



CANADIAN
ARTS PRESENTING
ASSOCIATION

STRATEGIC PLANNING FRAMEWORK AND DIRECTIONS

Executive Summary

The Canadian Arts Presenting Association/l'Association canadienne des organismes artistiques) has, in 2011, undertaken a strategic planning process focussed on organizational development, under the guidance of a consultant.¹ This document, "Strategic Planning Framework and Directions", is the short-term result of this process and proposes important elements of CAPACOA's development in the next three years, to strengthen the association's ability to broaden the diversity of its membership base while focusing and prioritizing services.² This document is based on broad consultation with CAPACOA's current members, Board members and staff, potential members and funders, as well as in-depth online and offline research and analysis of secondary data. It also considers selected strategic planning practices of similar associations and networks in the field of the performing arts and beyond.

The **main aims** of the strategic planning process are: to analyze the level of motivation and satisfaction of the membership regarding CAPACOA's national mandate and current provision of services, to review its current membership structure and dues, and to propose a strategic framework and a set of objectives and directions for further development, in order to strengthen the organization's capacity and increase efficiency of services and programming within a sustainable framework. The complete document also integrates key elements of the CAPACOA Communications Strategy.³ It consists of two main parts and 11 appendices:

- **Part I:** Situational analysis, based on the research conducted, in-depth interviews and online survey.
- **Part II:** Proposed Strategic framework and directions for further development, resulting from the collective consulting process and research conducted.

Methodology and approach

The study's methodology considers the current stage of CAPACOA's development and consists of the following **main methods**:

- **Literature review** (secondary data): content analysis of internal and external documents, articles, reports, papers and online resources related to the current study.
- **Focused in-depth interviews** with 31 individuals: 14 Board members, 4 members, 6 non-members, 2 funders, CAPACOA staff and an external communications consultant. The interviews were based on a questionnaire, with slight modifications depending on the profile of the interviewees, and were conducted on a one-to-one basis or in groups. The interviews identified and shaped the areas on which the online survey questionnaire was elaborated.

¹ With funding from the Canada Council for the Arts, CAPACOA hired strategic consultant **Dr. Lidia Varbanova** (www.lidiavarbanova.ca). The study was assisted by **Dr. Nancy Duxbury**, researcher.

² The results of the major study *The Value of Presenting: A Study of Arts Presentation in Canada* (www.diffusionartspresenting.ca), to be completed in 2013, might shape the focus and the strategic directions of CAPACOA's further development. A second and more comprehensive strategic planning process will take place in three to four years' time, assimilating new information and responding to analysis and recommendations from this study.

³ A *Three-Year Communications Strategy for CAPACOA* was prepared by Laura Denker, June 2011.

- **Online survey of CAPACOA members:** The online survey was based on 12 main questions - 90% of them were of an open-type with ready-made multiple choices as well as options for open-ended comments.⁴ 29% of CAPACOA members took part in the online survey, completing it in full. The profile of the survey participants was: 57% Presenters, 36% Network members, 5% Business members and 2% Other types of members.

All survey responses and the interviews were summarized and analyzed, while remaining anonymous. The overall number of CAPACOA members participating in the interviews and the online survey was 62, representing 41% of the membership.

- **Online research and comparative analysis of similar cases:** A sample of associations and networks in Canada and internationally (USA and Europe) was reviewed in terms of elements of strategic planning. The selection of associations/networks was based on suggestions from CAPACOA members. Five personal interviews with the Executive staff of selected international networks were conducted.

