



Dayton Society of Artists
STRATEGY + PLANNING
PROCESS REPORT
SEPTEMBER 2022

Strategic Aspiration:

DSA is inspiring and nurturing community and fostering the artistic spirit of artists and art lovers in the Miami Valley.

Mission:

The mission of the Dayton Society of Artists is to connect, support, and educate artists and the community.

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“A Revolution in Business Management”

A revolution has begun that promises to change everything we believe and what's possible in the business world. It began with the discoveries, at the end of the last century, that were made in the fields of science including chaos, complexity, and quantum theories that have brought breakthrough innovations to business systems and processes.

These three theories have contributed in helping understand how things work in our universe and their application to business strategy and human behavior are having a profound effect on those organizations that are embracing and applying their principles.

These theories cover the entire breadth of the organizational management landscape.

As we move through the 21st century and beyond, the effect of discoveries will become more pervasive and will affect every field of human endeavor. The rapidly developing technological advancements and globalization will accelerate the unfolding transformation that's only beginning.

And the field of business in general will be impacted in every functional area of the organization. One area in particular that's already seeing change is how we are beginning to view strategic planning in a new light. The Jael Group understands that it's difficult, and can be socially perilous, to question an established strategic planning model like SWOT (strengths, weaknesses, opportunities, threats) that many people believe, and then start building a new model like Strategy + SOAR Planning; but gone are the days of simply creating strategic plans using 20th century thinking that end up on a shelf collecting dust.

-Published article by The Jael Group



Summary:

Nine (9) Dayton Society of Artists (DSA) stakeholders assembled on September 24 & 25, 2022 to develop a strategy plan of action that identifies what the organization will need to become, and steps to take in order to deliver on the Strategic Aspiration that was created during the two day planning session.

The stakeholders that participated on the planning team were made up of eight women and one gentleman, all acting members of DSA: **Jo Bell, Matt Cary, Mikee Huber, Maria McGinnis, Marsha Pippenger, Julie Riley, Yetunde Rodriguez, Laurie Westheimer, Elizabeth Wetterstroem.**

This planning team, together completed the Strategy + SOAR planning process and established the organizations “Strategic Aspiration” and designed the top strategic goals to be initiated in order of priority. This written Planning Session Report outlines the collaborative and concise ideas of the group; including the first three selected strategic goals the organization wants to accomplish.

DSA’s strategic plan is a ‘living document’ that is designed to move the organization through the process of not only achieving the outcomes that the planning team has selected, but it will also help the organization course correct along the way. Each strategic goal will be led by a volunteer champion who will report on the progress during board meetings, Action Team meetings and staff meetings.

The planning team learned while working through the planning system that the success for the organization will not be the “plan” itself, but in the “process” that the planning team went through together over the two-day period to create it and the execution it will take to accomplish it. By learning this “system”, it allows the planning team members to use this methodology over and over again (evergreen) as the organization continues to reach their stated outcomes long term.

Methodology:

The Jael Group created a customized strategy + planning program for the Dayton Society of Artists using information gathered at the “Discover Analysis Meeting” via Zoom with the DSA Planning Design Team (**Jo Bell, Mikee Huber, Carol Lundin, Marsha Pippenger** and **Laurie Westheimer**); along with additional research findings. The strategic planning sessions included module design that stepped through four strategy development phases and the Strengths, Opportunities Aspiration, Result (SOAR) planning process for implementation of DSA’s future programs, events, operational processes and course correction.

The two day format allowed the DSA planning team to stay in a high performing, creative energy state.

A two-person strategist-facilitation team was provided over two consecutive half days. The two day format allowed the DSA planning team to stay in a high performing, creative energy state. By using a two-person facilitation team, it brought different skillsets and approaches to the facilitation process. The Jael Group Strategic Advisers asked generative questions that guided the DSA team to even better answers, and they will develop action plans around the answers that they came up with as a team during the execution implementation stage.

