



2018-2021

# STRATEGIC PLAN

*Setting the Stage for Sustainability*

Muse  
machine



# ABOUT MUSE MACHINE

## VISION

Muse Machine is a place where imagination and inspiration meet teaching and learning. We envision schools transformed by the arts—every young person beginning a fulfilling lifelong journey as an arts maker, learner, audience and patron—every teacher engaging deeply with outstanding artists, arts professionals and artistic work—every family creating vivid memories of shared arts experiences. Because of the connections between Muse Machine schools and Dayton’s rich artistic resources, we imagine a vibrant future for our arts organizations, artists and community.

## MISSION

The mission of Muse Machine is to change the lives of young people through the arts.

## WHO WE ARE

Muse is a nationally recognized arts organization annually serving 76,800 students and 600 teachers in 13 counties in southwest and central Ohio and northern Kentucky. From preschool through high school, Muse uses the arts as a means of creative and personal growth and to illuminate classroom curriculum. Students are engaged through artist residencies and performances in the schools, professional productions, a winter musical and summer concert, and other partnership activities. Teachers are supported through year-round professional development, which strengthens their understanding of the arts so that they might embody these experiences as outstanding instructors.

## BOARD OF TRUSTEES

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David Taylor

Ira Thomsen

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### FOUNDER

Suzy Bassani

### EXECUTIVE DIRECTOR

Mary Campbell Zopf

## PROGRAMS AND SERVICES

Through Muse Machine's coordinated programming among Dayton's arts organizations, professional artists, and area schools and teachers, young people PreK through Grade 12 are encouraged to make the performing and visual arts a vital part of their lives and, in the process, develop their ongoing commitment to attending and supporting the arts.



**IN-SCHOOL  
PERFORMANCES**



**OUT-OF-SCHOOL  
PERFORMANCES**



**WORKSHOPS &  
ROAD TRIPS**



**MUSE MACHINE  
PRODUCTIONS**



**ELEMENTARY  
RESIDENCIES**



**TEACHER  
DEVELOPMENT**

## BACKGROUND AND CONTEXT

Every day, we see how Muse contributes to the hundreds of unfolding human stories because of the efforts of the Muse community. Some days we are addressing urgent needs; other times, we are laying a foundation for the future. Our best work is done when we listen closely to the dreams and aspirations of our community as we create a future that inspires us.

As we shaped the *2018-2021 Strategic Plan: Setting the Stage for Sustainability*, we drew on information gathered through informal conversations and more formal evaluation processes from 2015 to the present, including:

- more than 1,200 evaluation surveys of our programs and special projects
- third-party, in-depth phone interviews with 80 organizational and program stakeholders
- third-party research efforts to study program outcomes, marketing strategies, and customer satisfaction
- testimonials from parents, teachers and students involved in the winter musical about their experiences auditioning, rehearsing and performing
- video interviews of program participants
- 60 school visits to introduce Muse programming and talk with teachers and principals in existing Muse schools
- continuous sharing of data analysis, reflection, and interpretation involving staff, board, and stakeholders



We also convened roundtable discussions to gain greater perspective on safety and security issues, teacher leadership roles, new teacher needs, and the ways in which our board can be strategic leaders for Muse.

We thank all members of the Muse community for generously sharing of their time and ideas to this plan, and we could not be more proud of their work.

Mary Campbell Zopf  
Executive Director



## STRATEGIC GOALS

“

*I participated in the musicals through high-school and am proud to support a stellar organization. While my career has not taken me into the arts, the experience and skills gained from participating continue to enrich my life today.*

Michael Franko  
Denver, CO

”



### ONE

Ensure that young people of all abilities and walks of life can participate in Muse Machine programming.

### TWO

Position Muse Machine programs for educational impact, vibrancy and sustainability.

### THREE

Create a strong foundation for a long-term talent management plan (including succession planning).

### FOUR

Strengthen back-office capabilities (business forecasting, reporting, performance management, and dashboard and program analytics).

### FIVE

Drive the growth of Muse Machine's unrestricted individual giving (to include MuseMaker annual campaign) 10% per annum—and ensure the development and maintenance of a robust pipeline of giving for the future.

# A CLOSER LOOK

## STRATEGIC GOALS AND THEIR OBJECTIVES

### ONE

Ensure that young people of all abilities and walks of life can participate in Muse programming.