Part I: Main findings and proposed solutions

The study covered four **key areas**: CAPACOA's mission and mandate, membership and services, visibility and outreach, and a sustainable financial model. The results of the study shaped the **key directions and proposed solutions to identified problems and gaps**, as follows:

A. Sustain the national mandate

Interviewees described CAPACOA's mandate and the mission of the association mainly with the following keywords: "networking," "advocacy/arts promotion," "professional development and advancement," and "setting professional standards in the field." The majority of survey respondents consider CAPACOA as "a place for networking, dissemination and the exchange of knowledge and best practices," a "catalyzing network of networks," and as being "the national voice for the sector." The study confirmed the three key points of CAPACOA's uniqueness on a national level: to bring arts presenting issues to the Canadian cultural policy agenda by initiating research and through other means, to provide the "national perspective" in contrast to regional ones, and to build and inspire the diverse community of performing arts presenters from coast to coast to coast and facilitate conversations between members.

B. Focus and prioritize

More than half of the online survey respondents believe that "CAPACOA fulfils its national mandate very effectively" or "somewhat effectively" (58.8%). A challenge for CAPACOA is the difficulty of being "all things to all people and organizations" (64%). CAPACOA is viewed differently by different types of members: network members see it as an advocacy and networking organization, while business members consider it a facilitator in the marketplace. A focusing strategy is preferable for CAPACOA than one of diversification owing to limited staff and resources. CAPACOA needs to continue to refine its services to match the needs of its key target groups: business members, not-for-profit members (including networks), and individual presenters.

C. Promote programs and services

CAPACOA's current service provision is in five main areas: arts promotion/advocacy, networking, professional development, research and development, and a group of "other services." Members seem to be most satisfied by: the annual conference, advocacy/arts promotion work and news, the annual national network meeting, the *All Access* newsletter, and online communication. Several key services are neither currently used nor known by members. There is a need to promote all current programs more efficiently among members

⁴ The survey was developed in English and French and used SurveyMonkey web-based software.

and to articulate better their added value in light of members' daily needs and future expectations. The association should balance its service offer both online and offline.

D. Knowledge transfer and exchange

Part of CAPACOA's service provision should continue to be oriented towards the transfer of knowledge between experienced and emerging professionals in the field. The added value of the association is much higher for emerging presenters who are new in the field. CAPACOA should continue to develop and empower the next generation of arts presenters and build bridges between emerging and experienced presenters from diverse geographic regions of the country. *This is an important part of the association's uniqueness.*

E. Simplify membership structure

40.4% of online survey respondents were "neutral" on the question of the efficiency of the current membership structure, 19.4% did not have an opinion, and 10.6% answered that it is "somewhat efficient." CAPACOA needs to pursue a membership strategy in which increasing diversity is met and membership dues are not increased further.

F. From networking to empowering

Almost all CAPACOA members involved in the survey and the interviews emphasized the following main motivations to join CAPACOA: "to network professionally with other colleagues," "to be part of the national voice in the performing arts presenting sector in Canada," and "to stay updated and informed about new developments." The survey confirmed that 90% of respondents are willing to contribute and give back to the arts presenting community. CAPACOA is a national network as well as a service organization and therefore members should be actively engaged. Its communication messages need to empower and catalyze the membership to actively contribute to the association.

G. Further growth

CAPACOA currently represents less than 15% of the performing arts presenting and touring sector and there is much potential for future growth. One of CAPACOA's main strategic goals should be to increase its membership through the active involvement of members and Board members as "ambassadors" to bring in new members. More than half of the online survey respondents suggested that direct personal interactions during events as well as personalized invitations by telephone and email are the most efficient communications methods to increase membership. CAPACOA needs to be even more present at targeted provincial and local events organized by regional networks and partners.

H. Visibility and outreach

The study confirms that it is important, but not critical, for CAPACOA to have a public profile at its current stage of development. One third of survey respondents answered that it is "somewhat important" for CAPACOA to be publicly visible to promote the role and the importance of arts presenting better as a profession. The association should concentrate its resources and efforts on being well known among professional circles before going public on a wider scale. Through close collaboration with regional networks, CAPACOA needs to increase its visibility in under-represented regions and among aboriginal communities, immigrant communities and other minority groups. At a next stage of development, CAPACOA needs to open up internationally and explore collaborations with international networks.

