



# 2019 STRATEGIC PLAN

*for the period of*

October 1, 2019 — June 1, 2020

## **Contact Information**

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## **EXECUTIVE SUMMARY**

Superior Arts Youth Theater Board members, staff, and participants met on May 21, 2019 at 6:00pm to begin the strategic planning process. The meeting was facilitated by Chad Mager at Grow and Lead. During this session, attendees reviewed the SWOT Analysis and Goals from strategic planning sessions in 2017, created an updated SWOT Analysis, and established preliminary goals and needs based on that analysis.

Members of the Board and staff met on September 16, 2019 at 12:00pm to establish goals based on the updated SWOT Analysis.

### Short-term goals:

1. SAYT will expand the diversity and inclusion of audience and participants within our program.
2. SAYT will create stronger and more effective committees.
3. SAYT will improve marketing strategies.
4. SAYT will combat burnout amongst staff, volunteers, and youth supervisors.
5. SAYT will identify space issues and propose solutions.
6. SAYT will explore new ways to generate funds by creating an appropriate investment strategy.

### Long-term goals:

1. SAYT will invest in a permanent facility of its own to be used for storage, office/operational and rehearsal space.
2. SAYT will establish an endowment fund.

## **ORGANIZATION DESCRIPTION**

Superior Arts Youth Theater (SAYT) is a 501(c)3 tax-exempt organization in Marquette, MI that seeks to empower young people ages 3-18 through educational, performance, and technical theatre opportunities. Formally known as the Marquette Arts and Culture Center Youth Theatre (2001-2011) and Lake Superior Youth Theatre (2011-2015), SAYT became an independent organization in 2015. SAYT programming supplements the arts education provided in the Marquette Area Public Schools and surrounding districts by creating opportunities for kids of all ages — from preschool through high school — to perform in musicals and plays, join the crew backstage, and build new skills in camps and workshops.

A detailed timeline of our organization and production history can be found on our website:

<http://saytheater.org/history/>

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## **MISSION STATEMENT**

Through acting, music, dance, and other arts disciplines, SAYT seeks to provide young people ages 3-18 with high quality educational, performance, and technical theater opportunities.

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## **VISION STATEMENT**

We believe each child deserves access to education that nurtures theatrical talents and fosters an enthusiasm for the arts. We would like to create a financially sustainable program where a comprehensive range of theatre arts, made for and by youth, is accessible to every community in the Upper Peninsula. We envision a space where all youth feel welcomed, supported, and mentored, and where their voices and creativity are celebrated.

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## **VALUES STATEMENT**

\*\*\*(revise to ensure all goals and strategies are aligned with SAYT's Values)\*\*\*

*From first to last, theatre is a collaborative art.*

Inspire creativity.

Improve social, behavioral, and communication skills.

Foster community and youth leadership.

Promote quality, local arts opportunities.

Nurture theatrical skills and interest in the arts.

Discipline through artistic practice.

## **GOALS AND STRATEGIES — Short-term**

### **Goal #1 — SAYT will expand the diversity and inclusion of audience and participants within our program.**

#### *Specific Goals:*

- Educate staff and students on working with peoples of all ability, ethnicity, economic states, sexuality, and gender identity.
- Produce a touring production for communities underserved by the arts.
- Include sensory friendly performances of our main stage productions.

#### *Strategies:*

- Create policies and procedures for inclusive practices.
- Assign intern to contact schools in underserved counties to schedule performances.
- Logistics and funding for the traveling production.
- Choose and produce the traveling show.
- Secure funding for sensory friendly performance.
- Partner with Northern Michigan University and Autism Theatre Initiative for training.

