

**Crooked Tree Arts Center**  
Petoskey and Traverse City  
Strategic Plan 2014-2019

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## **Our Mission**

Crooked Tree Arts Center  
Inspiring and enriching lives through the arts

## **Our Vision**

- Become a nationally recognized center for arts and culture
- Expand our community reach to provide a sense of connection and place to Northern Michigan for residents and visitors
- Create a financially stable and self-sustaining organization to support continued growth

## **Broad Objectives**

1. Expand Breadth & Depth of Programming
2. Expand Scope of Outreach & Participation
3. Assure Financial Stability to Fund Growth & Sustainability
4. Recruit, Develop & Retain Exemplary Board Members, Staff & Volunteers
5. Improve Operational Efficiency & Effectiveness

## 1. Expand Breadth & Depth of Programming

Supporting Strategies	Action Plans	Primary Responsibility	Completion Date
<b>Develop national caliber events &amp; programs</b>	<ul style="list-style-type: none"> <li>• VA: Host a Nationally recognized Visual Arts event every third year.                             <ul style="list-style-type: none"> <li>○ ANSEL ADAMS AND AM IMPRESSIONIST Exhibits and events</li> <li>○ TC: National Plein Air 3 day event</li> </ul> </li> </ul>	Staff, VA Committee Geiger & Pollie Ad Hoc	Summer 2017 and 2019  TC: 2019
	<ul style="list-style-type: none"> <li>• PA: Schedule nationally recognized performers.                             <ul style="list-style-type: none"> <li>○ Major performer every 3 years?</li> </ul> </li> </ul>	Hume, PA Committee	2015 TC 2016 PET
	<ul style="list-style-type: none"> <li>• ED: Attract &amp; offer educational opportunities from nationally known &amp; recognized instructors.</li> </ul>	DeWindt, TC Staff, ED Committee	2015 in TC and Pet 2016
	<ul style="list-style-type: none"> <li>• TC                             <ul style="list-style-type: none"> <li>○ Identify gaps in community PA and Ed that CTAC could fill</li> <li>○ Create &amp; maintain relationships &amp; education opportunities with national associations &amp; organizations</li> <li>○ Develop &amp; create one wish list of suggestions from members &amp; community; target a few each year for offering</li> <li>○ Survey local artists for subjects/artists</li> </ul> </li> </ul>	Ahrens/Kelto & ED Committee	
	<ul style="list-style-type: none"> <li>• ED: Establish artist residency program                             <ul style="list-style-type: none"> <li>○ In Good Hart 2014-16</li> </ul> </li> </ul>	Kelto, DeWindt, Ahrens, ED Com	Execute first series in 2017

<p><b>Develop lecture series beyond Coffee @ Ten</b></p>	<ul style="list-style-type: none"> <li>• Develop concept for initial 2016 research <ul style="list-style-type: none"> <li>○ Investigate internet streaming</li> <li>○ Artist in Action demo series?</li> </ul> </li> </ul>	<p>ED Committee, staff</p>	
<p><b>Develop balanced Performing Arts series (Petoskey)</b></p>	<ul style="list-style-type: none"> <li>• Evaluate multiple performance scheduling</li> <li>• Book headliners, affiliation fans &amp; family series</li> <li>• Increase # of performances in series (expand series)</li> <li>• Summer series consistent with CTAC summer programming</li> </ul>	<p>Hume, PA Committee</p>	<p>Ongoing</p>
<p><b>Develop balanced Education program</b></p>	<ul style="list-style-type: none"> <li>• Create more dynamic &amp; engaging classes/ shorter workshops schedule &amp; offerings from audience surveys</li> <li>• Create class structures/ semesters/topics that include team teaching</li> <li>• Evaluate &amp; review success of overall educational programs; whether financial or mission driven events</li> <li>• Poll area residents as to children’s summer needs; develop programs accordingly</li> </ul>	<p>DeWindt, Kelto TC Staff, ED Committee</p>	<p>Ongoing</p>
<p><b>Develop balanced Education program</b></p>	<ul style="list-style-type: none"> <li>• Investigate Osher Learning, other life long learning</li> <li>• Create a Parent Advisory Board to meet once a year.</li> </ul>	<p>ED Committee, CTAC Staff, new volunteers</p> <p>Ryner</p>	<p>2017</p> <p>2016?</p>

