



**Strategic Plan
2012-2016**

Approved 11/4/11

**Greater Philadelphia Cultural Alliance
Strategic Plan, 2012-2016
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The Greater Philadelphia Cultural Alliance Strategic Plan, 2012-2016

Introduction

Over the last six months, the Cultural Alliance's leadership immersed itself in a strategic planning process that involved a wide variety of inputs, research and discussion. Even simple questions triggered complex questions and thought. But out of those questions some clear themes emerged--themes that have helped us frame the plan, and at its core, our work and our priorities going forward.

So what did we learn?

We learned that the cultural community is more active and diverse than ever before, yet operating in an environment that is increasingly fragmented in terms of both resources and the breadth of cultural activity demanded by the public. On top of that, we are in the midst of an unprecedented financial downturn that has yet to end and represents an historic and fundamental shift in the global economy.

Amidst such uncertainty and so many complex challenges, we recognized two core things. The first is that the Cultural Alliance continues to have an important and unique role to play. As a regional leader and umbrella service organization, the Cultural Alliance provides critical resources that we can deliver in a way that others cannot. We can provide leadership in times of challenge. We can leverage the collective assets of our community and deliver services and programs that make the sector stronger and healthier. We remain THE central voice for the cultural sector and its powerful impact on community, economic, and personal growth.

The second is that, while our constituents and their needs are more diverse, our resources will always be limited. That requires us to fully understand the evolving scope of our sector and its many needs, from which we must make careful choices about which services we provide. We will make those choices by internalizing the guiding principles of our strategic plan and rigorously applying a strategic filter that allows us to prioritize those programs that we are best suited to deliver, that best serve our constituents, and that maximize our limited resources.

If we are successful in our efforts, we will not only make the sector stronger, but we will make our community stronger and realize our vision for Philadelphia as a region that is a creative world class destination empowered and defined by a healthy and vibrant cultural sector.

Background

Established in 1972 by nine Philadelphia cultural institutions to coordinate historical and cultural activities for the Bicentennial Celebration, the Greater Philadelphia Cultural Alliance was subsequently incorporated as a membership organization for cultural organizations to discuss and resolve issues of mutual concern. As the Alliance approaches its 40th anniversary the organization continues its commitment to: being thought leaders and advocates for the cultural sector; increasing revenue streams for the cultural sector through new public/private models; making the cultural sector more effective and efficient through strategic partnerships, consolidation, transparency and information sharing; and committing to serving a more inclusive cultural sector not defined by legal status or business model.

Fiscal Year 2011 was a year of great transition for the Cultural Alliance. The organization appointed a new President, Tom Kaiden, who had served as the Alliance's Chief Operating Officer and Acting Executive Director for nine years. We launched a new cause strategy—"Arts & Culture: It's How We Grow.®"—that augments our existing strengths in policy and audience development with a new emphasis on community engagement. At the policy level, the Cultural Alliance deepened its statewide relationships with the new administration, legislators and peer organizations. Administratively, the Alliance reduced its staffing level by three positions.

The Cultural Alliance also used this year to reflect on the effectiveness of our audience development programs under Engage 2020, and think about new directions for that work—commissioning the second Cultural Engagement Index survey; hiring an outside evaluator to review our programs to date; and convening local and national leaders in the field to look at how the Cultural Alliance might re-shape its programs to expand audiences and improve the customer experience.

The year closes with the adoption of a new 5 year strategic plan, the result of a planning process that included: an internal organizational review; desk research and staff interviews; a contextual review including external interviews with Cultural Alliance constituents, funders, and community leaders; a Board retreat, and consideration of multiple organizational scenarios. The Alliance took up 4 primary areas of inquiry during the planning process:

- The Critical issues facing the cultural community in the region, and the Cultural Alliance's role in these issues;
- Regional development, economic, and funding issues;
- The supply and demand debate and where the Cultural Alliance stands on informal creative practice and the broader cultural universe; and
- The Cultural Alliance's role in promoting best practice in capitalization, organizational behavior, and adaptability for cultural organizations.