*Deadline:* June 1, 2020

### **Goal #2 — SAYT will create stronger and more effective committees.**

#### *Specific Goals:*

- Develop committees with clearly defined goals to meet our organization's needs.
  - Marketing and PR
  - Fundraising
  - Volunteer/Parent Relations
  - Finance
  - Youth
  - Governance
  - Wellness and Behavior

#### *Strategies:*

- Create policies and guidelines for each committee.
- Recruit additional committee members
  - Announcement *Frozen Jr.* Parent Meeting
  - Email
  - Direct contact

*Deadline:* June 1, 2020

**Goal #3 — SAYT will improve marketing strategies.**

*Specific Goals:*

- Create Marketing Committee.
- Improve marketing strategies
  - Professional promotional photos and videos, production shots, head shots
  - Social media presence
  - Organizational brochures and posters
  - Season promotion poster/advertisement
- Create branded merchandise.

*Strategies:*

- Create policies and guidelines for the Marketing Committee.
- Secure funding to achieve marketing goals.
- Set aside specific dates to take promotional photos.
- Identify local businesses to create branded merchandise.

*Deadline:* December 1, 2019

**Goal #4 — SAYT will combat burnout amongst staff, volunteers, and youth supervisors.**

*Specific Goals:*

- Create Wellness and Behavior Committee.
- Identify causes of staff and volunteer burnout.
- Recognize problems that can be readily addressed.
- Create goals to improve staff and volunteer recruitment and retention.
- Compensate contractors with industry pay rates.
- Create paid intern positions for training in new contractual staff.

*Strategies:*

- Create policies and guidelines for the Wellness and Behavior Committee.
- Secure funding for increased pay for contract and intern positions.
- Research how other youth theaters handle supervision.
- Hire or recruit non-parents for supervision.
  - Girl Scouts?
  - NMU Students?
- Develop a consistent method to show volunteer appreciation.
  - Awards?
  - Event?
- Incentivize volunteers and supervisors (*check on whether this is legit*)

*Deadline:* January 1, 2020

**Goal #5 — SAYT will identify space issues and propose solutions.**

*Specific Goals:*

- Find affordable, long-term, and convenient storage space for props and costumes.
- Find space where set building can be done efficiently and affordably.

*Strategies:*

- Make phone calls.

*Deadline: N/A - Ongoing*

**Goal #6 — SAYT will explore new ways to generate funds by creating an appropriate investment strategy.**

*Specific Goals:*

- Create a Finance Committee.
- Research brokerage accounts, the pros/cons behind various options and choose a strategy.
- Understand the costs and fees associated with the organization's investment strategy.
- Outline long-term financial goals.

*Strategies:*

- Devise an investment policy with clearly outlined guidelines for the finance committee that are consistent with SAYT's mission and purpose
- Contact our current bank to set up an initial consultation.
- Have the finance committee review the investment policy annually.

*Deadline: January 1, 2020*

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**GOALS AND STRATEGIES — Long-term**

**Goal #1 — SAYT will invest in a permanent facility of its own to be used for storage, office/operational and rehearsal space.**

**Goal #2 — SAYT will establish an endowment fund.**

## Appendix A — ACTION PLANNING

Strategic Goal	Strategy	Objective	Responsibility	Timeline
1 Expand diversity and inclusion.	1.1 Create policies and procedures for inclusive practices.		Governance	06/01/2020
	1.2 Produce a touring production for communities underserved by the arts.		Executive Director	06/01/2020
	1.3 Secure funding for sensory friendly performance.		Finance	06/01/2020
	1.4 Partner with Northern Michigan University and Autism Theatre Initiative for sensory friendly training.		Executive Director	06/01/2020
2 Create stronger and more effective committees.	2.1 Develop committees with clearly defined goals to meet our organization's needs.		Board of Directors	6/1/2020
	2.2 Create policies and guidelines for each committee.		Board of Directors	6/1/2020
	2.3 Recruit additional committee members.		Nominating	6/1/2020
3 Improve marketing strategies.	3.1 Develop Marketing Committee		Board of Directors	12/01/2019
	3.2 Create policies and guidelines for the Marketing Committee.		Board of Directors	12/01/2019
	3.3 Set aside funding to achieve marketing goals.		Finance	12/01/2019
	3.4 Set aside specific dates to take promotional photos.		Marketing	12/01/2019