The Jael Group Strategy + Planning Program for Organizations is uniquely designed to “*engage the individual*” so they are able to contribute at their highest level, which strengthens the group work. This was physically done by working with the Executive Director, **Jo Bell** to provide the planning team with hydration drinks, nutritional food breaks and breathing exercises. The DSA team was asked to discover their personal “Whys” which outlined their reasons for contributing to the organization, as well as identifying “why” the organization needs to continue to exist. Both reasons/answers helped to articulate the new DSA Strategic Aspiration.

In preparation, DSA’s planning team completed a four day strategic planning prep week. Prep-Week is designed to build capacity prior to starting the strategy + planning session. It develops awareness around metacognitive thinking, empathy towards people and ideas, and increases creativity beyond-the-box idea development. This was done with prep documentation, videos, and survey questionnaires.

Each planning team stakeholder brought to the first session a list of pre-thought-out ideas of “Strategic Possibilities”.

This entire methodology process sets the planning team up to work from a positive possibility perspective; and the fruits of this process create an organization that will flourish and be sustainable well into the future.



**[This planning session helped us]
“Become organized with project
management and get rid of the
rear view mirror!”
- Julie R.**



**“I really liked the concept of
asking ‘why’ for determining what
goals and strategies to focus in”
-Matt C.**



DSA'S STRATEGY PROCESS | Phase 1:

The essentials of strategy are about making choices. The goal is to develop strategic choices that guide productive action. Strategy is not complex. But it is hard because it forces people and organizations to make *specific* choices about their future.

To develop the right strategy the DSA planning team broke up into three (3) groups and discussed their Strategic Possibilities (a happy story that describes how an organization succeeds). Each team wrote down as many *imaginative* possibilities that they believed DSA could execute to become the organization they "need to be".

"Learn to say NO to the good, so you can say YES to the best."

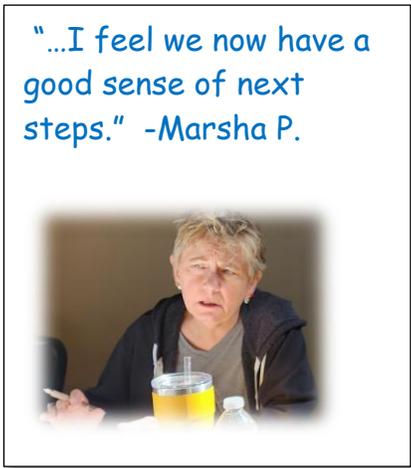
The team was instructed to make a Rubicon decision that they would not move away from; understanding that there are consequences when you 'learn to say *NO to the good, so you can say YES to the best*'. The entire planning team selected their top strategic possibilities from each group to be considered for DSA's "Strategic Aspiration" statement.

Strategic Aspirations are the choices made to inspire, motivate, and create expectations about the future. The team moved from Strategic Possibilities to selecting a Strategic Aspiration, by answering the following questions about each possibility:

- 1) Can it be linked to an inspiring, attractive appealing aspiration?
- 2) Can we create a system that would need to be in place to support the necessary capabilities?
- 3) What are our "must haves" vs "nice to have"?

Strategic Possibilities → To ONE Strategic Aspiration | Planning Team Ideas:

To inspire and nurture the artistic spirit of local emerging and experienced artists in the Miami Valley by providing opportunities for innovative experiences, catalyzing relationships between artist and arts supporters and serving the local arts community in Greater Dayton
To inspire & nurture a communal artistic spirit in the art lovers of the Miami Valley.
Bring our members together in a mutually beneficial mentor program / Engage college students in DSA's activities.
To be a community that inspires and nurtures the artistic spirit of art lovers in your Miami valley
To inspire & nurture an artistic spirit in our community of artists and art lovers in the MV
**TEAM NOTE: We need to use “active” action words, present tense.