I. Alternative sources of funding

Currently, CAPACOA's main revenue sources come from: government support (36.5% federal and 19.6% provincial), the annual conference (21.25%), and membership dues (14.5%). CAPACOA needs to further explore alternative sources of funding, both online and offline.

Part II: Proposed Strategic framework

CAPACOA envisions a world where live performing arts in all forms are essential to the quality of life of our society and the performing arts touring and presenting community has the power to be a catalyst in integrating performing arts activity in all communities and to all audiences. CAPACOA believes that arts presenters have artistic, social, educational, economic and political roles to play, and the association facilitates and reflects all of these.

It is proposed that CAPACOA's strategic goals include the following **value statements**:

- **Empower and engage membership**: not only bringing the members together to connect, collaborate and exchange, but helping them to articulate stronger policy arguments and incorporate their work into their local communities.
- **Knowledge exchange**: developing new competencies and skills of members, fostering innovation, and building bridges between experienced and emerging arts presenters.
- **Diversity of membership**: expanding the principle of inclusiveness and openness, while staying focused on the performing arts touring and presenting community across Canada.
- **Map and disseminate leading practices in the field across Canada**: recognizing the achievements of its members and working for their dissemination and their visibility.

Proposed Strategic Goals

A. Promote the value and importance of performing arts presenting

CAPACOA provides the context of a “unified voice” for the field, speaks on behalf of its membership in policy matters, and helps members make the case for the performing arts among local and regional stakeholders. The association raises awareness and understanding of the presenter's role in the performing arts industry among the public. CAPACOA engages in or supports research projects that can generate new perspectives on the presentation of the performing arts.

B. Reinforce and empower networking in a dynamic collaborative environment

CAPACOA acts as a “network of networks,” as a “pan-Canadian platform” bringing together networks, organizations, and individual members in the arts presenting field. The association promotes and disseminates members' activities and achievements, and facilitates members' access to new networking opportunities locally, nationally, and internationally.

C. Endorse professionalism in the field and facilitate information dissemination

CAPACOA facilitates professional development in the arts presenting field in all its forms by following trends, developments, and innovations and providing updated information to members. The association works for equal, favourable working conditions for performing arts presenters across the country. In cooperation with regional networks and partners, CAPACOA identifies training needs and works to establish professional standards in the sector.

D. Stimulate capacity building, knowledge exchange, and innovation

CAPACOA facilitates the transfer of knowledge and competencies between the experienced generation of arts presenters and the new generation. The association assists in the exchange of innovative models and practices in the field. CAPACOA stimulates a learning environment and acts as a catalyst for other networks to elaborate capacity building programs and projects in their region so that arts presenters are more effective in their daily practices and in their connections with their local communities.

E. Grow and diversify membership

CAPACOA aims at increasing and diversifying membership (culturally, geographically, and by type). Target groups for outreach are the touring sector and individual arts presenters, business members, and regional networks. In collaboration with regional networks and partners, CAPACOA addresses the importance of collaboration with under-represented groups of professionals and organizations in the field through encouraging members' diverse programs and projects.

Proposed Operational Goals

(Principles of management and operations: Openness; Inclusiveness; Transparency; Outreach; Focusing; Participation; Excellence and Professionalism at work).

A. Membership structure and engagement

- Pursue a membership structure which facilitates CAPACOA's growth strategy.
- Continue working towards a dynamic membership environment.

B. Membership benefits and programs

- Continue focusing and prioritizing services by making selective strategic choices.
- Consider implementation of new offers and benefits for members in line with strategic goals.

C. Communications

- Incorporate CAPACOA's key communications messages – Advocate, Empower, Innovate – in promotional tools.
- Select and prioritize tools for communication with members, drawn from the Communications Strategy.

D. Sustainable model (partnership, finances, and governance)

- Diversify sources of funding and seek opportunities for alternative financing outside of government support and membership dues.
- Maintain geographic, cultural, gender, and linguistic balance in the Board's composition.