1. Ensure focused development efforts are in place to secure individual giving, business partnerships, grants and sponsorships for diverse artists, as well as schools and organizations that reach populations that are often under-represented in arts programming in the region.
2. Broaden Muse's program reach through vigorous outreach efforts to schools and organizations across Southwest and Central OH & Northern KY.
3. Strengthen commitment to programs that celebrate diversity and inclusion through relevant and accessible programming.

### TWO

Position Muse Machine programs for educational impact, vibrancy and sustainability.

1. Drive educational excellence through the use of research, content knowledge, creative teaching practices, exceptional programming and professional staffing.
2. Strengthen the Secondary Schools Program (high and middle schools) to ensure vibrant and successful Muse clubs and programs.
3. Establish a new Educator Excellence Endowment Fund for the Advanced Teacher Training Seminar (ATTS).
4. Create long-term professional development for new and existing program artists working in the Preschool & Elementary Program to support new growth in programming and schools participating in the program.
5. Expand workshop offerings for middle and high school students through partnerships with arts organizations, area colleges and universities and the Dayton Metro Library.

### THREE

Create a strong foundation for a long-term talent management plan.

1. Create, use and evaluate the new staff appraisal system based on HR best practices and Muse Machine's culture and needs.
2. Develop succession plans for executive director and all director-level positions (director of development, director of student programs, director of preschool and elementary program).
3. Outline knowledge transfer plans for director-level positions, including: job shadowing, video interviews, process documentation and, in some cases, filming program directors in action.

### FOUR

Strengthen core back-office capabilities (business forecasting, reporting, performance management, and dashboard and program analytics).

1. Continue data-cleansing efforts in development office and secondary schools program and standardize reports and reconciliation process with the finance office.
2. Develop a three-year plan to improve salaries for full-time and part-time employees.
3. Assess existing financial software against future data management needs and its interface with SalsaLabs in an effort to improve overall efficiency and effectiveness in tracking, monitoring and reporting.
4. Establish ad hoc committee to create a comprehensive Muse Machine operation manual.
5. Expand and update security policy and procedures to address active shooter preparations and additional child-safety procedures.

### FIVE

Drive the growth of Muse Machine's unrestricted individual giving 10% per annum—and ensure the development and maintenance of a robust pipeline of giving for the future.

1. Achieve key financial goals—i.e., 10% per year increase in unrestricted individual giving; maintain consistent grant revenues and grow sponsorships with a strong focus on securing increased support for winter musical.
2. Raise \$20K-\$25K new dollars annually for student performances (winter musical and summer concert) through sponsorships and/or major gifts for 2020 and 2021.
3. Increase individual reach and engagement through traditional and social media campaigns; strategic segmentation of appeals; and attention to and involvement of alumni and other key stakeholder groups.
4. Examine the quality and effectiveness of Muse's donor relations and stewardship activities/policies that foster long-term engagement/investment—such as planned giving, donor recognition, donor profiles, recognition and engagement events/opportunities, etc.
5. Assess and enhance digital and other marketing strategies, tactics, tools and practices.

## ACKNOWLEDGEMENTS



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Photography by: Ben Morrison, Danielle Naples & Daniel Rader

**Muse Machine**  
**Strategic Plan 2018-2021**  
*Setting the Stage for Sustainability*  
**Priority-Setting Handout**

July 1, 2018 – June 30, 2021

**Strategic GOAL ONE**

Ensure that young people of all abilities and walks of life can participate in Muse Machine programming.

**Objective #1**

Focus development efforts on ensuring expanded individual giving, business partnerships, grants and sponsorships for schools organizations that serve diverse populations and are often under-represented in local arts programming in the region. (2018-2021)

**Tactic #1 - Maintain (and increase) current level of funding from individual giving, grants and sponsorships, especially those that fund Title One schools. (Best Practice Standards: Grants and sponsorships are considered ‘soft’ money, thus, an organization should not exceed 25% to 35% of their budget from these sources. Muse is at approximately 34%. Individual giving in similarly sized arts organizations is 24% of the overall budget; Muse’s individual giving is at 12% of its budget.)**

Action	Responsible Party(ies)	Metric(s)	Timing
<ul style="list-style-type: none"><li>Maintain strong focus on the Circle of Friends Initiative to ensure success and to better understand the viability of this methodology to Muse’s long-term fundraising efforts.</li></ul>	Director of development and secondary schools program manager	Four Dayton middle schools successfully meet annual metrics, as detailed in their partnership agreements.	2018-2021 (underway)