Our preliminary findings included:

- The Philadelphia region is going through both a cultural renaissance and crisis—according to one interviewee it is the “best of times and the worst of times.”
- Philadelphia’s population is both aging and growing more diverse.
- Cultural participation in Philadelphia is strong, but participation patterns are changing.
- The future picture for nonprofit revenue is mixed, and some question whether the sector is sustainable at current levels.
- The larger economic and civic context offers both challenges and opportunities.
- The constituency of the Cultural Alliance is unclear.

The Planning process concluded with a Board review of a revised Mission and Vision for the Alliance, new Strategic Priorities for the organization, a revised definition of the Alliance’s Constituency, a Logic Model delineating all of the Alliances programmatic and organizational strategies, a Strategic Filter to be used for organizational decision-making, and a Dashboard of metrics by which to measure progress toward the Alliance’s desired Outcomes. The staff and Board feel that the following materials represent a critical evolution at the right time for the Alliance and the sector.

**Greater Philadelphia Cultural Alliance
Strategic Plan, 2012-2016
Mission and Vision**

Mission:

We lead, strengthen and give voice to a diverse cultural sector that is making Philadelphia a world-class region to live, work and play.

Vision:

Greater Philadelphia is the place where creative people want to be. The cultural sector is integral to the quality of life, social fabric and economic vitality of the region and its residents:

- The region has a global reputation for the **quality** and diversity of its cultural producers and creative industries;
- Arts and culture is viewed as an **investment, not an amenity**-- an engine for personal, community, and economic growth;
- The region's cultural sector is **adaptive and well-capitalized**
- The region's citizens are **passionate cultural participants, practitioners and advocates**;
- In The Cultural Alliance, the region has a **strong cultural leadership organization** that connects resources strategically and efficiently.

**Greater Philadelphia Cultural Alliance
Strategic Plan, 2012-2016
Strategic Priorities**

Based on the work of the Board strategic planning committee, undertaken between May and October 2011, the Cultural Alliance has established five Strategic Priorities for our work over the next five years:

- 1) Integrate culture as a **strategic competitive advantage** for the Philadelphia region, and essential to community development, economic development and the personal growth of its residents
- 2) **Align our advocacy agenda with partners** to build critical mass and integrate culture into broader community goals
- 3) **Lead by example** and promote adaptive practices that move the cultural sector towards greater relevance and impact
- 4) **Unite and interconnect** a cultural sector that is inclusive, diverse and collaborative
- 5) **Strengthen the sector** by helping cultural enterprises to adapt, identify their unique value propositions, diversify their audiences and build engaging, high quality experiences

Greater Philadelphia Cultural Alliance Strategic Plan, 2012-2016 Constituency

The Community:

The Alliance's work benefits all residents of the Greater Philadelphia region, for whom a vibrant cultural sector increases economic prosperity, fuels creativity, generates civic pride, enhances educational outcomes, strengthens neighborhoods, and improves quality of life. The Alliance achieves its work through partners (with whom we share strategies) and members (for whom we provide services).

Partners:

The Cultural Alliance recognizes that in a time of great need and limited resources, collaboration is essential. There are multiple groups for whom cultural vibrancy is a primary or secondary objective, and we will actively seek to partner with them. Our partners include:

- Policy makers
- Business leaders
- Funders
- Peer service organizations
- Members
- Researchers
- Economic development agencies
- Education providers
- Nonprofits from other sectors