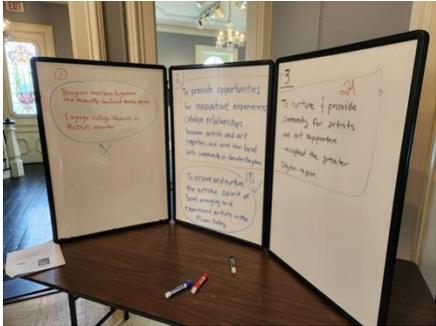
Make the choice: The planning teams choice became the Strategic Aspiration (or Strategic Direction). An organization’s Strategic Aspiration is their choice on how they’re going to show up in the market place. It answers the Who, What, Where, and Why.

DSA’s Strategic Aspiration:

“DSA is inspiring and nurturing community and fostering the artistic spirit of artists and art lovers in the Miami Valley”.

The team generated a list of conditions that defines success for DSA - For each possibility, the group asked the following questions:

- 1) If these conditions were shown to hold true, would we choose this possibility? If not,
- 2) What additional conditions would/should we include?



The aim here was to enumerate all the conditions that need to hold true for everyone in the room to be able to honestly say, *“I feel confident enough to make this possibility a reality aspiration”*. The conditions needed to be expressed as declarative rather than conditional statements.

CONDITIONS [That make our Strategic Aspiration true]

“DSA is inspiring and nurturing community and fostering the artistic spirit of artists and art lovers in the Miami Valley.”

*Funding	*Administration
*People -members, -supporters, -volunteers, etc. a recruiting process	*Management systems -training
*Community Awareness	*Research
*Supplies	*Execution of Strategic Plan
*Professional Knowledge/Experience -Accounting -Legal -Marketing	*Board Development -New member welcome packet/orientation
*Volunteer Engagement	*Standard Operating Procedures (SOPs) or Statement of Work (SOW for contractors)





DSA S.O.A.R. PLANNING PROCESS | Phase 2:

STRENGTHS: What strengths do we possess or need to acquire that will enable us to make our Strategic Aspiration a reality? Can we reasonably build the capabilities that are necessary to succeed where we would play? **Answers:**

- Financial resources/fundraising, Management operation & tracking systems, Membership recruiting & engagement, Telling our story, Board Development, Training, Program development
- “Yes!”

OPPORTUNITY: Where will we play? Which gaps could the organization fill in the market? Which collaborations could increase the chance of success? **Answers:**

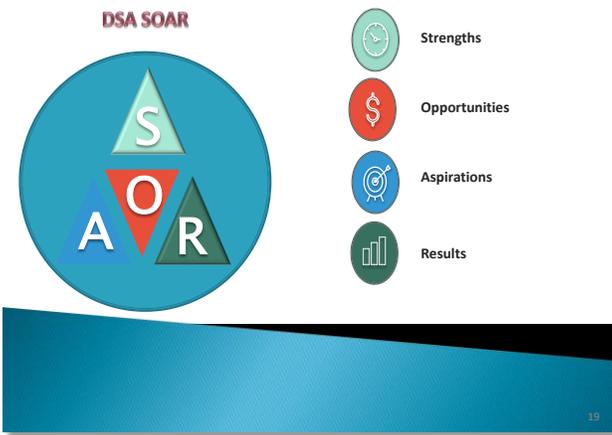
- The Miami Valley
- Be a “members focused” organization
- Corporate sponsors program, other likeminded organizations,

ASPIRATIONS – DSA’s Strategic Aspiration is the passion of the organization. With their strategic aspiration in mind, the organization made a list of the goals they want to achieve in the future that makes their aspiration true. The planning team listed the conditions and capabilities that must be in place to achieve the aspiration. **Answers:**

- “*DSA is inspiring and nurturing community and fostering the artistic spirit of artists and art lovers in the Miami Valley*”.

RESULTS - How does the organization track progress and measure success? How does the organization translate the vision of success into tangible results? **Answers:**

- Complete DSA’s first priority strategic goal to research and onboard DSA’s Management & tracking system(s) and functional areas SOP’s (Standard operating procedures).
- Check off “Conditions List”, Select Strategic Goals Champions, Complete action/task plan of first 3 Strategic Goals (in order of priority); then ‘rinse and repeat’.



