



STRATEGIC
PLANNING
SERVICES

DEVOS INSTITUTE
OF ARTS MANAGEMENT

AT THE UNIVERSITY OF MARYLAND

The DeVos Institute of Arts Management provides consultation and training for a wide range of arts institutions, from performing and presenting organizations, museums, galleries, arts schools, and libraries, to botanical gardens, glass-making studios, public art trusts, service organizations, nonprofit cinemas, and many more.

STRATEGIC PLANNING

A strong strategic plan provides a practical roadmap for advancing an organization's mission while navigating rapid changes in technology, demographics, and the economy. In today's tumultuous environment, bold planning can fundamentally improve an organization's trajectory and outlook.

The DeVos Institute's core service provides in-depth, comprehensive, implementable strategic plans. The Institute's planning processes are designed to address a range of organizational states: from those in crisis to those looking to cement and accelerate a position of strength.

Throughout the process, the Institute engages key stakeholders and beneficiaries to provide insight into the organization and its environment. Each plan is carefully tailored to address the organization's unique mission, goals, and challenges. The Institute's approach values transparency and due process, but does not forgo visionary action for the sake of consensus.



ArtPrize (Grand Rapids, Michigan)

PHOTO CREDIT: BRIAN KELLY

THE STRATEGIC PLANNING PROCESS

THE DEVOS INSTITUTE'S STRATEGIC PLANNING PROCESS ENTAILS:

1. **A thorough review of the client organization's mission** as an effective fundraising, marketing, and management tool;
2. **An environmental analysis** that evaluates the relevant field(s) and asks what is required for success among organizations of similar structure, scope, and client base, as well as evaluates how the environment around the organization is changing;
3. **An internal analysis** that determines how the organization compares, at present, to what is required for success given the factors unearthed through the environmental study;
4. **Strategy development**, based on the internal and environmental analyses;
5. Development of **a detailed implementation plan** that outlines tactics required to execute each strategy, assigning responsibility for each, and a deadline for their completion; and
6. **A financial plan** that anticipates the resources required to implement each strategy, and the benefits expected as a result.

All activities, including research, data-gathering, analysis, and writing, are led by the Institute, conducted in collaboration with organization leadership.

The Institute contributes and leverages its existing resources, partnerships, and networks at the local, regional, national, and international levels as appropriate in support of the development of the strategic plan.

Each process includes a detailed analysis and long-term plan for:

- **Artistic and community programming** developed in partnership with the organization's artistic leadership.
- **Programmatic (sales focus) and institutional (brand focus) marketing.** These plans define how the organization will engage audiences and "family" members, including:
 - A plan to increase brand awareness and differentiation from comparators via a methodical approach to producing visibility;
 - Investigation of existing and prospective partnerships;
 - Audience engagement and retention strategies;
 - Social media use; and
 - Year-round maximization of earned revenue opportunities.
- **Board engagement and development,** including:
 - A review of the current board's composition and capacity in relation to the mission and financial needs of the organization;
 - A path to enhance the fundraising and ambassadorial capacity of the current board; and
 - A path to identify, solicit, and manage new board members.
- **Fundraising.** A framework to produce and sustain revenues commensurate with programmatic aspirations over the duration of the plan, including:
 - A plan to identify, cultivate, solicit, and steward major donor prospects;
 - A detailed cultivation strategy to turn *able* prospects into *likely* donors;
 - Evaluation and enhancement of the organization's current annual giving scheme and benefits; and
 - A plan to identify other sources of earned and in-kind revenues, including through strategic partnerships.

IMPACT

The DeVos Institute has worked with arts organizations across genres and around the world to develop and implement practical strategies that sustain ambitious cultural programming.

THE MUNY

ST. LOUIS, MISSOURI

“Despite the hundreds of institutions that the DeVos Institute continues to work with, we have found them to be extremely attentive and responsive. Their eagerness to truly engage in the culture of The Muny while helping shape the future of our organization guarantees an accurate assessment of our strengths and needs. Owing to his extensive knowledge of the national arts landscape and a thorough analysis of the local marketplace, Mr. Kaiser has offered honest and invaluable insight as we work together to develop a realistic strategy for our second century.”

Denny Reagan, President and CEO



PHOTO CREDIT: PHILLIP HAMER

PHILADELPHIA MURAL ARTS PROGRAM

PHILADELPHIA, PENNSYLVANIA

“Working with the DeVos Institute has been a great gift and blessing to the Philadelphia Mural Arts Program. The team led by Michael Kaiser and Brett Egan has the type of wisdom that doesn’t simply come from theory but has been refined by extensive practice. We selected them to lead our strategic planning process and provide technical assistance for its first year of implementation. The outcome is a strong, visionary plan with increased staff and board capacity.”

Joan Reilly, Chief Operating Officer



PHOTO CREDIT: STEVE WEINIK

HI-ARTS

NEW YORK, NEW YORK

“In many cases when working with consultants, clients are given generic solutions that do not account for the history and culture of an organization. Our experience was quite the opposite with the DeVos Institute ... They were highly knowledgeable and efficient in their analysis and recommendations. As such, they developed a comprehensive and succinctly tailored plan that addressed our capacities and needs. I would highly recommend them as consultants and collaborators.”