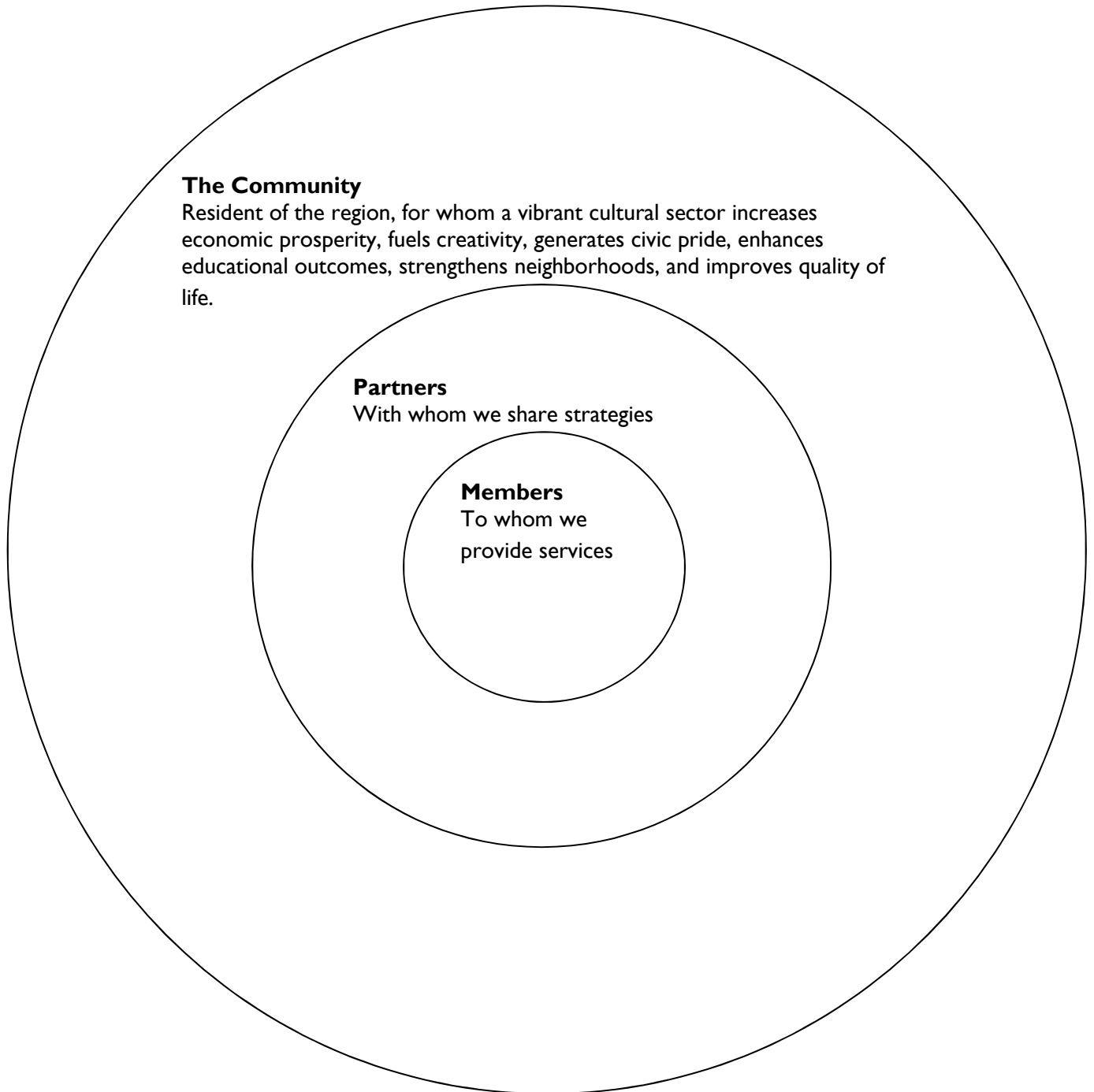
Members:

Membership currently is limited to 501c-3 non-profit cultural organizations (e.g., arts, science, nature, heritage, humanities, education). We will re-evaluate the concept of membership to include new groups beyond non-profit cultural organizations, reflecting environmental changes and new business models that are emerging. This expansion will be incremental however, to ensure that the Alliance builds on, and does not diminish, its unique value to current core members. Potential categories of expansion include:

- Cultural producers, including: for-profit presenters, small businesses, individuals
- Non-cultural nonprofit organizations that present and produce: faith-based, social service, community-based
- Advocates

As it expands, the Alliance will employ a tiered benefit and pricing structure to recognize different levels of affiliation—and different program and service combinations—for different members. This tiered approach will enable the Alliance to focus greater resources on those organizations with the adaptability and capacity to meet community needs, regardless of size, discipline or business model.

