc. to obtain information about the environment in which you operate. Don't guess or accept conventional wisdom.
13. If the analysis of the environment tells you the keys to success, an objective review of your strengths and weaknesses -- an internal analysis -- will tell you if you possess those success factors or not.
14. It is imperative that the internal analysis is based on an objective view of your organization. It is not helpful to be too self-congratulatory nor too self-deprecating. Planning is about honesty.
15. One can compare ones own organization to other peer companies to understand your true strengths and weaknesses. Interviews with objective outsiders can also be instructive.
16. The strategies should result from the internal and environmental analyses. If your organization does not have what it takes to be successful, which strategies will help you overcome this? If you do have what it takes to be successful, how do you protect and exploit these strengths?
17. The strategies must be supported by an operating plan that indicates who will be responsible for achieving each strategy and in which time frame.
18. A financial plan must indicate that the projected strategies are affordable. If not, then a review of the strategic and operating plans is essential.
19. The finished plan can be an important tool for communicating to funders, potential board members, staff, Board and the press. Experienced funders will appreciate thorough and honest analyses.
20. A planning process is only successful if participants understand the planning logic well enough to change the plan as the environment changes. If everyone in the organization learns to 'think strategically' the organization is certain to succeed.