



Sautee Nacoochee
Community Association

Field Application Exercise
2 of 5

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Past and Present Strategic Planning within the Sautee-Nacoochee Community Association

“When pursued correctly, the planning process fosters creativity,
Rather than creating fossils”

-Ed Taylor, NEA Planning Specialist

Strategic planning within the Sautee-Nacoochee Community Association (hereafter referred to as SNCA) is not a new concept. Since its earliest days a formalized plan has been seen as a necessity. In many cases this plan serves to illustrate both where ideas came from and how the center either completes the goal or how the center intends to complete it. Three versions of the strategic plan have been developed for the center. Each plan is different in approach and goals.

The earliest plan (entitled “Goals for Developing an Arts and Community Center at Old Nacoochee School, Second Draft”) was developed in 1986 and is four pages long. The plan consists of a series of broad goals followed by more specific objectives which serve to complete the goals. A financial statement is included as well as a sheet defining cost estimates of specific goals. Goals-based planning is probably the most common form of strategic plan and starts by focusing on the organization's mission (and vision and/or values). This type of plan will also include goals that work toward the mission, strategies to achieve the goals, and action planning (who will do what and by when). This 1986 plan does not include a defined statement of mission, nor does it include any steps for action planning. Whether this is because of the size of the early organization, the structural effectiveness of the early organization or for some other reason is unknown.

This early plan defines three goals for the organization. These goals are:

COMMUNITY: RECLAIM AND BUILD A SENSE OF COMMUNITY.

ARTS: IMPROVE THE QUALITY OF LIFE IN WHITE COUNTY THROUGH THE AVAILABILITY OF QUALITY, PROFESSIONAL ARTISTIC PROGRAMMING AND EDUCATION.

PRESERVATION: SERVE AS A CATALYST FOR PRESERVING THE SAUTEE-NACOOCHEE VALLEYS.”

Once the SNCA defined the three goals, the plan addresses the various ways the goal could be completed. In an effort to address the Community goal, the SNCA decided to:

“Provide a common meeting place for community activities and groups.
Actively seek the involvement of the entire community of residents.
Provide opportunities for unstructured recreational and athletic needs in the community.
Function as an educational resource center for the exchange of information about issues and events of local concern.
Promote and active citizenry through local involvement in a project to reclaim a part of the valley’s past, to “empower” ourselves with the knowledge that we can influence and direct our own community (and hence, larger) affairs.”

The SNCA determined that in order to meet the Arts goal, they would:

“Support local artists and craftsmen/women by providing an outlet for showcasing their work through performances, teaching, and exhibits.
Develop the center into a regional cultural center for the performing arts which would attract reputable artists from other areas to visit, work and perform.
Provide educational classes and activities in all forms of arts and crafts.
Foster a reputation for artistic excellence and excitement which alone can generate interest in the community and long-term genuine visitor appeal.”

In order to meet the Preservation goal, the SNCA decided to:

“Serve as a center for the study of issues related to rural, historic preservation, with the Sautee and Nacoochee valleys as a model.
Provide an authentic destination for tourists where emphasis lies with mountain arts and culture.
Influence a shift in the County’s economic policy on tourism by providing a tourist attraction based on indigenous mountain life while maintaining the historical integrity of the area.
Showcase the valley’s Indian heritage and rich history.
Preserve mountain culture.”

Long range planning goals included hiring an Executive Director for the Community Association Center, developing professional landscape and architectural plans, paying off and securing the property, and specific repairs on existing structures.

“Strategic Plan For FY: 1997-2000” is the second strategic plan developed by the SNCA. Like the previous 1986 plan, a Goals-based approach is used for the format; however, the board decided that in “...an effort to garner opinions and ideas from the membership and various communities that it serves...the Planning Committee would begin its planning process with...surveys and assessments”. (1997 Strategic Plan Intro.)

The SNCA planning survey was “designed by the planning committee...to measure the community’s agreement or disagreement with its mission and programs.” Distributed through the SNCA newsletter, placed at community functions, and given to members of committees, recipients were asked to respond to help the SNCA develop its plan for the upcoming years in a way that was viable to the community the Association attempts to serve.

Ninety-Eight responses were returned. “...of these, eighty-seven rated its accomplishment of its mission at excellent or good. Only seven gave it a fair or poor rating. Fifty-eight respondents said they believed strongly in the current mission. Thirty-four agreed moderately. Only one went on record as not agreeing at all”.