Cultural Alliance Constituency Framework



**Greater Philadelphia Cultural Alliance
Strategic Plan, 2012-2016
Strategic Filter for New Program Ideas**

The Cultural Alliance's strategic planning process confirmed that the Alliance's Board, staff and constituents have an extraordinary opportunity to expand programs and services to multiple constituents on multiple levels. At the same time, the Alliance's ability to select a limited number of these ideas for strategic development needs to be strengthened. The Cultural Alliance needs to develop its capacity to operate with less dependence on contributed income, and more focus on programs and services for core constituents.

To that end, the Cultural Alliance's Board has endorsed that together the Board and staff will confirm that programs or initiatives are able to pass successfully through a "strategic filter" that includes these questions:

Needs (must answer yes to all of the following):

1. Is there an **unmet need** for this program or service?
2. Is the Cultural Alliance **well suited** and resourced to meet this need?
 - If not, is there a strategic partnership and reliable partner that would better address/advance this issue? (And should we forge that alliance or leave this issue to the partner to address?)
3. Does it **serve our constituents***?
 - And are we confident it does not negatively impact other core partners or members?
4. Can we identify how this would be **supported financially**?
 - Does it bring in revenue? If not, where will the money come from? If the initiative is grant funded, what is the plan when the grant expires?
5. Are we confident about the **potential impact and probability of success**?
 - Is this a good risk?

Wants (should answer yes to most of the following)

1. Is this new program **complementary** with our other programs/services?
2. Is this the **optimal time** to take on this program?
3. Are we **excited** about it?

* See *Constituency Model* on p. 7

Greater Philadelphia Cultural Alliance Strategic Plan, 2012-2016 Logic Model

The Logic Model is a graphic representation of the Cultural Alliance's activities. The following are how each of the categories of the Logic Model are defined:

Strategies: The activities that will be employed to accomplish the organization's priorities

Outputs: What these strategies produce in terms of programs/services. (Note: the Outputs listed here are highlights of the Cultural Alliance's activities and may change or be augmented in the annual operating plan with changes in the environment.)

Outcomes: How the organization's constituents will be different as a result of this work. Or what will be different in their operating environment. In the case of the Cultural Alliance, a service organization, some outcomes are a direct result of the organization's work, and some outcomes are influences partially by the work of the Cultural Alliance, and partially by its constituents, partners, and others in the operating environment.

Strategic Priorities:

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- 3) **Lead by example** and promote adaptive practices that move the cultural sector towards greater relevance and impact
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STRATEGIES	OUTPUTS
<p>Constituent Service strategies:</p>	
<p>Collaborative Tools:</p> <ul style="list-style-type: none"> • Provide collaborative marketing tools • Introduce programs to reach underserved demographics • Explore, develop and provide organizational capacity tools • Develop programs to enhance visitor experience • Evaluate individual giving platform for the sector, and if positive, launch program 	<p>Collaborative Tools:</p> <ul style="list-style-type: none"> • PFG and Funsavers established as market leaders in the events calendar and cultural e-blast categories • Teen pass program launched • Audience Analytics (list co-op) enhanced to provide cultural orgs. with affordable audience insight tools • New visitor experience tool launched, evaluated and implemented • Individual giving platform evaluated and launched (if evaluation positive)
<p>Communications:</p> <ul style="list-style-type: none"> • Produce public relations on sector’s value • Promote unified message framework • Produce communications that emphasize data + stories • Seek public platforms to present research 	<p>Communications:</p> <ul style="list-style-type: none"> • 6 PR campaigns promoted annually that leverage “Grow” framework through data + stories • 6 public platforms delivered for each research report • 3 op-ed pieces on key civic issues developed and released annually
<p>Advocacy:</p> <ul style="list-style-type: none"> • Find opportunities to collaborate on civic agenda with diverse sectors • Educate legislators at state and local level to advance favorable policies • Build pro-active cultural policy agenda (e.g. cultural district legislation, county cultural infrastructure, regional quality of life initiative) • Strengthen statewide partnerships to advance policy • Convene government affairs directors group regularly 	<p>Advocacy:</p> <ul style="list-style-type: none"> • Annual retreat held to establish proactive policy agenda • Relevant partners convened and mobilized to advance new cultural policy agenda • Cross-sector advocacy efforts established • State and city legislative briefings held annually • Meetings held with candidates for governor and mayor to advocate culture platforms • 5 advocacy partner orgs involved in regular statewide meetings to coordinate strategy

