



# EMBRACING THE EVOLUTION

*Chagrin Arts Plan for 2022–2024*



# EMBRACING THE EVOLUTION

## *Chagrin Arts Plan for 2022–2024*

### CONTENTS

I.	About the Organization	Page 3
II.	The Planning Process   Format and Findings	Page 4
III.	Chagrin Arts   Today and Into the Future	Page 7
IV.	Strategic Three-Year Goals and Objectives Framework	Page 9
V.	Income and Expense Projections	Page 13
VI.	Next Steps	Page 15

### MISSION STATEMENT

The mission of Chagrin Arts is to enrich life by presenting inspiring arts programming and stimulating conversations.

## I. ABOUT THE ORGANIZATION

*In 2007, Chagrin Foundation for Arts & Culture, located 25 miles east of Cleveland, was established to improve the quality of life and enhance economic stability in the Chagrin Falls area. To increase visibility, Chautauqua-in-Chagrin was established with the Chautauqua Institution of New York as a lecture series to bring internationally recognized speakers to Chagrin Falls during the summer season. Shortly after, a review of arts and cultural activities in the Eastern suburbs brought to light the lack of performing arts programs, other than community theatre. In 2008, a Performing Arts Series under the DBA of Chagrin Arts was created to engage and entertain audiences.*

*In 2014-15, programming evolved when Chagrin Arts became an independent member of the Chautauqua Trail. In addition, it increased its collaborative activities to co-sponsor free programs throughout the year, presenting speakers and performing artists in smaller settings and adding a family program and community Music Crawl to its Performing Arts Series.*

*In 2018, the longstanding Executive Director retired, and new leadership began in January 2019. Together with the Board, the new Executive Director reassessed Chagrin Arts' programming and developed a less segmented approach to strengthen the organization's identity and build audiences. That summer, Chagrin Arts produced a Shakespeare play in a neighboring community park. This is*



*now an annual event. In 2020, an Advisory Board was created to specifically address programming, marketing and messaging. The flexibility in the structure and the work of this group makes it more accessible. This energetic and passionate group of diverse members, from all walks of life in Northeast Ohio, brings a new voice, a broader reach, regional awareness, and new perspectives to the work of Chagrin Arts. Now, the Chairs of the Programming, Marketing and DEI/SJ (Diversity, Equity, Inclusion/Social Justice) Committees of the Board, form the PMM Group (Programming, Marketing, Messaging). Its strength is a vital link to the success of the organization's advocacy of diversity, equity, inclusion, and social justice issues through "Arts With a Purpose" programming. **(This background information provided by Chagrin Arts)***

Fast forward to today – in light of all of the changes within the organization and within the world - Chagrin Arts retained the services of Janus Small Associates to guide and facilitate the organization's leadership and stakeholders through a strategic planning process addressing Chagrin Arts' evolving future, specifically the period of 2022 – 2024.

## II. THE PLANNING PROCESS / Format and Findings

**FORMAT:** The Chagrin Arts strategic planning committee included members of the Chagrin Arts Board of Directors, Advisory Board, and staff:

- Joan Brown Campbell
- Beth Cohen
- Meghan Grover
- Patricia Haynish, Board President\*
- Linda Marabito
- Heather Pederson
- Karen Prasser, Executive Director
- Carol Roe
- Beth Rutkowski
- Julia Schonberg
- Marilyn Wise
- Sharena Zayed

*\* Patricia Haynish was the President of the Board through much of the strategic planning process; Beth Cohen and Beth Rutkowski became co-Presidents later in the process.*

There are many factors that determine just how in-depth any given strategic planning process should be, for example:

- *An organization's resources (time, money, people)*
- *Leadership shifts within an organization*
- *Level of satisfaction of those being served by an organization and those providing the service*
- *Significant shifts within the internal organization and/or external community (in this case, the impact of COVID-19 and significant racial justice efforts)*
- *External requirements (funding agencies, etc.)*