	3.5 Improve marketing strategies.		Marketing	12/01/2019
	3.6 Identify local businesses to create branded merchandise.		Marketing	12/01/2019
4 Combat burnout.	4.1 Create Wellness and Behavior Committee		Board of Directors	01/01/2020
	4.2 Identify causes of staff and volunteer burnout.		Wellness and Behavior	01/01/2020
	4.3 Set aside funding for increased pay for contract and intern positions.		Finance	01/01/2020
	4.4 Research how other youth theaters handle supervision.		Volunteer and Parent Relations	01/01/2020
	4.5 Create paid intern positions for training in new contractual staff.		Executive Director	01/01/2020
	4.6. Hire or recruit non-parents for supervision.		Wellness and Behavior	01/01/2020
	4.7 Develop a consistent method to show volunteer appreciation.		Volunteer and Parent Relations	01/01/2020
5 Identify space issues and propose solutions.	5.1 Find affordable, long-term, and convenient storage space for props and costumes.		Facilities	06/01/2020
	5.2 Find space where set building can be done efficiently and affordably.		Facilities	06/01/2020
6 Create an investment strategy.	6.1 Create a Finance Committee.		Board of Directors	01/01/2020

	6.2 Devise an investment policy with clearly outlined guidelines for the Finance Committee.		Board of Directors	01/01/2020
	6.3 Research brokerage accounts, the pros/cons behind various options and choose a strategy.		Finance Committee	01/01/2020
	6.4 Outline long-term financial goals.		Finance Committee	01/01/2020
	6.5 Contact our current bank to set up an initial consultation.		Finance Committee	01/01/2020
	6.6 Review the investment policy annually.		Finance Committee	01/01/2020

## Appendix B — DESCRIPTION OF STRATEGIC PLANNING PROCESS USED

### *Assessment* — SWOT Analysis

- Strengths
- Weaknesses
- Opportunities
- Threats

### *Implementation/Goal Setting* — S.M.A.R.T.E.R.

- Specific
- Measurable
- Acceptable
- Realistic
- Timely
- Extend the capability of those working to achieve the goal
- Rewarding to those working to achieve the goal

## **Appendix C — STRATEGIC ANALYSIS DATA (Internal Analysis)**

### **Strengths:**

- Youth participants (talent, number of participants, retention rate)
- Partnership with NMU (rental scene shop/performance space, students, resources)
- Tiered programming by age and experience
- Diverse program offerings
- Quality of productions
- Community support
- Sense of family and belonging for actors/alumni
- Efficient and organized rehearsal process
- Communication with parents
- Volunteers
- Youth leadership within the organization
- Social media presence (improved)
- Board/Leadership
- Dedicated staff and contractors
  - “Contractors” — inclusive of directors, designers, accounting firm, graphic designer, etc.
- Greater diversity/representation in contract positions
- Bank account

### **Weaknesses:**

- Burnout of artistic staff and volunteers
- Reliant on rental rehearsal and performance spaces
- Dependent on the kindness of others
- Donor burnout/fatigue and inconsistent donor support
- Limited family-friendly literature/shows popular among participants and audiences
- Inconsistent staff
- Limited youth input
- Community outreach/lack of diversity
- Social media/website/branding/marketing
- Participant and audience survey response rate
- Backstage supervision and safety (difficult to fill volunteer positions)
- Committees
- Lack of board members with specific skills (accountant, lawyer, etc.)
- Investment plan (what to do with surplus in bank account)

### **Threats:**

- Rental facility scheduling
- Saturation point — When have we grown too much? Too many programs?
- Potential loss of key people in skilled positions
- School productions and competing activities
- Youth burnout
- Other performing platforms (example: YouTube)

