

# CAPACITY BUILDING MICHIGAN LAKESHORE

## ABOUT THE PROGRAM

The Dick and Betsy DeVos Family Foundation, in partnership with the DeVos Institute of Arts Management at the University of Maryland, is pleased to announce **Capacity Building: Michigan Lakeshore**, a two-year technical assistance and planning intensive for up to 15 arts and cultural organizations throughout Holland, MI and the Michigan Lakeshore.

Launching in Fall 2022, the program is fully underwritten by the Dick and Betsy DeVos Family Foundation.

The arts and culture sector is changing rapidly, but certain fundamentals remain: all organizations require highly distinctive programming, vigorous marketing campaigns, strong boards, and a robust family of donors, members, and funders.

These essentials, however obvious, can be difficult to assemble and maintain.

This is the key role of this program: to assist participating organizations in their efforts to develop consensus on mission, vision, and values and to put in place simple, effective, and right-sized strategies to execute in each of these essential areas of practice.

Since 2001, when the Institute was founded by Michael M. Kaiser at the John F. Kennedy Center for the Performing Arts, the DeVos Institute's capacity building programs for arts managers and their boards have served more than 2,000 organizations in over 30 diverse communities throughout the United States and around the world. Taken together, these programs represent the most comprehensive capacity building effort for the arts, culture, heritage, and humanities sectors in the United States.

**Capacity Building: Michigan Lakeshore** will provide in-depth training and consultation for arts managers, artistic directors, and board members modeled on the Institute's planning methodology, The Cycle. This methodology – which is now used by thousands of organizations worldwide, and is widely taught throughout management courses in the United States and beyond – is designed to support ambitious artistic planning, pragmatic financial planning, productive board engagement, and effective marketing practice.

In addition, the Institute will work with each participating organization, one-on-one, to conduct a six-month strategic planning process that will result in a bespoke, five-year strategic plan. Planning will be followed by six months of implementation support to assist the organization in enacting key strategies developed through the planning process.

Lastly, the Institute will also facilitate multiple roundtable discussions between program participants and local stewards of economic development.

## ENCLOSURES

- The Cycle
- Program Components
- The Strategic Planning Process
- The Application and Selection Process
- The Program Partners



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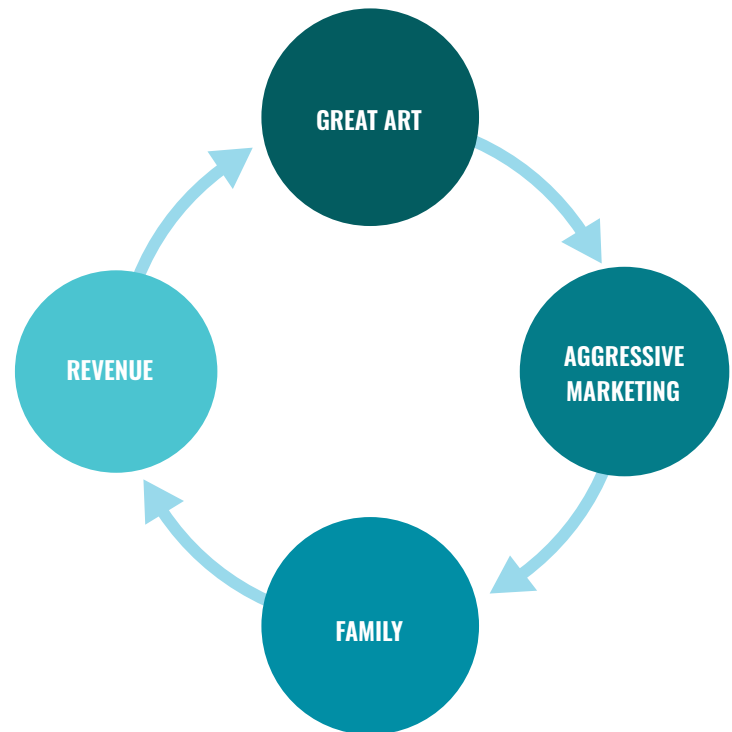
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# The Cycle

The Cycle is a simple, but comprehensive, theory of non-profit sustainability. This practical philosophy observes that, regardless of art form, geography, or size, thriving cultural 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, 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 necessary infrastructure, as well as ever-more dominant programming that, marketed well, entices a larger, more diverse, generous, and connected family.

When this cycle repeats year after year, all stakeholders – staff, board, and family – sense they are part of a strong, successful enterprise. For those with means, this momentum encourages increased generosity and ambassadorship; for those with skill and time, a swell of pride and focus – aligned with mission – drives increased productivity. These organizations grow steadily – donor by donor, patron by patron, ally by ally – to build and sustain dominant artistic program and financial health.