A planning process can be designed to be comprehensive and thorough, both on a variety of levels. Therefore, it is most important to develop a process with a scope matching the needs of an organization at a given point in time. With ongoing input from the strategic planning committee, the facilitator structured a planning process best suited to the current capacity and needs of Chagrin Arts. Following the facilitator's in-depth review of selected Chagrin Arts materials (Board meeting minutes, programmatic and budgetary materials, etc.), the planning process formally began with a confidential online survey to the Board of Directors and Advisory Board regarding mission, vision, strengths, weaknesses, opportunities, and challenges. Following this survey, a series of four strategic planning committee work sessions took place between June and September of 2021. Along with the Board and Advisory Board survey, to inform the work of the strategic planning committee, the consultant conducted interviews with community donors, partners, and funders; facilitated meetings with task forces dedicated to "People (Board, Advisory Board, Staff, Volunteers)" and "Money (Fundraising, Finance)"; and conducted a survey of donors and ticket holders.

### **FINDINGS: SWOC ANALYSIS (Strengths-Weaknesses-Opportunities-Challenges) INPUT**

The following SWOC was developed with input from the initial Board and Advisory Board survey and the planning committee.

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> <li>• Karen – her vision, leadership, optimism, connections. passion, talent, and drive.</li> <li>• New vision/new programming highlighting advocacy for social justice through our work.</li> <li>• New Board and Advisory Board members and the diversity and new ideas they bring us.</li> <li>• Committed, passionate Board and others involved with CA and the ideas and energy they bring.</li> <li>• Location of the office on Main Street with gallery and amid a great number of arts enthusiasts.</li> <li>• Broad community support. Its links to the community.</li> <li>• Its collaborative nature and strong networks.</li> <li>• The communities CA serves.</li> <li>• Willingness to bridge gaps.</li> <li>• Ability to stretch dollars.</li> <li>• Our strategic planning process led by Janus Small.</li> <li>• Chagrin Arts has a strong brand already.</li> </ul>	<ul style="list-style-type: none"> <li>• Limited financial resources: lack of sustainable funding, heavy reliance on donations/contributions and lack of strong enough fund development infrastructure.</li> <li>• Unclear direction and vision of the mission; up until now, no strategic plan. Sometimes it is unfocused/unorganized approach to events.</li> <li>• CA is not visible enough, lack of brand recognition.</li> <li>• Board needs to be stronger: not cohesive in direction re: moving forward, not enough leadership, creativity, and spirit within the Board. Board too small, too few people involved in decision making, many members not active/ active enough, limited committee involvement.</li> <li>• Not enough staffing. Too much responsibility on Executive Director.</li> <li>• Physical limitations (building space).</li> <li>• Low community participation and small base of audience support.</li> <li>• Lack of racial and cultural diversity in leadership and all roles.</li> <li>• Missing international links.</li> <li>• Accessibility to others outside of Chagrin.</li> </ul>
OPPORTUNITIES	CHALLENGES
<ul style="list-style-type: none"> <li>• Our new, unique mission: Seeding art with a purpose concept - creating programming that expands thinking around art and social justice work in Chagrin Falls and surrounding areas.</li> <li>• New funding that will open up to us to support this new work - large grants for the arts (NEA, etc.) to help with big funds for our big ideas!</li> <li>• Enhancing our outreach towards growing diversity.</li> <li>• Building new connections and community partnerships.</li> <li>• A great group of talented Board members and supporters and sharing decision making to include more voices and perspectives in leadership.</li> <li>• The ability to tap into renewed interest in the arts.</li> <li>• Involve younger audiences and people and groups already involved in social justice and in supporting artists.</li> <li>• The implementation of the Strategic Plan.</li> <li>• The use of the Family Life Center.</li> <li>• Having resources available to make things happen.</li> </ul>	<ul style="list-style-type: none"> <li>• Funding for the new mission and beginning to stay focused on the current or the new mission.</li> <li>• Maintaining support in local community; people not accepting the change in our mission/programs. Backlash from local community about the new mission; location in Chagrin Falls – “seen as elite and wealthy”, concern that our new direction will not be supported by local community.</li> <li>• Almost no brand recognition - Making CA visible, growing audience and supporters.</li> <li>• Navigating internal growing pains. Trying to do too much too soon Keeping up momentum.</li> <li>• Staff - need additional expertise in development and grant writing to find funding. Karen can do anything, but she needs a staff and funding to help us move forward.</li> <li>• Competition.</li> <li>• Being able to make use of the advisory board in ways that will stimulate them and involve them and excite them.</li> <li>• Board losing energy and not having committees be effective.</li> <li>• Access to other communities that cannot afford to come to the theater.</li> <li>• Uncertainty of audience comfort in attending live indoor performance.</li> </ul>