### *2017 Threats: (not mentioned this time)*

- *NMU support*
- *LST relationship*
- *Losing youth cut from productions*

### **Opportunities:**

- Community outreach (particularly underserved communities surrounding Marquette)
- Partnership with school clubs
- Financial creativity with bank account surplus
- Endowment
- Continue to develop education opportunities within program
  - Tech and Design (sound, lighting, set, costumes, etc.)
  - Writing and producing
- Greater youth involvement outside of performing
- Improve supervision
- Audience development and bringing in groups
- Sensory friendly performances
- Work with Marquette travel bureau
- Hire specialists
- Implement a donor management system
- Create a fundraising calendar/update development plan
- Sponsorship system
- Automated giving
- Develop formal inclusion and safety policies
- Employee and volunteer appreciation
- Partnership with a “sister” youth theater (reciprocal visits)
- Improve OS grant application score
  - Understanding the adjudication process
- Continuing education for staff

**Priorities:**

- Community Outreach (diversity and inclusion)
  - Social Media/Website/Marketing/Branding
- Combat burnout
  - Recruit and educate more people to take on tasks
- Sensory friendly performances
  - begin with *Legally Blonde, Jr.* this summer
- Continuing education
- Safety and supervision
- Financial creativity
- Donor management system
- Improve committee structure
- Volunteer appreciation
- Board Handbook
  - Orientation, Code of Ethics, Guidelines, Policies and Procedures, Conflict of Interest form

**Needs:**

- Fewer volunteers and more paid positions
- Improve committees (set goals and tasks)
- Revitalize Youth Committee
- Stronger Board recruitment
  - Governance Committee
- Wellness & Behavior Committee
- Improve marketing and media relations
- Develop outreach plan

*2017 Opportunities: (not mentioned this time)*

- *Volunteer handbook*
- *Work with NMU theater program*
- *Funding getting parents/volunteers involved*
- *Ticket app development*
- *Subscription drive*

*2017 Goals:*

- *Board will maintain fiscal responsibility by following a realistic budget and financial statements*
  - *Setting development plan*
  - *Comply with all state and federal requirements*
- *Board and/or Committee will identify space issues and propose resolutions*
- *Establish Committees*
- *Improve Board transitions*
- *Develop strategic partnerships*
  - *Arts and Culture Center*
  - *NMU*
  - *Children's Museum*
  - *History Museum*
- *Improve media relationships*
- *Implement tool to evaluate need and demand*
- *Improve parent and volunteer experience*
  - *Regularly and genuinely express gratitude to volunteers*
- *Long term:*
  - *Endowment*
  - *UP wide, county wide*
  - *Diversify programming*

## D — BOARD COMMITTEES & GOALS

### Board Committee — Marketing and PR

Committee Chair:

*Goal #1* — Set aside specific dates to take promotional photos.

*Goal #2* — Identify local businesses to create branded merchandise.

*Goal #3* — Improve marketing strategies

- Professional promotional photos and videos, production shots, head shots
- Social media presence
- Organizational brochures and posters
- Season promotion poster/advertisement

### Board Committee — Fundraising

Committee Chair:

*Goal #1* — Secure funding for sensory friendly performance.

*Goal #2* —

### Board Committee — Volunteer/Parent Relations

Committee Chair:

*Goal #1* — Research how other youth theaters handle supervision.

*Goal #2* — Develop a consistent method to show volunteer appreciation.

### Board Committee — Finance

Committee Chair:

*Goal #1* — Set aside funding to achieve marketing goals.

*Goal #2* — Set aside funding for increased pay for contract and intern positions.

*Goal #3* — Research brokerage accounts, the pros/cons behind various options and choose a strategy.

*Goal #4* — Outline long-term financial goals.

*Goal #5* — Contact Michelle Contio from Range Bank (our current bank) to set up an initial consultation.

*Goal #6* — Review the investment policy annually.

### Board Committee — Governance

Committee Chair:

*Goal #1* — Create Board of Directors Handbook.

*Goal #2* — Create policies and procedures for inclusive practices.