An audience survey was used to gain information from audience members attending SNCA events. The survey sought to measure program quality as well as to gain demographic data to be used in marketing efforts. The audiences (one hundred and eight responses) reported that the “quality of the event” was the most important aspect that should guide a programming decision. Seventy-six respondents listed that the quality of the current programming as “Excellent”.

The third way the SNCA Planning Committee attempted to measure mission fulfillment was through a Community Meeting. Notice of the meeting was published in the newsletter and approximately sixty people attended. Through focus groups, the attendants were asked to identify both what they liked about the SNCA and what they thought needed improvement within the organization. Following the focus group discussion, a summary of opinions was printed in the SNCA newsletter. The following are excerpts from the summary of opinions:

“A great deal of satisfaction and pride was expressed in the accomplishments of the organization. This included the development of the facility, and the creation of a center that brings the community together, including people of all ages, interests, and economic backgrounds, and provides them with cultural enrichment, educational opportunities, the possibility for change and openness. The gallery, museum, and the many successful arts productions were mentioned, as was the Association’s functioning as a place for beginning artists to gain support and develop. A number pointed out that there has been an extended period of effort in accomplishing all the above, resulting in organizational burnout. The present was seen as time for a break, and an acknowledgement of the need for a resting phase.”

“...there were some individuals who felt that more efforts needed to be made to include a broader range of participants...specific activities included more programs for children, more education programs, and more community activities.” A number of participants expressed a need for “...more balance in programming. Some participants did not want to see less arts programming while others did, but they agreed that there should be more environmental programs and community activities. One of the primary issues concerned arts programming. The perception of a number of participants was that there had been several offensive productions in recent years which had resulted in a loss of the community’s trust and support. That, combined with the focus on professional arts programming has given rise to the perception in some community members that the SNCA is elitist, too liberal, an inappropriate place for children. Some voiced their perceived need to draw more from the community for productions and to pay local artists as well as visiting artists. There were calls to return to more “traditional” programming, to more “family-oriented” programming, more like the old programming. At the same time there was a repeated resistance to any form of censorship. A potential resolution was heard in the voices calling for the full range of programming, but with propriety of scheduling and clarity of program description.”

“...Several (participants) expressed the need to ensure that programs draw the audiences and/or financial support to pay for themselves. The suggestions were made for lower event prices and member discounts. A common theme was how to improve fund-raising for programs...and of improving the system for involving volunteers and organizing their activities, including more support.”

Nine months after the Community Meeting, the Planning Committee held a series of group meetings comprised of all available Members of the Board to discuss potential changes within the proposed strategic plan. Many ideas were discussed and several common themes began to emerge from each meeting:

No members saw a need to change the mission of the organization, though it was questioned if the current wording of the mission led a reader to see as parts subsequent to the first were seen as secondary in importance.

The current level of imbalance within the organization exists due to insufficient staff and poor communication. Developing a proactive model of organization is needed to combat this imbalance.

Each individual program should find ways within their respective curriculums to enhance other offered programs.

There are sections of the community that routinely do not participate in offered programs. The African-American community remains non-participatory because of either a perceived lack of programming that focuses on their interests or a feeling of not belonging within the community that is served by the SNCA. Young people (of all races) need to be encouraged to participate in programs.

Outlines for educational components, housekeeping, facility maintenance, and safety need to be developed.

“Is the Board too large?” was a question discussed by several members. The conclusion was that the present number of seventeen is much more reasonable than the previous high of twenty-six. It was determined that the Members of the Board perform many tasks which would fall on paid staff- if the SNCA could afford more staff.

There is a need for the Programming Committee to coordinate offerings with similar offerings from other groups in the community. A reevaluation of programming is necessary to identify and fill "niches of need" which are not being met by others. Conversely, where others are filling needs, the SNCA might "slack off". A consistent method of fundraising should be developed and utilized to create a better understanding of when and how to coordinate all fundraising efforts.

The format of the Strategic Plan for FY 1997-2000 begins with a well-defined mission statement. Following the mission statement is a series of "Primary Initiatives" that are followed by short-term (by June, 1998) and long-term (by January, 2001) program goals, financial goals, marketing goals, goals for organizational development, and facilities goals.

The following mission is stated in the first section of the 1997 Strategic Plan:

"The mission of SNCA is to provide opportunities for cooperative participation in preserving the historical, cultural, and environmental resources of this area and for developing and participating in comprehensive quality arts programming and endeavors. It is our intention thereby to develop a sense of community and to promote an active and involved citizenry."