Dr. Raymond Codrington, Executive Director



PHOTO CREDIT: PRINCE DAVID

“The School for Creative and Performing Arts has often been identified as the jewel in the crown of Cincinnati Public Schools ... This past summer the CPS Board of Education addressed the challenges facing the school, approving a unique management concept for SCPA as recommended by the DeVos Institute, an independent international arts school consultant. The resulting transformation has been rapid and positively amazing.”
Cincinnati Enquirer op-ed on the School for Creative and Performing Arts (Cincinnati, Ohio)

“After a tough year, Miami City Ballet is suddenly coming back strong ... The troupe announced \$3 million in new donations, a lifesaving influx of nearly a quarter of its \$13 million budget.”
Miami Herald on the Miami City Ballet (Miami, Florida)

“Last year [the National Black Arts Festival] was in a dangerous spot. Debt had ballooned and the festival had just lost its third executive director in four years. The budget was cut in half and six staff members were laid off. This year, [Sonya] Halpern, the board chairwoman, is running a fiscally sound program ... ‘[The Institute has] been consulting with the board over the course of the last year as we’ve been thinking about turning the organization around. So much of what you see, and what’s on schedule, is driven out of that new vision.’”
Atlanta Journal-Constitution on the National Black Arts Festival (Atlanta, Georgia)

A REPRESENTATIVE LIST OF RECENT STRATEGIC PLANNING CLIENTS

- Alaska Native Heritage Center (Anchorage, Alaska)
- ArtPrize (Grand Rapids, Michigan)
- Asian Arts Initiative (Philadelphia, Pennsylvania)
- Atlanta Intown Theatre Partnership (Atlanta, Georgia)
- Black Archives History & Research Foundation (Miami, Florida)
- Chicago Jazz Philharmonic (Chicago, Illinois)
- DuSable Museum of African American History (Chicago, Illinois)
- El Museo del Barrio (New York, New York)
- Fort Worth Symphony Orchestra (Fort Worth, Texas)
- From The Top (Boston, Massachusetts)
- Great Lakes Center for the Arts (Bay Harbor, Michigan)
- Hi-ARTS (New York, New York)
- International Center of Photography (New York, New York)
- La MaMa (New York, New York)
- Longhouse Education and Cultural Center at the Evergreen State College (Olympia, Washington)
- Memphis Symphony Orchestra in Residence at the University of Memphis (Memphis, Tennessee)
- Miami City Ballet (Miami, Florida)
- Movimiento de Arte y Cultura Latino Americana (San Jose, California)
- The Muny (St. Louis, Missouri)
- Museum of Contemporary Art Detroit (Detroit, Michigan)
- National Black Arts Festival (Atlanta, Georgia)
- National YoungArts Foundation (Miami, Florida)
- Nickelodeon Theatre (Columbia, South Carolina)
- PA'I Foundation (Honolulu, Hawaii)
- Park Avenue Armory (New York, New York)
- Penumbra Theatre (St. Paul, Minnesota)
- Philadelphia Mural Arts Program (Philadelphia, Pennsylvania)
- Philadelphia Orchestra (Philadelphia, Pennsylvania)
- Philadelphia Theatre Company (Philadelphia, Pennsylvania)
- Qatar Museums Authority (Doha, Qatar)
- Royal Opera House Muscat (Muscat, Oman)
- SAY: Stuttering Association for the Young (New York, New York)
- School for Creative and Performing Arts (Cincinnati, Ohio)
- Serpentine Galleries (London, UK)
- Texas Ballet Theater (Fort Worth, Texas)
- Wallis Annenberg Center for the Performing Arts (Beverly Hills, California)

THE CYCLE

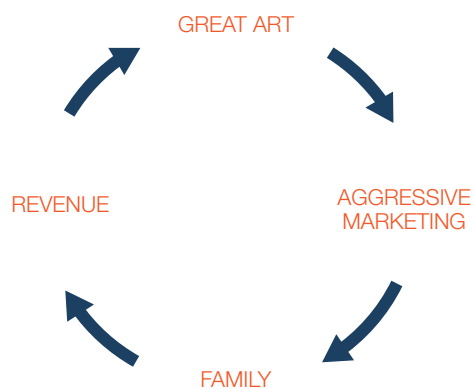
The DeVos Institute’s approach to strategic planning is rooted in a simple, but comprehensive, methodology developed through decades of observation and management of arts organizations in the United States and around the world.

Regardless of art form, geography, or size, thriving arts organizations hold several core characteristics in common:

- Their programming is bold, mission-driven, and balanced;
- They aggressively market that programming, as well as the institution behind it;
- The resulting visibility produces a swell of interest and enthusiasm among a “family” of ticket-buyers, students, board members, donors, funders, and volunteers;
- They make it easy and enjoyable for that family to get more involved—to contribute money, time, or connections; and
- They reinvest revenue produced by that family in even bolder programming that, when marketed well, entices an ever-larger, more diverse, generous, and connected family.