**BOARD AND ADVISORY BOARD INPUT:** On behalf of Chagrin Arts, Janus Small Associates developed and implemented an online survey to the Board of Directors and Advisory Board. Below please find the key themes that emerged from their responses.

**Money** – How do we develop Chagrin Arts’ funding to support the organization, especially the new mission and work such as *Blind Injustice*; have we developed new financial strategies; how do we work towards long-term sustainability especially with this new focus?

**Visibility and Audience** – Most respondents feel that Chagrin Arts has no or very little brand recognition and this must be addressed (for both increasing the enrichment offered by Chagrin Arts to participants and for purposes of fund development). How can we build visibility to build increased awareness of and community support for our mission and programs? How do we reach a younger audience? And are we clear on who is our target audience?

**Capacity** – How do we build our capacity to support our work – current work and growing work? How do we increase our staff, our Board committee effectiveness, advisory Board effectiveness, and Board fundraising mindset? In addition to Board and staff, do we have the infrastructure we need?

**Mission/Programmatic (or philosophical) Direction** – What does diversity, equity, inclusion, and social justice really mean to this group and how does it show up in everything we do/will be doing? If art and social justice is our commitment, what do we have to build, to do, or change moving forward? We’ve been somewhat scattered in our programming – will this new commitment help us be less so? And do we need to streamline our mission and goals to live this mission? And how does our new mission relate to our past, current, and future funding? Is “arts with a purpose” all that we will be doing and has the Board approved this?

**COMMUNITY INPUT:** As stated earlier, to complement and further inform the work completed at the planning sessions and in line with the strategic planning committee’s commitment to broad input, Janus Small Associates received thoughtful contributions to the process by over 115 additional people as follows. Janus Small Associates conducted numerous one-on-one community donor, partner, and funder interviews. Additionally, Janus Small Associates created, implemented, and analyzed a survey sent to Chagrin Arts’ database of donors and ticket buyers asking them about their perception, participation, interests, and ideas about Chagrin Arts.

### III. CHAGRIN ARTS / Today and Into the Future

The strategic planning committee participated in all-encompassing discussions informed by the input and themes emerging from community input via the surveys, interviews, and task force meetings. It became more and more evident that now is an especially exciting and important time of opportunity and formalizing evolution for Chagrin Arts for many reasons, especially:

- Chagrin Arts had added **new voices** to its leadership and planning team by developing the new Advisory Board. While adding these new voices presents a wonderful opportunity, now is the time to evolve and formalize the **overall governance and volunteer structures to best incorporate these voices** and insure coordinated input, efforts and action on behalf of the organization.
- After much thought during the strategic planning process, the Board approved **broadening the mission of the organization**, adjusting the mission statement wording to include "...presenting inspiring arts programming" (previously this phrase including the word "performances". This change will be activated through program planning moving forward. It is within the mission that the emphasis on "arts with a purpose" will live (see below).
- Just prior to the start of the strategic planning process, Chagrin Arts leadership embraced the concept of placing a special emphasis (rather than new mission) on **"arts with a purpose"** - in other words, arts as a tool for learning and social change. Per the strategic plan, during at least the next 36 months – the period of this strategic plan – this emphasis will continue and will be reviewed and evaluated annually) involving diverse artists, writers, producers, facilitators, technicians, production staff, teaching artists).
- Chagrin Arts must focus on **formalizing its fundraising infrastructure** (including the complementary area of marketing/messaging) to grow its budget to support expanding arts programming, and expanding audiences (size, make-up, and geography) and staffing support.