<ul style="list-style-type: none"> <li>Identify and meet with individuals living and businesses located in neighborhoods where Title One schools (i.e., 40 to 100% students are eligible for free and reduced lunches) that might be interested in supporting Muse programming in a neighborhood school.</li> </ul>	ED, director of development, program directors/program manager and local Title One schools.	Meet with five to 12 regular and prospective funders annually in support of Muse programs: preschool & elementary, and secondary schools programs.	2018-2021 (underway) This is on hold. We are currently talking with Xenia and Springfield funders for the 2019-20 program year. In FY22, we will lose Tecumseh if we cannot secure some funding for them.
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**Tactic #2 – Research funding opportunities (grants or sponsorships) that support a diverse range of artists and vigorous outreach efforts to under-represented populations.**

Action	Responsible Party	Metric	Timing
<ul style="list-style-type: none"> <li>Talk with the Dayton Foundation about targeted program funding that features diverse artists, serves diverse school populations and promotes world cultures.</li> </ul>	ED and director of development	Research with the Dayton Foundation is complete.	2018-2019 We met with DF staff and there is no funding option for us. The Allegro Fund would work but timing was off for this program year.
<ul style="list-style-type: none"> <li>Update Muse's School Recruitment Plan to better reflect priorities in Muse's Diversity and Inclusion Policy by setting annual targets for diverse schools and students.</li> </ul>	ED and directors/program managers of student programming, preschool & elementary, and secondary school programs	Increase the number of schools that serve students from diverse world cultures.	2018-2021 (underway with strong results) A number of schools that were poised to join Muse in FY20 and FY21 are still interested in FY22.



<ul style="list-style-type: none"> <li>Ensure Muse's 2018-2021 Strategic Plan has strong metrics that align with Muse's Diversity and Inclusion Policy, such as metrics for the BoT, staffing, contractors, schools, students, etc.</li> </ul>	<p>Board of trustees, ED and all staff</p>	<p>Set annual targets for the new plan.</p>	<p>2018 2019-20 We secured four grants for "Feet Speak" and are bringing two diverse artists for the Muse opener and workshops for teachers and students. 2020-21 — We sought funding for our opener, "Tangled Up in You" but once the pandemic hit, funders were not supporting in-person performances.  On hold because of school access. Cannot seek grants for this type of performance until FY23.</p>
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## Organizational Capacity Plan

- What changes will the organization need to accomplish—including changes or additions to staff, additional fundraising, or other items—to fulfill its priorities?
  - We need an active BOT to help us increase individual giving and identify new business support.
  - Now that we have a strong development committee in place, we need to fully engage all its members in order to strengthen our fundraising efforts related to Goal One.
- What additional support will the organization need to achieve its goals? Should it engage consultants, outside volunteer experts/advisors, or take other steps?
  - We need to engage appropriate volunteers in researching a broader range of funding opportunities.
  - We need to engage more volunteers in our annual school recruitment efforts. A few years ago, we made 103 visits to schools and increased our school numbers by almost 25%. But, now our numbers are slipping and it is due in part by not making regular visits.

July 1, 2018 – June 30, 2021

## **Strategic GOAL ONE**

Ensure that young people of all abilities and walks of life can participate in Muse Machine programming.

### **Objective #2**

Broaden Muse's program reach through vigorous outreach efforts to potential schools and organizations across Southwest and Central Ohio and Northern Kentucky. (2018-2021)

**Tactic #1 – Increase participation in Muse's Secondary and Preschool & Elementary Schools Program by 12% over the life of Muse's 2018-2021 Strategic Plan (with a focus on communities that are in a one-hour driving radius around Dayton).**