<p><b>Evaluate all programs &amp; events on an ongoing basis</b></p>	<ul style="list-style-type: none"> <li>• Develop program/event screening checklist and evaluation tool</li> <li>• Guideline: What opportunities for funding? Cross Promotion? Volunteers and Membership?</li> <li>• Identify &amp; create opportunities for greater benefits to Arts Center members</li> </ul>	<p>ED &amp; CTAC Staff</p> <p>Ahrens/Committees</p>	<p>4/1/15 2016</p> <p>Ongoing</p>
<p><b>Facility expansion</b></p>	<ul style="list-style-type: none"> <li>• Update &amp; renovate theater systems and seating</li> <li>• Research project costs; request funding; implement capital improvements</li> </ul>	<p>Development Committee</p> <p>Ahrens</p>	<p>Plan 3/31/15 June 2015</p> <p>Fundraising 2016</p> <p>Execute 2017</p> <p>Fall 2014 X</p> <p>See report Kitchen first need</p>
<p><b>Improve utilization of existing CTAC space</b></p>	<ul style="list-style-type: none"> <li>• Create PA programming that utilizes our own space as much as possible</li> <li>• Survey current instructors as to space improvements &amp; limitations in their areas of instruction (i.e., pottery studio ventilation, music studios/string rehearsal) &amp; hoped for future expansion; create wish lists &amp; action opportunities for funding/sponsorships</li> </ul>	<p>Hume, PA Committee</p> <p>Hume, PA Committee</p> <p>DeWindt, ED Committee</p> <p>DeWindt, ED Committee</p>	<p>8/1/14 X</p> <p>3/31/15</p> <p>9/01/2015</p> <p>3/31/15X</p>
<p><b>TC Location</b></p>	<p>Work with City of TC to extend lease beyond 2018</p>	<p>Ahrens</p>	<p>Spring 2016</p>

**2. Expand Scope of Outreach & Participation**  
**Geographic Expansion, Demographic Diversity, Attendance/Market Participation**

<p><b>Develop comprehensive marketing plan</b></p>	<ul style="list-style-type: none"> <li>• Identify volunteer consultant to assist with Committee marketing plan development</li> </ul>	<p>Ahrens/CTAC staff</p>	<p>1/1/2016</p>
	<ul style="list-style-type: none"> <li>• Marketing plan completion               <ul style="list-style-type: none"> <li>○ Identify &amp; develop cohesive social media campaigns</li> <li>○ Identify &amp; leverage additional announcement opportunities to share Arts Center &amp; PA message</li> <li>○ Identify &amp; create targeted PR events/marketing materials to reach broader community</li> <li>○ Cross promote opportunities with external renters/representative and marketing materials at all events</li> <li>○ Cross promote opportunities with area associations/ organizations</li> <li>○ Generate “word of mouth”; create &amp; maintain database of possible cross promotion opportunities</li> </ul> </li> </ul>	<p>Kelto Ahrens Ahrens</p>	<p>4/1/15 1/1/2016</p>
		<p>Hume PA/ED Committees</p>	
		<p>Ahrens/CTAC Staff</p>	
<p><b>Identify community needs &amp; interests</b></p>	<ul style="list-style-type: none"> <li>• Post Mission Statement in lobby</li> <li>• Develop 1 or 2 special events open to targeted groups</li> <li>• Surveys: programs; e-blasts; postcard size to hand out at other events (internal &amp; external – Swirl, Exhibit openings, etc.)</li> </ul>	<p>Ahrens (marketing plan to define)</p>	<p>9/1/14X 8/31/14</p>
		<p>Ahrens</p>	<p>6/1/14 X 6/1/2015</p>
		<p>Staff/Development</p>	
		<p>DeWindt/CTAC Staff</p>	<p>9/30/14 9/30-2015</p>

<p><b>Utilize space in other communities as programming expands</b></p> <p><b><u>(TC Merger met this goal)</u></b></p>	<ul style="list-style-type: none"> <li>• Identify communities/spaces appropriate to PA productions</li> <li>• Book performances into identified community spaces</li> <li>• Identify communities/spaces appropriate for ED programs TC</li> <li>• Create surveys/questions group to identify current roadblocks for student attendance – adult &amp; youth</li> </ul>	PA Committee	9/1/14 X
		PA Committee	9/30/14 X
		ED Committee	3/31/15 X
		ED Committee	3/31/15
<p><b>Initiate new community VA projects to further reach across northern Michigan</b></p>	<ul style="list-style-type: none"> <li>• Extend summer Exhibit partnerships across northern Michigan businesses</li> <li>• Launch Teenage Community Improvement Visual Art Project....potential scholarship</li> <li>• Identify “Cross Reach” Summer 2017 Art Event with other northern Michigan art organizations</li> </ul>	<p>VA Committee, McSurely</p> <p>Ahrens, VA Volunteer</p> <p>VA Committee, Geiger/Pollie</p>	<p>Menu by 1/15/15 X March 2015 12/31/14 X</p> <p>Firm plan by 2/1/15 2016</p>

**3. Assure Financial Stability to fund Growth & Stability:  
 Endowment Fund Goal: 5yr \$7M, 10yr \$25M  
 Annual Budget Goal: 5yr \$3M, 10yr \$5M**