<p>Research:</p> <ul style="list-style-type: none"> • <i>Share primary and secondary research on engagement and demographic trends of present and prospective participants</i> • <i>Develop and disseminate audience research and analytical tools that enable individual organizations to understand their own market better</i> • <i>Monitor and report on health of sector</i> • <i>Develop regional activity analysis/repository of information</i> 	<p>Research:</p> <ul style="list-style-type: none"> • <i>3 major research reports released</i> • <i>10 local and national conference presentations given</i> • <i>Cultural Alliance research cited in at least 3 research publications</i> • <i>Online repository of cultural and other social service programs, with a focus on two issue areas identified through research developed and continuously updated</i>
<p>Continuous Learning:</p> <ul style="list-style-type: none"> • <i>Provide professional development that advances sector skills and networks</i> • <i>Provide professional development to enhance sectors' internal capacity</i> • <i>Develop learning programs that emphasize research "into action" creating formats, tools, and materials that apply new skills and knowledge</i> • <i>Monitor literature and survey members to respond to the learning needs of the field</i> 	<p>Continuous Learning:</p> <ul style="list-style-type: none"> • <i>6 annual workshops/convenings addressing key sector issues produced</i> • <i>Supply/Demand consulting provided to 10 clients</i> • <i>Members surveyed bi-annually re: learning needs</i>
<p>Community Engagement:</p> <ul style="list-style-type: none"> • <i>Connect cultural groups to local civic efforts through community engagement team in-field meetings</i> • <i>Support neighborhoods & communities that have: identified their priorities, have community leadership & infrastructure, and have predisposition to arts & culture</i> • <i>Support local cultural service organizations that serve as community hubs</i> 	<p>Community Engagement:</p> <ul style="list-style-type: none"> • <i>Online repository established to facilitate connections between cultural & civic groups</i> • <i>Annual convening of Arts Based Community Development communities held</i> • <i>Feasibility of county-wide cultural service agency tested in a suburban county, and launched where go/no go decision is positive</i>

Organizational Strategies:	
<p>Cultural Alliance Marketing/Communications:</p> <ul style="list-style-type: none"> • <i>Improve social media utilization to increase reach</i> • <i>Re brand Alliance to integrate “Arts & Culture: It’s How We Grow” positioning</i> • <i>Upgrade website to reflect above changes and position as repository of information</i> 	<p>Marketing/Communications:</p> <ul style="list-style-type: none"> • <i>Social networking metrics increased by 15% annually.</i> • <i>Rebranding launched and integrated into all materials by FY14</i> • <i>Online presence re-structured to focus on delivering issue-based campaigns</i>
<p>Membership:</p> <ul style="list-style-type: none"> • <i>Analyze membership categories and evolve services to meet needs</i> • <i>Develop broader membership structure that reflects evolving creative sector</i> • <i>Set goals for diversity within membership in terms of cultural practice, audiences served, geographic locations and budget size</i> • <i>Devise renewal system that is more automatic and incentivizes prompt payment</i> 	<p>Membership:</p> <ul style="list-style-type: none"> • <i>3 new member services launched</i> • <i>Annual diversity goals established in operating plan</i> • <i>Membership structure expanded beyond 501C-3 model</i> • <i>Renewal system revised to require follow-up with less than 20% of members</i>
<p>Fundraising:</p> <ul style="list-style-type: none"> • <i>Continually increase the ratio of general operating to program specific funding</i> • <i>Raise and maintain visibility and funding from foundation funders not currently part of CA portfolio</i> • <i>Develop and maintain individual giving strategy for both major gifts and the grassroots</i> • <i>Build and maintain risk capital</i> 	<p>Fundraising:</p> <ul style="list-style-type: none"> • <i>Ratio of general operating support to project support improved by 10 percentage points</i> • <i>3 new foundation funders actively prospected annually</i> • <i>Broader individual giving campaign for Alliance implemented and maintained</i> • <i>Reserve maintained at 3 months operating expenses</i>