The team answered the SOAR questions during the Phase 2 planning process that led to list several possible strategic goals. By vote, the team narrowed the list to three (3) strategic goals that pointed back to DSA’s Strategy Aspiration. Each goal once implemented, in order of priority, will ‘*make the organizations Aspiration true*’. You can work on several strategic goals at the same time **if you have the resources** (money, people,

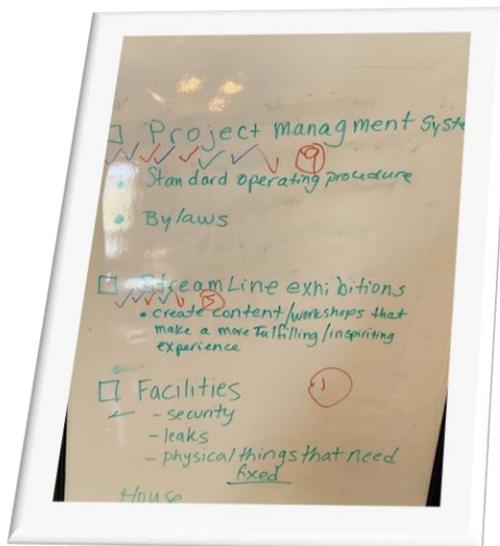
Champions, etc.) to complete the goal, in the projected time allotted. The Jael Group recommends only working on (up to) three strategic goals at one time if the resources are available.

“*Good strategic planning will help keep you from spending major time on minor things!*”
-Jalyn Q. Roe



THE STRATEGIC GOALS THE PLANNING TEAM CONSIDERED:

Ideas Presented:	Number of votes received to select the goals in order of priority :
Project management system <i>-Standard operating procedures (SOP)/ Bylaws</i>	9 votes
Streamline exhibitions <i>-create content/workshops that make a more fulfilling/inspiring experience/free up ED's time to work in/on strategic areas</i>	5 votes
Facilities <i>-security, leaks, physical things that need fixed</i>	1 vote
Membership Program <i>-recruiting, benefits, surveys, art lovers</i>	8 votes
Volunteer Engagement Program	1 vote
Pop-Up Studios/Tours <i>-of artist studios (field trips)</i>	4 votes
Members field trips (value added activities)	0
Happy Hours <i>-restaurants/off-site artist installations</i>	0
Website: Feature artist studios	0
Art rental program	0
Fun Stuff!	
*TJG recommends a “revenue generating funding program” & a “DSA branding campaign” be added to the list of Strategic Goal possibilities.	





EXECUTION / IMPLEMENTATION | Phase 3:

The priority goal the planning team voted to implement first was to onboard a project management system.

In Phase 3, the team will need to select “Champions” for the strategic goals they want to begin with. During Phase 3 the DSA “Goal Action Teams” will craft action/task steps to bring the vision and strategic goals created into reality.

What needs to be put in place during the Execution/Implementation Phase are the “action items (tasks list) for the top three (s) Strategic Goals selected.

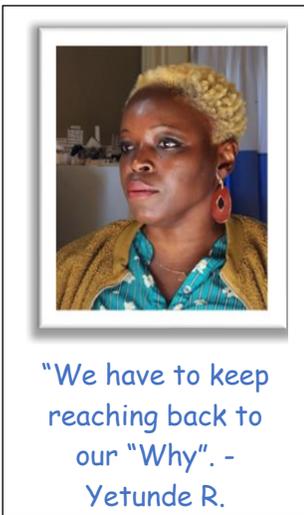
- ✓ **Volunteering to “Champion” the Goal:** its best if someone who is passionate about seeing the goal get completed and implemented in the organization, volunteer to be its Champion. The Champion does not have to do all the work, however they are held accountable for the work getting done in a timely manner. They can form a “Goal Action Team” (3 to 4 people to work on the strategic goal). If no one volunteers to be the Champion (not a good sign), the Champion will need to be appointed by the E.D. or planning team.
- ✓ **Action Items Development:** To develop the action/task items, go back through the SOAR process to establish what strengths, opportunities, [you have the Aspiration], and results for the strategic goal your working on. And then list ‘next steps’ to take.