Section two of the 1997 strategic plan lists the following four primary initiatives:

"...There has been an emphasis on arts programming in the mission statement and in the organization's history that has been reaffirmed through the present planning process...however, SNCA received the input that various individuals...wish for more activities in other program areas. It (SNCA) will attempt to satisfy their desires as well as possible in relation to the resources and funding of the organization. A major initiative of the SNCA will be to provide more opportunity for community participation and involvement through a creative and vital mix among four primary program areas...Arts Programming, Community Activities, Environmental Preservation, and Historic Preservation."

"By the year 2001, the SNCA will have achieved greater fiscal stability through the development of an effective fund-raising board and staff and will increase the amount of funds contributed to the organization during the annual campaign by 30% over the amount raised in FY 1997."

"By the year 2001, the SNCA will increase the involvement of the community as audience, program participants, members, and volunteers by 30% overall...based on 1997 figures."

"By the year 2001, the SNCA Board and Staff will undertake the organizational development necessary to maintain and build upon the accomplishment listed above."

Section three of the 1997 strategic plan contains both Overall Program Goals and a comprehensive listing of Specific Program Goals. Each Specific Programming Goal (Arts, Community, Environmental, Preservation, Financial, Marketing, Organizational, Facilities) is listed with estimated completion date and person/group expected to complete it following

each goal. This portion of the Strategic Plan is the Action Plan. Whereas the previous SNCA Strategic Plan had no method for Action Planning, this plan shows a greater appreciation for not only “What we want to get done” (Goals) but also “Who will get this done” (Action Plan).

A series of Overall Program Goals contain both short-term and long-term goals. Only the long-term goals contain an action plan.

Short-Term (by June, 1998):

“1. Develop a philosophy statement for each of the four primary program areas. Express the values and goals in each program area and set quality criteria for the activities of the SNCA. In doing so, refer to the response made in the audience survey conducted in 1996 concerning the approaches for governing program decisions. In addition, review issues raised about the program selection process and fiscal responsibility raised by participants in the community meeting and include policies to address them.

2. Develop an education component in all of the program areas and serve as a resource, as needed, to the school system and the community at large.”

Long-Term (by January, 2001):

“1. Assess the implications of competing programs (e.g. the High School’s new theater) that have come into being since SNCA’s inception *vis a vis* the Association’s mission and program balance. (Program Committee)

2. Develop process for determining the amount of programming that is realistic based upon budget, staff size, and resources. (Finance Committee)

3. Discuss and present to the Board recommendation concerning the relative focus to be placed on programming for adults vs. programming for children in relation to organizational purposes. (Program Committee)

4. Set goals for numbers of program participants based upon FY 1997 and prior.”

The SNCA is now in the planning stages of updating the Strategic Plan which was adopted in 2002. According to the Executive Director, 40% of the plan is already accomplished. This latest plan is an outline of general and specific goals. The plan begins with a general Strategic Direction. This direction is followed by a more specific goal created to support the direction. Objectives support the goal. Objectives are followed by specific action steps one must take to ensure completion of the objectives. Persons responsible for performing the action steps, the timeframe by which they must complete the steps, and the cost impact of step completion finish the horizontal axis of the outline.

While this plan is not in a “report format” as are the previous two strategic plans, there has been a real effort to nail down specifics as to how the goals are to be carried out. There are three Strategic Directions of the current SNCA. These are “Promoting Community

Involvement”, “Ensuring SNCA Long-Range Financial Security”, and “Building a Wholistic Organization”. Where the first plan only showed “What we want to get done” and the second plan showed “Who will get it done”, this latest plan goes further by adding the action steps that describe “How we will get it done *and* what it will cost”.

The promotion of community involvement has been a recurring theme in each of the strategic plans put forth by the SNCA. It is especially critical in any community organization to involve the community the organization claims to serve in its programming. Where the first plan seeks to “Reclaim and build a sense of community” and the second plan aims to “...increase the involvement of the community...by 30%”, unlike the previous plans, the present plan tells us how the SNCA intends to manage the promotion of community involvement. The SNCA will “Create...and implement... a comprehensive marketing plan to increase participation by existing audiences and build relationships with new audiences”. Included in this marketing plan will be strategies to gather program information, strategies to disseminate SNCA activity information, strategies to gain better audience understanding, and strategies to identify and cultivate alliances with similar organizations. The listed action steps which will be taken in order to identify and cultivate strategic alliances are to be completed by the Public Relations Coordinator, the Executive Director, and various staff members. These steps are ongoing or should have been completed in 2003.