<b>Supporting Strategies</b>	<b>Action Plans</b>	<b>Primary Responsibility</b>	<b>Completion Date</b>
<b>Retire/refinance building loan (mortgage note due in 2016)</b>	<ul style="list-style-type: none"> <li>Conduct capital campaign to retire debt on building or refinance</li> </ul>	DEV Committee, FIN Committee	2015 X
<b>Formalize Planned giving program</b>	<ul style="list-style-type: none"> <li>Define/Describe various planned giving programs &amp; alternatives</li> </ul>	McSurely, DEV Committee, Streit/Shrier	9/1/14 In progress
<b>Improved donor management</b>	<ul style="list-style-type: none"> <li>Implement “Active” donor management system</li> </ul>	McSurely, Blythe, Hume	1/1/15 Dec 2014 X ongoing
<b>Engage donors in finalization of strategic plan</b>	<ul style="list-style-type: none"> <li>Develop a refined &amp; condensed strategic plan presentation for use in connecting our vision to fundraising including Program Campaign</li> </ul>	Ahrens	5/1/14 In progress
<b>Identify &amp; actively pursue grant funding possibilities</b>	<ul style="list-style-type: none"> <li>Train committee in grant identification and proposal writing</li> <li>Encourage interested committee members to attend external grant proposal writing seminars</li> </ul>		12/31/15
<b>Identify &amp; create programming sponsorship menu of opportunities to support &amp; underwrite</b>	<ul style="list-style-type: none"> <li>Invite staff Development Director to train PA committee on how to ask &amp; best practice protocol for Arts Center to avoid donor burnout</li> <li>Create a standalone Fundraising event benefiting PA Series</li> <li>Review event &amp; program pricing to achieve a break-even programming budget (overall)</li> <li>Research &amp; create dynamic ticket pricing plans/discounts</li> </ul>	McSurely McSurely Dev/PA/ED/VA Committees PA Committee Each Committee	2/28/15 3/31/2015X 2/28/15 3/31/17 Ongoing



#### 4. Recruit, Develop & Retain Exemplary Board Members, Staff & Volunteers

Supporting Strategies	Action Plans	Primary Responsibility	Completion Date
<b>Improve Board engagement &amp; participation</b>	<ul style="list-style-type: none"> <li>Refine Board invitation/orientation package &amp; conduct periodic orientation meetings</li> <li>Revise Board agenda &amp; content (policy, new programs, issues)</li> </ul>	Board Chair	7/1/14; Qtrly
		Ahrens, Board Chair	7/1/14
<b>Implement staff performance management system</b>	<ul style="list-style-type: none"> <li>Design performance management system &amp; establish performance accountability</li> <li>Define career development plans &amp; objectives for senior staff positions professional development</li> <li>Develop succession plans for senior staff positions</li> <li>Publish new staff announcements in quarterly CTAC publications/website/eblasts</li> </ul>	Ryner Expert in field	2016
		Ryner/Ahrens	4/15X
		Ryner/Ahrens	Ongoing X summer 2015 newsletter
<b>Improve volunteer engagement &amp; participation</b>	<ul style="list-style-type: none"> <li>Conduct biannual "New Volunteer" orientation program</li> <li>Publish volunteer request schedule</li> <li>Solicit/compile information on unique volunteer skillsets &amp; work preferences</li> </ul>	McSurely/Kelto	10/1/14
		DeWindt	4/1/14, updated monthly X 7/1/14
<b>Create, recruit &amp; maintain volunteer database (i.e., culinary hosts, workshop hosts, etc.) and track performance of non-committee members</b>	<ul style="list-style-type: none"> <li>Create &amp; maintain database Press release/web presence of volunteer opportunities</li> </ul>	Dailey, DeWindt	3/31/15
<b>Establish permanently ongoing Community Advisory Committees in TC and Petoskey</b>	<ul style="list-style-type: none"> <li>Determine roles, responsibilities, and expectations for CAC members. Identify initial participants</li> </ul>		

## 5. Improve Operational Efficiency & Effectiveness

Supporting Strategies	Action Plans	Primary Responsibility	Completion Date
<b>Improve Committee communication &amp; collaboration</b>	<ul style="list-style-type: none"> <li>• Prepare written Committee charters</li> <li>• Create new committee meeting template</li> </ul>	Committee Chairs	4/1/14 X
		CTAC Staff	5/1/14 in progress
<b>Design &amp; implement improved financial reporting</b>	<ul style="list-style-type: none"> <li>• Key Indicators Dashboard</li> <li>• Cash flow statements</li> <li>• Monthly financial statements</li> <li>• Event/program financial analysis</li> </ul>	Hume/ McAndrew	4/15/14 X
		CTAC Staff, VA Committee	3/31/15 Fall/Winter 2015 (2 Summer 2016)
<b>Staff/Organize committees for more capacity</b>	<ul style="list-style-type: none"> <li>• Increase committee membership/leadership to include volunteer led standing committees</li> <li>• VA: Develop summer docent &amp; intern program</li> </ul>		Select 5/1/14 X Dec 2014 Implement 1/15/15
<b>Streamline class registration process</b>	<ul style="list-style-type: none"> <li>• Implement "Active" software to perform registration</li> </ul>	Blythe, Dailey, DeWindt, Hume	2016
<b>Update Bylaws</b>	<ul style="list-style-type: none"> <li>• Complete Review of bylaws</li> </ul>	Kimmell, Ahrens	
<b>Develop Board and CAC bios to identify and communicate specialized skills inventory</b>		Ahrens	2016