- ✓ **Weekly Reporting:** Weekly team reporting is important to make sure everyone is on the same page and the Strategic Goal is actually being worked on. Select/use a project management tool to help in measuring progress, accountability and course correction.
- ✓ **Board, Action Teams and Staff Meetings:** Agenda's for these meetings should lead with reminding the teams of DSA's "Strategic Aspiration" – it sets the stage for positivity and starts the meeting on a high note. The goals progress should be reported by the Champion. Make these strategic goal reports a high priority on the agenda in order to keep them top of mind.
- ✓ **Measuring, Monitoring, Accountability, and Course Correction:** TJG uses the "RACI" project management tool to keep teams working on the strategic goal moving forward. Whichever PM tool you select, use it because "that which gets measured gets done"!

Top Three Strategic Goals Selected By The Planning Team:

- 1) **Management System(s)**
- 2) Membership | Recruiting, Development
- 3) Streamline Exhibitions

During the Phase 2 SOAR planning process, the team walked through the process for creating the action steps for the Strategic Goal "Management System Implementation".



Yetunde Rodriguez volunteered to be the Champion for this Strategic Goal. The goal 'Action Team' consists of the Champion plus: **Jo Bell, Julie Riley, and Laurie Westheimer.**

GOAL: CREATING A PROJECT MANAGEMENT SYSTEM FOR DSA:

Strengths [currently have/need to acquire]:

- ✓ Budget – determine costs [501c3 discount for a management system?]
- ✓ Research – secure and view demos
- ✓ System requirements: user friendly, communication & marketing tools, customer management, calendar, organized document storage,
- ✓ Training – in person, together [hands on], big screen
- ✓ Accountability tool [RACI-responsible, accountable, consult, inform]
- ✓ Timeline – dates for assignments/task to be completed
- ✓ People – Action team (consensus), trainers, who else?

Opportunities:

- ✓ Standard Operating Procedures (SOP)
 - Risk management/prevention [“Preparation Management”]
 - “Future Proofing”
 - COVID Plan → Security
 - Building Maintenance contact list
 - Financial procedures [bookkeeping, taxes, GuideStar]
 - Donor/member management [for “thank yous” not developing]

Opportunities -continued:

- ✓ Bylaws
- ✓ Board Members Handbook
- ✓ New Board Member “Welcome Pack”

Aspiration:

- ✓ Evaluation – Check in: to confirm the organization’s Strategic Aspiration is being served by this Strategic Goal or have we drifted away from the purpose in our actions/task?

Results:

- ✓ We will have completed SOP’s documented in all functional areas of the organization
- ✓ We will have a re-write on the Bylaws to be/stay in nonprofit compliance
- ✓ We will have a system to track ‘follow-thru’ and ‘timelines’ on important task and action items
- ✓ **WE WILL celebrate our successes!!** [this is important (Laurie & Yetunde -smile) write out what the celebration will look like once the Strategic Goal is completed]





Benefits of 'Investing Time' In Strategy + SOAR Planning:

Fulfill grant requirements. Stop confusion. Path forward. Board agenda. Member focused. SOAR Planning is derived from the Appreciative Inquiry model, it is a process for transitioning an organization, **including its people**, from their current state to an “even better” state of operation. The Strategy + SOAR planning process that your team just completed can reap great benefits in terms of both *economics* and *culture* for your organization.

If DSA commits to what you've learned about strategy, planning and execution in your two day session, you team will be able to drive better performance and you will accelerate your strategic goal results through using the same effective techniques that the planning team performed throughout the session. This strategic plan that the DSA team has developed will stimulate conversations around action and will impact your workplace in increasingly positive ways, but only if you use it.