## THE CYCLE AUDIT

Participating organizations will be asked to evaluate their progress throughout the program using the Institute’s Cycle Audit. This self-assessment survey provides a structure for organizations to set goals and report on their status at the beginning and end of the program in key capacity areas.

Using this data, participants will assess their organization’s financial and operational position prior to the start of the process and on completion of it.

In particular, the Cycle Audit will be used to determine several important indicators of return including:

- Change in planning and management behaviors
- Change in gross revenues, revenue sources, and profit/loss
- Change in Board behavior, engagement, and financial productivity
- Change in numbers of individuals served
- Change in role in economic development of the region

# Program Components

## GROUP INTENSIVES

The program includes a total of six virtual or in-person group intensives offering support in the following areas:

- The Cycle and Long-Term Program Planning
- Institutional and Programmatic Marketing
- Fundraising and Revenue Diversification
- Board Development and Engagement
- Strategic Planning and Implementation

Intensives are led by Chairman Michael M. Kaiser and President Brett Egan, as well as Institute senior staff and advisors. Each organization's executive director, artistic director (or comparable staff member), and board chair (or senior board member) are encouraged to attend each intensive.

## STRATEGIC PLANNING

The strategic planning process will produce a comprehensive roadmap for increased effectiveness in long-term artistic and educational programming; marketing and communication; community and volunteer engagement; cross-sector collaboration; fundraising; and board engagement. (See overleaf for more information.)

## CONSULTATIONS

Each organization is paired with an Institute advisor who will provide ongoing, individualized consultations. These consultations provide hands-on assistance as organizations develop and implement their strategic plans. Participants and their advisors convene every four to six weeks via conference calls to develop plans in core competency areas, track progress, troubleshoot challenges, and re-calibrate strategy as needed.

## PLANNING PROMPTS

To support progress between intensives, the Institute has developed a suite of practical planning prompts. These no-nonsense tools, together with guidance from Institute advisors, will assist managers and their boards in the development of concrete next steps in follow up to each intensive.

## ROUNDTABLES

Additionally, organizations will participate in four roundtables with local stewards of economic development, facilitated by Institute leadership. These sessions will address a framework for further integration of arts and culture activity into the region's plans for economic development.

## PROGRAM TIMELINE

Sept. 14, 2022	Intensive 1: The Cycle and Artistic Planning
Oct. 14, 2022	Intensive 2: Maximizing Board Productivity
Nov. 11, 2022	Intensive 3: Institutional & Programmatic Marketing
Dec. 8, 2022	Intensive 4: Fundraising & Revenue Diversification
Jan. 27, 2023	Intensive 5: Strategic Planning
May 22, 2023	Economic Roundtable 1
June 29, 2023	Economic Roundtable 2
Sept. 12, 2023	Economic Roundtable 3
Nov. 14, 2023	Economic Roundtable 4
July 11, 2024	Intensive 6: Capstone



# The Strategic Planning Process

## THE PLANNING PROCESS ENTAILS:

A thorough review of the organization's mission as an effective fundraising, marketing, and management tool;

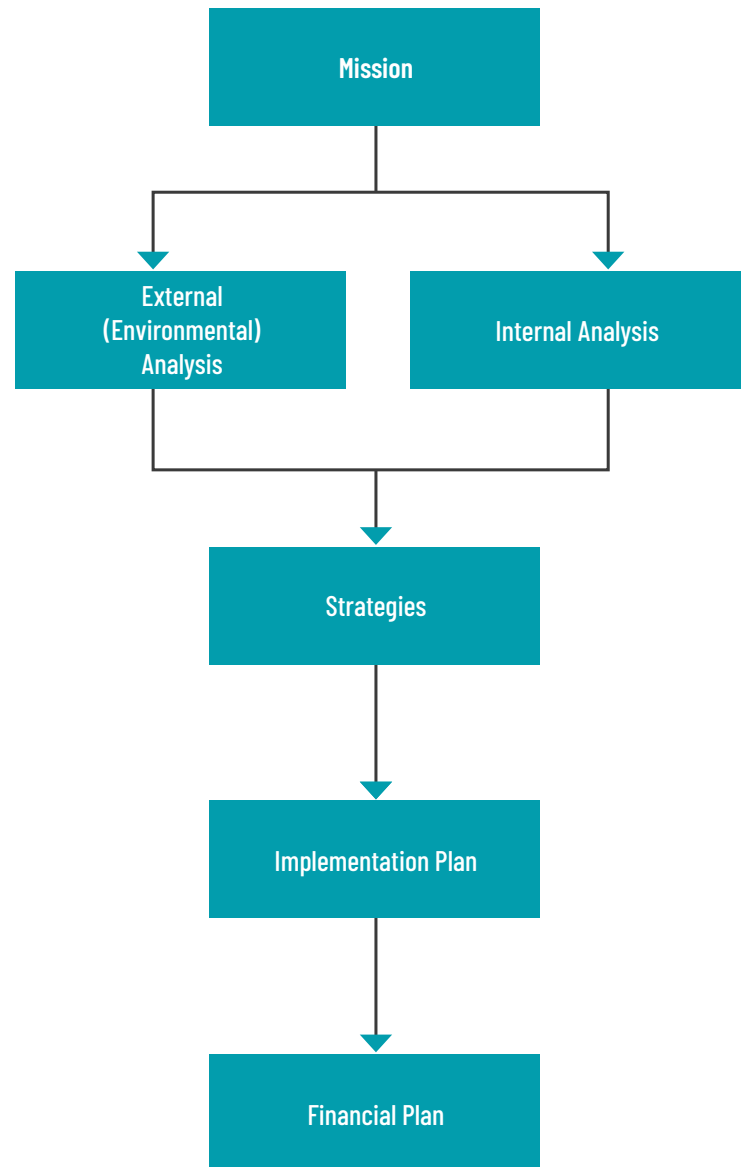
An environmental analysis, conducted by the Institute, that evaluates the relevant field(s) and identifies what is required for success among organizations of similar structure, scope, and user base, as well as evaluates how the environment around the organization is changing;