<p>Sector Leadership:</p> <ul style="list-style-type: none"> • Pursue strategic alliances both inside and outside sector • Convene cultural service organizations on regular basis to maximize collective impact and efficiency • Through strategic filter, annually evaluate programs for termination and consider building expiration/termination dates into new programs) • Commit to professional development that ensures ongoing investment in all staff and which improves communications, effectiveness and morale • Diversify Cultural Alliance staff and board to reflect the demographics of the region 	<p>Sector Leadership:</p> <ul style="list-style-type: none"> • New strategic filter used annually in operating plan process to align scope of work with available resources. Cuts made where necessary to ensure positive working capital contribution. • Alliance staff serve on 3 cross-sector boards • One major strategic alliance completed and documented with transparency as model for field • One cultural service convening held annually • One development opportunity/year included in each employee work plan • Diversity goals affirmed annually in hiring and nominating processes and reflective balance in both staff and board achieved
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OUTCOMES	MEASURES OF OUTCOMES
<p>How the sector will be different:</p> <ul style="list-style-type: none"> • Cultural sector entities are healthy, using adaptive practices, exploring and operating under new models, demonstrating strategic alliances and consolidation • Cultural audiences are representative of the demographics of the region • Cultural sector integrated into broad civic issues and planning efforts • Philanthropy increases for cultural sector <p>How the Alliance will be different:</p> <ul style="list-style-type: none"> • Alliance is seen as broad opinion leader • Alliance is healthy, using adaptive practices, exploring and operating under new models, demonstrating strategic alliances and consolidation • Alliance membership is reflective of the sector as a whole <p>How Philadelphia will be different:</p> <ul style="list-style-type: none"> • Citizens and visitors broadly seek cultural experiences • Businesses locate in the Philadelphia region because of cultural sector • People move to and stay in the Philadelphia region because of cultural sector • The Region is known for its thriving cultural community and creative professionals want to be here 	<p>Sector measures:</p> <ul style="list-style-type: none"> • Attendance and cultural engagement rise (CDP & CEI measures) • Diversity of cultural participants increases • Cultural representatives exert influence, contribute to the agenda of, and define civic goals • Aggregate giving to the cultural sector increases (CDP measure) <p>Policy/Advocacy measures:</p> <ul style="list-style-type: none"> • Alliance has advocacy partners from other sectors • Culture has visible civic champion from outside the sector • Legislators hear from a broader constituency than cultural leaders • Cultural organizations appear in media related to non-culture issues • Community leaders tap and invest in cultural orgs to address community goals <p>Alliance health measures:</p> <ul style="list-style-type: none"> • Alliance demonstrates optimal use of resources through alliances and consolidation • Alliance membership is more diverse (types of entities) • Alliance generates positive working capital <p>Philadelphia region measures:</p> <ul style="list-style-type: none"> • Businesses, residents and visitors cite the cultural sector as a feature of the region that attracted them here • The number of artists, cultural and other creative professionals in the region increases • Media talks about Philadelphia as an attractive destination for travel

**Greater Philadelphia Cultural Alliance
Strategic Plan, 2012-2016
Dashboard**

The Alliance’s management dashboard will ensure continuous focus on key metrics associated with our Logic Model, these include:

<p>Cultural attendance and engagement rise (CEI & CDP measures)</p>	<p>Aggregate giving to the cultural sector increases (CDP measure)</p>	<p>Alliance membership is more diverse (types of entities)</p>	<p>Alliance generates positive working capital</p>	<p>The number of artists, cultural and other creative professionals in the region increases</p>
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