Evergreen Deliverables:

Rinse and repeat. -The Jael Group's Strategy + Planning process strategically discovers the 'best of' what an organization has or needs to get to create a shared vision of the future. The DSA planning team has created a compelling “Strategic Aspiration” that will lead and guide your decision making.

By going through your strategic planning process, the planning team became the designers of their own future. That's why the SOAR planning process is so empowering and the gains tend to be exponential instead of incremental.

WISE COUNSEL:



Strategy + Planning Implementation with “Business Coaching”

Jalyn Q. Roe & Steven Roe, Sr.
Strategy Advisers | Executive Coaching

The Jael Group has offered the DSA Planning Team up to eight (8) hours of free coaching to help kick off the implementation phase of their strategic plan.

The focus of having a “Business Coach” is to move you forward into the Implementation Phase after the strategic planning session has culminated. Your Coach provides an accountability process, observes your patterns for productivity and makes recommendations for improvement. Your coach also helps you build action tasks and timelines around your priority, and will help you in the course correction process, as needed. Coaching brings out the “genius” and strengths within the Champions and Action Team members that can often be overlooked or not utilized.

The timeframe for a coaching relationship can be:

- 1) a set number of hours,
- 2) per project completion or
- 3) ongoing by retainer.

The coaching relationship between the Executive Director (or team), is a “partnership” where agreed upon outcomes and results are established at the beginning of the process.

We feel that the DSA planning team did great work during their two-day strategy + planning session! And each member leaned into our ‘appreciative’ process. You are positive leaders in your field and it showed.

Please contact us if you’re interested in taking us up on our strategic plan ‘implementation coaching’ offer [thejaelgroup@gmail.com] - *It would be our pleasure to continue to work with you on this journey!*



**DSA
PLANNING TEAM
"PHOTO GALLERY"**



**The Jael Group is honored to be able to add
Dayton Society of Artists to our
'Outstanding Client' List!**



We thank you for choosing us!
TJG - 40 Plus Years of Client Service-
***"We work with people, companies and organizations that are
choosing to make a positive difference in the world"! Godspeed to you!***
-Steven & Jalyn Roe
Strategy Advisers

FOR IMMEDIATE RELEASE
Jpeg Photo Attached

Contact: E.D. Jo Bell,
937.228.4532

Dayton Nonprofit Established in 1938 Makes Plans for the 21st Century and Beyond!

Dayton, OH – Nine (9) stakeholders of the Dayton Society of Artists (DSA) nonprofit, worked with strategic advisers, Steven and Jalyn Roe of The Jael Group during a two-day planning session to chart the course for the future of the organization.

The DSA planning team looked at strategic possibilities for the future that will bring greater value to artists and art lovers. DSA released its “Strategic Aspiration” to the DSA membership and community last week announcing: “DSA is inspiring and nurturing community, and fostering the artistic spirit of artists and art lovers in the Miami Valley”; it was well received.

The Jael Group created a customized strategy + SOAR planning program for DSA. The process included a modular design based on the Appreciative Inquiry methodology that stepped the planning team through four strategy development phases. The SOAR (Strengths, Opportunities, Aspiration, Result) planning process was used to create the strategy implementation phase for DSA’s future artist-valued programs & events.

Board member **Marsha Pippenger** stated after the hands-on sessions, *“I feel we as an organization now have a good sense of next steps and a path forward!”*

If you would like more information on the Dayton Society of Artists’ future plans and/or membership offerings, please visit: www.daytonsa.org or email Executive Director, **Jo Bell** at director@daytondsa.org

-END-



Back row L-R: Maria McGinnis, Jo Bell, Matt Cary, Julie Riley, Marsha Pippenger, Laurie Westheimer, Steven Roe, The Jael Group | 2nd Row L-R: Elizabeth Wetterstroem, Yetunde Rodriguez. Front seated: Jalyn Roe, The Jael Group | Not pictured: Mikee Huber