An internal analysis, conducted by the Institute, that determines how the organization compares, at present, to what is required for success given the factors unearthed through the environmental study;

Strategy development, conducted by the Institute in collaboration with the organization, based on the environmental and internal analyses;

A detailed implementation plan, developed by the Institute in partnership with the participating organization, that outlines tactics required to execute each strategy, assigning responsibility for each, and a deadline for their completion;

And a financial plan, developed jointly by both parties, that projects the income and expense structure of the organization over the full timeframe of the plan, accounts for the resources required to implement each strategy, and projects the benefits expected as a result.



# The Application & Selection Process

## SELECTION

Successful applicants will be selected through a broad-based process that assesses goals, financial status, artistic plans, and commitment to the program. The DeVos Institute and the Dick and Betsy DeVos Family Foundation will prioritize assembling a cohort of dynamic, diverse arts organizations committed to building capacity through the program.

## APPLICATION

The **Capacity Building: Michigan Lakeshore** application must be completed online. The form can be accessed [HERE](#).

Applications are due **Friday, July 29**.

## INFORMATION SESSION

An Information Session will be held on **Thursday, June 23** from 9:00 – 10:00 am by Institute President Brett Egan to discuss the program and respond to questions potential applicants may have as they prepare their materials for submission.

Registration is required. Interested parties may register [HERE](#) by **Friday, June 17** to receive session details.

## APPLICATION TIMELINE

Thursday, June 9	Applications become available
Thursday, June 23	Online Information Session
Friday, July 29	Applications due
July – August	Application review and participant selection
Friday, August 26	Participant notification

## ELIGIBILITY

This opportunity is open to cultural organizations in Holland, Zeeland, Saugatuck, and Grand Haven, as well as their surrounding towns.

The program's training and curriculum is applicable to a broad cross-section of cultural disciplines, including:

- Accredited museums (visual, historical, science, etc.)
- Presenting and producing companies (dance, theatre, music, opera, etc.)
- Community-based organizations
- Arts education providers
- Literary organizations
- Arts advocacy organizations
- Other arts and culture institutions

Successful applicants will be able to provide:

- A compelling rationale for participation
- A signed commitment by executive, artistic, or board leadership (or equivalent)
- The previous year's audited financial statements
- Evidence of at least three years of operation and programming
- Evidence of at least one permanent staff member (or part-time equivalents)

## QUESTIONS?

Questions regarding the program, application process, or information session may be directed to Marie Gossman at [CapacityBuilding@devosinstitute.net](mailto:CapacityBuilding@devosinstitute.net).



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# Program Partners

## ABOUT THE DEVOS INSTITUTE

The DeVos Institute of Arts Management at the University of Maryland provides training, consultation, and implementation support for arts, culture, education, and humanities institutions worldwide. Since its inception in 2001 at the John F. Kennedy Center for the Performing Arts in Washington, D.C., the Institute has advised more than 2,000 organizations from over 80 countries in the implementation of a wide variety of planning and operational objectives.

Foremost amongst its services is the development of practical strategic and business plans to support organizations at start-up, transitional, and advanced operational stages. In this work the Institute has advised a broad range of institutions in the United States, Europe, Asia, and the Middle East including the Apollo Theater (New York City), the American Repertory Theater at Harvard University (Cambridge, MA); the Yale Schwarzman Center (New Haven, CT); Qatar Foundation (Doha, Qatar), The National Kaoshiung Center for the Arts (Taiwan), Motown Museum (Detroit, MI), the National Symphony Orchestra (Washington, D.C.); Cooper Union (New York City); The National September 11 Memorial and Museum (New York City), the Serpentine Galleries (London); and the Royal Opera House Muscat (Oman), to name a few.