- “1. Coordinate cultural tourism program with the Georgia Tourism and Trade office and Helen Welcome Center with the goal of being consistently included in regional tourism efforts.
 - 1A. Initiate reciprocal web links.
2. Establish relationships with other area groups that deal with the arts, history, and environmental issues with the goal of cooperating in educational and marketing efforts.
 - 2A. Conduct reciprocal tours with other area cultural attractions.
 - 2B. Create marketing links with other area cultural organizations such as cultural corridors, joint ticketing, shared advertising, etc...
3. Strengthen relationships with area colleges and forge partnerships for SNCA program areas.
 - 3A. Offer programs and price discounts that specifically target students.”

When asked about the greatest threats to the SNCA, the Executive Director answered:

“In my opinion, the greatest threat to the organization is also one of our greatest strengths - the enormous scope of our mission and range of our programs. Most nonprofits have a purpose that is pretty clear cut and well defined. The disadvantage of our multiple personas is the ongoing challenge of managing what are essentially separate businesses and keeping them integrated under one umbrella. It also is difficult to keep donors satisfied when their interests are all over the board. We are trying hard to establish SNCA as a single entity with many facets. However, at times it feels more like running a shopping mall with everything from yogurt shops to bookstores all under one roof. On the other hand, our diversity also provides us with multiple hooks to secure the interest of a community with diverse interests.

It is difficult to find a comparable nonprofit organization to use as a model. The neighborhood associations in New York (i.e. Henry Street Settlement) are similar in their provision of cultural and social services, but even they don't also add on history and environmental advocacy.”

The SNCA indeed has a large umbrella. It is evident that planning has been an important and valued process within the organization from its inception. In addition to the continuation of planning for programming and fund-raising, perhaps the best way to move the SNCA forward is by comparing and contrasting all three strategic plans and charting any issues that are constants and finding ways to deal with them.

What would happen if the center becomes, as one participant said, “an inappropriate place for children”? If parts of the community begin to drift away from available programming at the center because they see the center as “elitist”, what impacts will this have on financial support and attendance? A possible place for the SNCA to begin could be the creation of a curriculum review committee consisting of members who understand the present issues and can help to define “appropriate” programming while ensuring issues of censorship do not emerge.

The newest plan echoes the idea from previous plans that it is important to create an interdisciplinary curriculum so that each program offering helps support the other program offerings. The present plan calls this a “*wholistic organization*”. Wholistic is a play on words combining whole (the whole/entire organization) with holistic emphasizing the importance of the interdependence of the entire organization.

There are a number of issues the SNCA acknowledges a need to deal with. The attraction of new audiences has been an issue from the beginnings of the organization. According to the Executive Director, the SNCA historically has not had a problem with attracting an older population. This has been discussed within the last two strategic plans. The present solution to gaining younger participants is by having more young people on programming committees. (Younger is defined as the population under fifty years old). It is hoped that this will make it easier to define and offer programming which will attract a younger participant. Another possible solution would be to enhance the focus groups to include target populations for programming. If the goal is to attract thirtysomethings toward the art classes, inviting a group of the target demographic to a meeting could prove beneficial. In addition to getting the target group on the property to observe first hand all of the great programs that are offered, this approach would have the added benefit of finding out exactly what the group is interested in. This information would make programming for a particular group much easier.

A goals based strategy for planning has allowed the SNCA to flourish. The center is very far ahead of its beginnings in both what it attempts and in what is successful. The inclusion of well-defined action steps within the strategic plan will be helpful to those who are responsible for performing the task. As good as the action steps are, they won't mean anything if they are not completed. If the best strategic plan sits on a shelf, the end result is the same as if it were never written. I would suggest another step in the process: evaluation. This evaluation component should be defined and included in the strategic plan. What changes will be necessary if the action steps either don't work as intended or don't get accomplished?

What is an alternative to the large umbrella that exists within the SNCA? A worst-case scenario would be for the SNCA to split up into four or five different organizations, each focusing only on its primary mission. A better solution would be to ensure a constant stream of communication between departments. As one of the strategic directions is to become

more “wholistic”, perhaps those in charge of the departments should really investigate how integrated curriculums function. By planning activities that not only address the goals of a specific department, but also help to support the other departments, the entire organization might benefit.

The strategic plan should be a changeable, fluid mechanism which allows any eventuality to be placed within to make the most of an opportunity. If the SNCA can fulfill all of its stated objectives the organization will be at its strongest point. Through continued planning and maintenance, the SNCA will become an integral community association with optimal change and growth.