As explained above, during the planning process, the strategic planning committee reviewed and adjusted the Board approved Chagrin Arts' revised mission statement and, the strategic planning committee acknowledged the importance of formalizing all aspects of operations of the organization, both internal and external to support evolving and outstanding programming. To animate the mission statement and develop a roadmap to activate Chagrin Arts' commitment to building a strong foundation for the future, four goals were developed by the strategic planning committee as follows:

#### MISSION STATEMENT

The mission of Chagrin Arts is to enrich life by presenting inspiring arts programming and stimulating conversations.

<b>GOAL 1</b>	Develop and implement a plan to meaningfully activate Chagrin Arts' commitment to diversity, equity, inclusion, and justice (DEIJ) throughout all aspects of operations of the organization.
<b>GOAL 2</b>	Review and refine programs and services offered by Chagrin Arts with an eye to excellence, organization's capacity, and to maximize community benefit and enrichment.
<b>GOAL 3</b>	Strategically grow awareness of and understanding about Chagrin Arts and its mission, and programs and services.
<b>GOAL 4</b>	Strengthen the infrastructure of Chagrin Arts to support the growing work of the organization.

Related objectives – defined, operational, and specific – have been developed for each of the goals beginning on page 9. Action steps for each objective will be developed during the implementation process by the “implementation lead.” (See glossary below.)

**GLOSSARY:** (for use when reviewing pages 9-12)

**Goals** are broad expressions of what you want to achieve. They are expressed in general terms and will state the ultimate purpose of what is to be realized. Goals are what must be attained in total, or in some combination, in order to achieve some overall result.

**Objectives** are specific accomplishments that must be realized in order to achieve the goals in the plan. They are planned accomplishments, not planned activities.

**Action steps** are concrete, specific, and everyday actions necessary to meet the Objectives. Action steps will be incremental, realistic and easy to implement as part of the work plan. Action steps will be developed by the Implementation Lead for each Objective.

The person(s) and/or committee that is listed under the **Implementation Lead** column is accountable to move the assigned objective forward. Please note that others including staff members and/or expert contractors may be involved in the work as well.

**Timing:** This is a strategic plan framework covering the period from January 2022 through December 2024. Some Action Steps toward achieving certain objectives have already begun or will be accomplished prior to the official start date of this plan – during the last few months of calendar year 2021. Please note that addressing some of these Objectives will be started and completed in a matter of weeks or months while others will be on-going over a period of months or years. Implementation of Objectives labeled “Immediate” in the Timing column will commence no later than the period of January – March 2022.

## IV. STRATEGIC THREE-YEAR GOALS AND OBJECTIVES FRAMEWORK / 2022-2024



### EMBRACING THE EVOLUTION

*Chagrin Arts Plan for 2022–2024*

Goals and Objectives*	Implementation Lead*	Timing*
<p><b>GOAL 1:</b> Develop and implement a plan to meaningfully activate Chagrin Arts’ commitment to diversity, equity, inclusion, and justice (DEIJ) throughout all aspects of operations of the organization.</p>		
<p>1A. Form an ad-hoc task force made up of Board, Advisory Board, community volunteers and staff to guide development of the DEIJ action plan and provide oversight to the Board in the plan’s implementation and measures of success.</p>	<p>Executive Committee</p>	<p>Immediate</p>
<p>1B. Provide on-going DEIJ educational opportunities for Board, Advisory Board, staff, volunteers, and community members to learn together including but not limited to the role Chagrin Arts can play in dismantling systemic racism and effecting change.</p>	<p>DEIJ Task Force</p>	<p>Year One</p>