Action	Responsible Party(ies)	Metric(s)	Timing
<ul style="list-style-type: none"><li>Focus Muse's Secondary (middle &amp; high) Schools recruitment efforts by setting meaningful annual targets for bringing Muse programming to all types of schools (urban, rural and suburban) across Muse's 12-county service area.</li><li>Use Muse's strategic protocol for school recruitment:<ul style="list-style-type: none"><li>Expand Muse's presence in school districts that currently have Muse programs.</li><li>Expand Muse's presence in rural/local school districts that are in neighboring counties/districts to current Muse schools/districts.</li><li>Contact schools serving a high percentage of students with special needs to discuss educational goals and possible funding opportunities.</li></ul></li></ul>	ED, secondary schools program manager, scheduler, school recruitment consultant and secondary school teacher leadership committee	By 2021, Muse will be working with 70 secondary (middle and high) schools. <b>Annual targets:</b> <b>2018-19—62</b> (currently at 58) <b>2019-20—68</b> <b>2020-21—70</b>	<b>2018-2021 (underway)</b>  Once the new Program Manager is on board, we will review our plan.  We had a number of interested schools (including former Muse schools) attend the SI and we are working with them to see if we could get them onboard for 2019-20.  New schools coming on in 2019-20: <ul style="list-style-type: none"><li>Troy HS</li><li>Middletown HS</li><li>DECA HS (returning after three years)</li><li>We need to follow-up with Lebanon Schools.</li></ul>

- Continue to build relationships with home-school associations.
- Re-engage former schools/districts in Muse programming.

#### Lebanon Schools by October.

##### Looking ahead:

- St. Peters is trying to have Secondary School Program.
- Springboro MS is still being worked on.
- In 2019-20, we have brought in three new schools from Hamilton for 2020-21.
- Active recruitment is underway for FY22.
- Recruitment is now underway with schools w/ a focus on those that were not able to join us in FY22.

<ul style="list-style-type: none"> <li>Improve the timeliness of mailing the Secondary School Program brochure.</li> </ul>	<p>Secondary schools program manager, scheduler and communications director</p>	<p>Mailing at the post office by:</p> <p><b>March 4, 2019</b></p> <p><b>March 2, 2020</b></p> <p><b>March 1, 2021</b></p>	<p>2019-2021</p> <p>In 2019, it went out the last week of March. Website updated by March CAM.</p> <p>For the first time in my tenure, we had the mailing ready to go at the beginning of March 2020 (thanks to Emily and Robin). But then it was not sent out because schools were closed. Since principals are in their buildings, we are sending nice notes to them with the brochures.</p> <p>Programs are identified but may not begin until November 2021.</p>
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<ul style="list-style-type: none"> <li>Host an informational/showcase breakfast for secondary school administrators in prospective schools.</li> </ul>	<p>Secondary schools program manager, scheduler and retired teachers/volunteers</p>	<p><b>Mid-February</b></p>	<p><b>2020-2021</b>  Teacher Advisor Leadership Group advised reaching them in late June. Still considering correct approach. These conversations have continued into 2021.</p> <p>They have been actively involved in FY21 and will continue to meet in FY22.</p>
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<ul style="list-style-type: none"> <li>Support growth of the Muse Preschool &amp; Elementary Program in after- and summer-school programs.</li> </ul>	ED, program director of the preschool & elementary program, program artists and director of development	<p><b>Annual targets:</b></p> <p><b>2018-19</b>—after-school program visits, <b>33 71</b></p> <p><b>2018-19</b>—summer-school program visits, <b>35 48</b></p> <p><b>2019-20</b>—after-school program visits, <b>60</b></p> <p><b>2019-20</b>—summer-school program visits, <b>40</b></p> <p><b>2020-21</b>—after-school program visits, <b>65</b></p> <p><b>2020-21</b>—summer-school program visits, <b>45</b></p>	<p>2018-2021 (underway)</p> <p>New schools—Well, we have secured Belmont Technical School for the Arts; Greenview is interested; other schools that are interested include:</p> <ul style="list-style-type: none"> <li>Stebbins HS</li> <li>Springboro Intermediate</li> <li>Troy HS</li> <li>We followed up with Lebanon Schools but we did not secure them.</li> <li>Centerville is still in communication with us.</li> </ul> <p>On hold until we know more about district re-opening plans. We have already reached out as of February 2021. Participation is desired by teachers and many administrators but it's a wait-and-see situation to see Health Dept. and Ohio Department of Education guidance.</p> <p>Recruitment is underway.</p>
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Support the next generation of residency artists in Muse's Preschool & Elementary Program through a four-year scale up program, including:	ED, program director of the preschool &	<b>Annual targets:</b> <b>2018-19</b> —a draft working plan	<b>2018-2021</b> In June of 2019, held our first Artist Workshop, which was a huge success.  Several diverse artists are now part of our secondary and PreK and elementary programs.
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<ul style="list-style-type: none"> <li>○ Hosting a round-table discussion with highly qualified teaching artists re: the attributes of exemplary teaching-artist training to inform Muse's training program;</li> <li>○ Identification of training opportunities for new teaching artists and more experienced artists in Ohio and neighboring states;</li> <li>○ Creation of a Muse training program for existing and new artists; and</li> <li>○ Implementation of fund-raising plan for the training program.</li> </ul>	<p>elementary program, program artists, director of development and outside experts</p>	<p>is in place.</p> <p><b>2019-20</b>—outside funding is secured to implement the plan or a portion of the plan.</p> <p><b>2020-21</b>—full implementation of the plan is underway.</p>	<p>On hold for the time being.</p>
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July 1, 2020 – June 30, 2021