*Goal #3* — Create policies and guidelines for each committee.

### Board Committee — Youth

Committee Chair:

*Goal #1* —

**Board Committee — Wellness and Behavior**

Committee Chair:

*Goal #1 — Identify causes of staff and volunteer burnout.*

*Goal #2 — Hire or recruit non-parents for supervision.*

**Board Committee — Nominating**

Committee Chair:

*Goal #1 — Recruit additional committee members.*

**Board Committee — Facilities**

Committee Chair:

*Goal #1 — Find affordable, long-term, and convenient storage space for props and costumes.*

*Goal #2 — Find space where set building can be done efficiently and affordably.*

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**E — STAFFING PLANS**

*Reference each of the strategies to reach the goals and consider what kind of capabilities are needed to implement the strategies.*

**F — OPERATING BUDGETS - *Strategic planning budget - to be added in January 2020***

*List the resources you will need to achieve the goals in the strategic plan and the costs to get and use the resources -- especially over the next year. You don't have to be exactly accurate -- besides, you may end up changing your budget as you give more attention to product design and planning. You should do a budget for each of the years included in the span of time covered by your strategic plan -- but give particular attention to the first year of the time span.*

*Look at each of your products. Think about how much revenue the product might generate. Next, think about the expenses to run the program, such as human resources, facilities, equipment, special materials, marketing and promotions, etc.*

**G — FINANCIAL REPORTS - To be based on planning budget**

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## H — MONITORING AND EVALUATION PLAN

*Responsibilities and Frequencies for Monitoring and Evaluation*

<b>Plan Section</b>	<b>Completion Date</b>	<b>Responsibility</b>	<b>Result</b>
1.1		Governance	
1.2		Executive Director	
1.3		Finance	
1.4		Executive Director	
2.1		Board	
2.2		Board	
2.3		Nominating	
3.1		Board	
3.2		Board	
3.3		Finance	
3.4		Marketing	
3.5		Marketing	
3.6		Marketing	
4.1		Board	
4.2		Wellness & Behavior	
4.3		Finance	
4.4		Parent & Volunteer Relations	
4.5		Executive Director	
4.6		Wellness & Behavior	

4.7		Parent & Volunteer Relations	
5.1		Facilities	
5.2		Facilities	
6.1		Board	
6.2		Board	
6.3		Finance	
6.4		Finance	
6.5		Finance	
6.6		Finance	

**Key Questions While Monitoring Implementation of the Plan**

*Monitoring and evaluation activities will consider the following questions:*

1. Are goals and objectives being achieved or not?

If they are, then acknowledge, reward and communicate the progress.

If not, then consider the following questions.

2. Will the goals be achieved according to the timelines specified in the plan? If not, then why?

3. Should the deadlines for completion be changed (be careful about making these changes -- know why efforts are behind schedule before times are changed)?

4. Do personnel have adequate resources (money, equipment, facilities, training, etc.) to achieve the goals?

5. Are the goals and objectives still realistic?

6. Should priorities be changed to put more focus on achieving the goals?

7. Should the goals be changed (be careful about making these changes -- know why efforts are not achieving the goals before changing the goals)?

8. What can be learned from our monitoring and evaluation in order to improve future planning activities and also to improve future monitoring and evaluation efforts?

*Reporting Status of Implementation*

1. Answers to the "Key Questions While Monitoring Implementation of the Plan"

2. Trends regarding the progress (or lack thereof) toward goals, including which goals and objectives

3. Recommendations about the status

4. Any actions needed by management

*Procedure for Changing the Plan*

1. What is causing changes to be made?
2. Why the changes should be made (the "why" is often different than "what is causing" the changes).
3. What specific changes should be made to goals, objectives, responsibilities and timelines?

Reminders:

*Manage the various versions of the plan (including a new date on each new version of the plan).*

*Always keep old copies of the plan.*

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## **I — COMMUNICATING THE PLAN**