Goals and Objectives*	Implementation Lead*	Timing*
1C. Review all marketing and communications efforts and vendor selection efforts and adjust to best reach diverse audiences. (See Goal Three.)	DEIJ Task Force	Year One
1D. Review all personnel-related policies and procedures and revise as appropriate to reflect Chagrin Arts' commitment to DEI. (See Goal Four.)	Executive Committee	Year One
1E. Review all governance policies and procedures to strengthen the Board and Advisory Board overall and with an eye to diversifying the makeup of our Board of Directors and Advisory Board. (See Goal Four.)	Governance Committee	Year One
<b>GOAL 2:</b> Review and refine programs and services offered by Chagrin Arts with an eye to excellence, organization's capacity, and to maximize community benefit and enrichment.		
2A. Provide a wide variety of programming including but not limited to performances, visual arts, dialogue series, lecture series, and youth programs throughout Chagrin Falls and other venues throughout the Chagrin Valley and the Greater Cleveland area and in line with the organization's capacity (to plan, market and implement well) and commitment to diversity, equity, inclusion, and justice involving diverse artists, writers, producers, facilitators, technicians, production staff, teaching artists. (Note that a special emphasis will be placed on "arts with a purpose" during at least the next 36 months – the period of this strategic plan - to be reviewed and evaluated annually.)	Programming/ Marketing Committee	Year One
2B. Serve as a catalyst in bringing diversity to Chagrin Falls by making people from all backgrounds feel welcome at Chagrin Arts' programs. (See Goal One.)	Programming/ Marketing Committee and Communication/ Messaging Task Force	Year One

Goals and Objectives*	Implementation Lead*	Timing*
2C. Establish partnerships and build relationships with organizations to help further the mission including but not limited to those related to the social change we wish to see in the community and beyond and clarify and deepen partnerships with other Chagrin Falls/Chagrin Valley arts and culture organizations.	Ad-hoc Partnerships Task Force	Year One
<b>GOAL 3:</b> Strategically grow awareness of and understanding about Chagrin Arts and its mission, and programs and services.		
3A. Form an ad-hoc task force made up of Board, Advisory Board, expert community volunteers and staff to guide development a special communications and messaging initiative.	Executive Committee	Immediate
3B. Determine who Chagrin Arts' target audiences are, both geography and other demographics.	Communications/Messaging Task Force	Immediate
3C. Determine what message(s) Chagrin Arts wants to deliver to each target audience about the organization overall (public relations) and program-specific information (publicity).	Communications/Messaging Task Force	Immediate
3D. Develop tools and timelines to share messages (print, social media, partnerships, etc.).	Communications/Messaging Task Force	Year One
3E. Clarify Chagrin Arts' working relationship to other groups in Chagrin Falls to communicate this clearly to the public and Chagrin Arts' stakeholders as appropriate. (See Objective 2C.)	Ad hoc Partnerships	Year One

Goals and Objectives*	Implementation Lead*	Timing*
<b>GOAL 4:</b> Strengthen the infrastructure of Chagrin Arts to support the growing work of the organization.		
4A. Develop a staff structure that provides both the capacity necessary to implement this plan and fits within Chagrin Arts' fundraising capacity	Executive Director	Year Two
4B. Formalize the volunteer/intern structure to align with staff capacity and support the work of the organization.	Executive Director	Year Two
4C. Develop the Board of Directors make-up and operations with a focus on active Board committees with clear job descriptions made up of a diverse group of committed Board members, Advisory Board members and other volunteers.	Governance Committee	Year One
4D. Develop the make-up and function of the Advisory Board with clear roles and responsibilities as related to the governing Board of Directors.	Governance Committee	Year One
4E. Incrementally develop a larger budget and more diversified base of support, with emphasis on the cultivation of major individual donors as well as increased corporate and foundation support with increasing Board partnership with the staff.	Fund Development and Finance Committees	Year One
4F. Develop annual planning process incorporating programming, budget development, and fund development planning and including at least quarterly check-ins to maintain flexibility and review program evaluations.	Executive Committee	Immediate