These services often combine the development of program planning; marketing and fundraising strategy; board development; and financial planning with comprehensive capital campaign planning services that assist organizations in determining right-size and fundraising potential. Campaign planning and implementation services support clients in the development of campaign goals and budgets; calibrating goals to market as advised by robust feasibility analysis; source prospecting, cultivation, and solicitation; anticipating the impact of the campaign on the core operation; identifying and structuring campaign leadership; and campaign implementation.

In this work, the Institute has developed expertise in a wide range of arts, culture, humanities and educational institutions, including performing and presenting organizations, museums, galleries, art schools, libraries, universities, public media, public art trusts, and nonprofit filmmaking institutions. Recent, representative clients illustrating this range of application include the National Public Radio Foundation (Washington, D.C.); the Sundance Institute (Park City, UT and Los Angeles, CA); the City of Philadelphia Mural Arts Program; the Park Avenue Armory (New York City); the Charles H. Wright Museum of African American History (Detroit, MI); the National YoungArts Foundation (Miami, FL); the Loggerhead MarineLife Center (Jupiter, FL); Miami City Ballet (Miami, FL); the LongHouse Reserve (East Hampton, NY); Santa Monica College and the Broad Stage (Santa Monica, CA); and Public Art Fund (New York City).

As a consultant and educator, the Institute has been engaged by national, state, and local governments as well as leading philanthropies to provide long-term, intensive training and support for thousands of cultural organizations in over 30 American cities and over a dozen countries around the globe. These philanthropies include the Ford Foundation, for which the Institute led a multi-year initiative to support 27 diverse organizations throughout the United States in the development of right-sized, sustainable infrastructure. Other recent philanthropic and government partners include the national funding and/or arts agencies of England, Ireland, the Czech Republic, Vietnam, Norway, Croatia, Trinidad and Tobago, Oman, and Taiwan.

In partnership with Bloomberg Philanthropies, the Institute has led the most comprehensive known capacity building program in United States history. Through this partnership, which extends from 2009 to present, the Institute has trained and/or consulted over 700 organizations in fourteen



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# Program Partners

## ABOUT THE DEVOS INSTITUTE (CONTINUED)

American cities: Atlanta, Austin, Baltimore, Boston, Chicago, Dallas, Denver, Detroit, Los Angeles, New Orleans, New York City, Pittsburgh, San Francisco, and Washington, D.C.

In 2018, in partnership with the Cultural Council of Palm Beach County, the Institute led the formation of Council's Institute for Cultural Advancement with a year-long training and planning intensive for ten Palm Beach County-based arts, culture, and humanities institutions. This program, focused on catalytic fundraising, supported a wide diversity of institutions in the evaluation of current fundraising capacity; campaign feasibility analysis; and the construction, strengthening, or implementation of current campaign plans.

Other philanthropies by which the DeVos Institute has been recently engaged as a consultant or service provider include the American Express Foundation; Bank of America; Business to Arts (Ireland); DTE Energy Foundation; Frey Foundation; Grand Rapids Community Foundation; John S. and James L. Knight Foundation; Kresge Foundation; Miami-Dade County Department of Cultural Affairs; Michigan Council for Arts and Cultural Affairs; the Murdoch Trust; the Oregon Community Foundation; Steelcase Foundation; Trust for Mutual Understanding; Upper Manhattan Empowerment Zone; and the U.S. Department of State.

## ABOUT THE DICK AND BETSY DEVOS FAMILY FOUNDATION

The Dick and Betsy DeVos Family Foundation supports projects and initiatives that cultivate leadership and accelerate transformation. Striving to be a catalyst for positive change, the Foundation invests in programs focused on education, community, the arts, justice, and leadership.

*"The capacity building seminars offered senior staff three commodities in short supply for nonprofits: time; expertise; and support to reflect and develop new strategies and tactics to achieve our programmatic and fundraising goals."*

**Ellen Metzger, Program Participant**  
Strategic Advisor, Artists for Humanity  
Boston, Massachusetts

*"With the invaluable help of the DeVos team through training and workshops, we developed a new road map on how to strengthen and align our efforts, plan longterm, and importantly, tell our whole story. We are ready to embark on the next steps of a strategic plan that secure AFS's ability to make independent filmmaking and global film culture accessible in Austin and in Texas over the long haul."*

**Rebecca Campbell, Program Participant**  
Chief Executive Officer, Austin Film Society  
Austin, Texas



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