When this repeats year after year, all stakeholders—staff, board, and family—sense they are part of a strong, successful enterprise, and they grow more generous and productive. Their organizations grow incrementally, donor by donor, and slowly build and maintain artistic and financial health.

The DeVos Institute sees this cycle in successful organizations of all types and sizes, urban and rural, and in the United States and abroad.



LEADERSHIP

MICHAEL M. KAISER, Chairman

Michael M. Kaiser oversees the DeVos Institute's training and consulting programs, both in the United States and around the world.

Mr. Kaiser was President of the John F. Kennedy Center for the Performing Arts from January 2001 through August 2014. During his tenure, he expanded educational and artistic programming, oversaw a major renovation effort of most of the Center's theaters, and led the nation in arts management training. In 2001, Mr. Kaiser created the Kennedy Center Arts Management Institute, renamed the DeVos Institute of Arts Management in May 2010. In honor of his accomplishments, the Board of the Kennedy Center named him President Emeritus in 2014.

Mr. Kaiser previously served as Executive Director of the Royal Opera House in London. During his tenure, the Royal Opera House erased its historic accumulated deficit, completed a £214 million redevelopment, created an endowment fund, and greatly increased its level of support from the private and public sectors. Mr. Kaiser also served as Executive Director of American Ballet Theatre, Executive Director of the Alvin Ailey American Dance Theater Foundation, and General Manager of the Kansas City Ballet.



PHOTO CREDIT: ILAN MIZRAHI

BRETT EGAN, President

Brett Egan leads the Institute's team of consultants and teachers, supporting organizations worldwide on such concerns as strategic planning, artistic planning, marketing, human resource development, and fundraising. Projects under his direction include multi-year capacity building initiatives in partnership with the Ford Foundation and Bloomberg Philanthropies; regional training intensives in San Jose, Portland, and Baltimore; a three-year fellowship for arts leaders from around the world; and long-term consultancies with clients in nearly every major cultural discipline. Under Mr. Egan's leadership, the Institute has delivered multiyear, first-of-their-kind training programs in Ireland, Croatia, Trinidad and Tobago, Vietnam, and the United Kingdom.

From September 2011 until December 2012, Mr. Egan served concurrently as Interim CEO of the Royal Opera House Muscat (Oman), working with local leadership to open this first-of-its-kind institution on the Arabian Peninsula. From 2006 to 2009, Mr. Egan served as Executive Director of Shen Wei Dance Arts, a resident company at the John F. Kennedy Center for the Performing Arts and a principal contributor to the 2008 Olympic Opening Ceremonies in Beijing.



PHOTO CREDIT: DEAN ALEXANDER

ABOUT THE INSTITUTE

The DeVos Institute of Arts Management provides training, consultation, and implementation support for arts managers and their boards.

It operates on the premise that while much is spent to train artists, too little is spent to support the managers and boards who keep those artists at work.

At the same time, rapid changes in technology, demographics, government policy, and the economy have complicated the job of the manager and volunteer trustees. These changes continue to accelerate.

Organizations that have mastered these trends are flourishing—even leveraging them to their advantage. For those that have not, however, the sense that “something’s not quite right” can seem unshakeable. For too many, these changes have led to less art, decreased visibility, diminished relevance—even financial collapse.

These challenges inform the Institute’s approach. Never has the need to balance best practices and new approaches been so urgent.

Institute leadership and consultants—all arts managers themselves—understand that, in today’s environment, there is no time or resource to waste. Therefore, Institute services are lean, direct, and practical.

The DeVos Institute has served more than 1,000 organizations from over 80 countries since Michael M. Kaiser founded it during his tenure as President of the John F. Kennedy Center for the Performing Arts in Washington, D.C. While environments, objectives, and disciplines vary, each of the Institute’s clients shares the desire to create, market, and sustain exemplary cultural programs.

In 2014, the DeVos Institute transitioned to the University of Maryland, where it continues to offer support to individuals, organizations, and—in collaboration with foundations and governments—to communities of organizations around the world.



PHOTO CREDIT: DANIEL AZOULAY

Miami City Ballet (Miami, Florida)

INSTITUTE CONSULTING SERVICES

Strategic Planning and Implementation Support

Other Planning and Implementation Services

- Capital campaigns
- Endowments
- Interim management
- Programmatic and institutional marketing
- Pricing
- Season and program design

Private Intensives for Individual Organizations

- Launching the strategic planning process
- Reviewing and updating a current strategic plan
- Reviewing and updating the organizational mission
- Establishing and reviewing board and staff roles and responsibilities
- Crisis management
- Department-specific training

Organizational Audits

- Total organizational performance
- Board structure and performance
- Financial structure and performance
- Marketing operations
- Fundraising operations
- Staffing structure

Planning, Operating, and Sustaining New Cultural Institutions

- Capital fundraising campaigns
- Staff training
- Facility planning
- Community engagement
- Policy development
- Information technology
- Strategic partnerships
- Budgeting

Services for Arts Schools

- Strategic planning
- Executive, senior staff, and board leadership coaching
- Board and staff intensives



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