## V. INCOME AND EXPENSE PROJECTIONS

Prior to COVID, the annual budget was approximately \$125,000. Using the last full year prior to COVID as a starting point for planning (shown below as 2018-19), the strategic planning committee along with the Board's Finance and Executive Committees did important research and gave significant thought to the necessary growth in the organization's budget to make this strategic plan reality – approximately 25% from the first year shown below to the 2021-22 year. Please note that this is not meant to be a specific budget; instead, this illustrates how income and expenses are likely to grow as presented below, by comparing the starting point year to the first full year of the strategic plan. Overall, both in 2021-22 and for the next few years, anticipated growth is primarily:

- *Regarding income*, projections show the greatest anticipated growth in dollars from individuals through intentional fundraising initiatives (including annual fund, special events, and more) and through government tied to new opportunities now available
- *Regarding expenses*, artistic and production costs and related staffing will likely grow – and continue to grow - the most percentage-wise over the next few years

<b>INCOME</b>	<b>2018-19</b>	<b>2021-22</b>	<b>Notes</b>
Foundation Grants	\$25,500	\$17,000	
Individuals Annual Fund/Other	\$45,000	\$25,000	Dollars from individuals are also included in Benefit income in 2021-22
Board Annual Fund contributions	\$9,800	\$15,000	
Benefit	\$4,000	\$28,800	Benefit income (Auction, raffle, tickets), benefit sponsorships/ads, benefit non-sponsor donations, benefit expenses
Government Support	\$17,000	\$39,000	OAC, CAC, NEA
Corporate Donations	\$6,000	\$5,000	
Earned Income	\$21,000	\$25,000	Gallery, Tickets, Misc. Income, Program Ads, Interest
<b>TOTAL INCOME</b>	<b>\$128,300</b>	<b>\$154,800</b>	

<b>EXPENSES</b>	<b>2018-19</b>	<b>2021-22</b>	<b>Notes</b>
Artistic	\$7,600	\$13,200	Artist/Speakers Fees
Production	\$5,700	\$10,300	Supplies and services, collaborative programs, hospitality, production equipment, production fees and travel, misc. and hall rental
Marketing/PR	\$10,000	\$12,600	Printing/promotional materials, advertising, promotional services, bulk mail services/postage, bulk mail postage, graphic design, misc. marketing
Salaries	\$65,800	\$78,000	Marketing, Development, Management, Programming
Management	\$32,200	\$38,650	Amortization, utilities, software, repairs/maintenance, depreciation expense, bank fees/service charges, hospitality, Board expenses, equipment, insurance, interest expense, internet/website/phone, postage, supplies, dues/subscriptions, statutory benefits, payroll service, contract labor, accounting/tax fees, professional development, misc.
<b>TOTAL EXPENSES</b>	<b>\$121,300</b>	<b>\$152,750</b>	

## VI. NEXT STEPS

Implementing the goals and objectives as presented as well as making reality the income and expense projections and growth will require great focus from the Board and staff. During the past year, Chagrin Arts has made important changes – staffing, Board, Advisory Board, mission focus, broader area of geographical service, and more. Remaining clearly focused on implementation of this plan will guide Chagrin Arts in “playing catch up” – building the infrastructure and outreach tools to formalize these changes, thereby truly embracing how the organization has evolved from its early years and through these past couple of years of great community change.

Stepping up to implement **EMBRACING THE EVOLUTION: Chagrin Arts Plan for 2022 – 2024** it is suggested that the first three immediate steps be: (1) Board leadership to populate committees as shown in the “implementation lead” column (of the framework for strategic goals and objectives document beginning on page 9) with Board members and other interested, expert volunteers; (2) each committee to develop specific and realistic action steps (with timetables and performance targets/benchmarks) to move each objective for which it is responsible forward; and (3) getting started!