### **Strategic GOAL ONE**

**Ensure that young people of all abilities and walks of life can participate in Muse Machine programming.**

#### **Objective #3**

**Strengthen our commitment to programs that celebrate diversity and inclusion through relevant and accessible programming. (2018-2021)**

**Tactic #1 – Select exemplary teaching artists from diverse backgrounds, art forms and artistic perspectives for Muse programming and teaching.**

Action	Responsible Party(ies)	Metric(s)	Timing
<ul style="list-style-type: none"><li>Develop three-year program plans for summer institute, advanced teacher training seminar, in-school performances that feature artists from diverse backgrounds and cultures.</li></ul>	ED, secondary schools program manager, director of student programs	Basic plan is in place for 2018, 2019, 2020 but not 2021	Completed plan in place by June 30, 2019 <b>Working title for 2020—Celebrating American Voices (jazz, cabaret, creative writing, DCDC, Eric Aviles, Student Performers from Stivers and Miracle Makers, etc.</b>
<ul style="list-style-type: none"><li>Attend Arts Midwest! annual conference every other year to identify new talent and teaching artists for Muse programs (summer institute, the opener for the in-school performance season, workshops, etc.).</li></ul>	ED, secondary schools program manager, director of student programs	Two staff attend the 2019 Arts Midwest Conference in Minneapolis, Minnesota	Wednesday, September 4-Saturday, September 7, 2019 <b>This needs to be put on hold until 2022.</b>
<ul style="list-style-type: none"><li>Create opportunities for visiting artists (SI and in-school performances) to lead.</li></ul>	ED, secondary schools program manager,	3-5 visiting artists lead workshops for students	2018-2019 (underway) <b>2019-20—Feet Speak! &amp; returning SI artists.</b>



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<sup>1</sup> Arts Midwest promotes creativity, nurtures cultural leadership, and engages in meaningful arts experiences, bringing the vitality to Midwest communities and enriching people's lives. Arts Midwest is a non-profit regional arts organization headquartered in Minneapolis that serves arts organizations and artists throughout nine states of Illinois, Indiana, Iowa, Michigan, Minnesota, North Dakota, Ohio, South Dakota, Wisconsin and beyond (international activities).

<p>creative workshops for Muse students while they are in Dayton.</p> <ul style="list-style-type: none"> <li>Offer at least three to five student workshops annually for Muse students and other teens through partnerships with community organizations, including the Dayton Metro Library.</li> </ul>	<p>director of student programs</p> <p>ED, secondary schools program manager, director of student programs</p>	<p>annually</p> <p>3-5 visiting artists lead workshops for students annually</p>	<p>2018-2021 (underway)</p> <p>In 2018-19 we hosted three student workshops.</p> <p>In 2019-20 we have one workshop planned and two special projects/residencies.</p> <p>In 2020-21 we had two student workshops and one teacher workshop planned, which were cancelled.</p> <p>BUT, we have had one student virtual workshop in 2021 and a second one is in the works.</p>
<ul style="list-style-type: none"> <li>Incorporate STEM (Science, Technology, Engineering, and Mathematics) content into programs (summer institute, club advisor meetings, library partnerships, in-school performances) on a regular basis.</li> </ul>	<p>ED, secondary schools program manager</p>	<p>3-5 programs/events per year</p>	<p>2018-2021 (underway)</p> <p>In 2018, STEM addressed at SI.</p> <p>In 2019, STEM addressed at SI.</p> <p>In 2020-21 STEM addressed Now You See It in-school performance. CANCELLED and on track for FY22.</p>
<ul style="list-style-type: none"> <li>Continue to incorporate multi-media productions annual secondary schools in-school performance series.</li> </ul>	<p>ED, secondary schools program manager</p>	<p>One per year</p>	<p>2018-2021 (underway)</p> <p>2019-2020-Ozmosis</p> <p>2020-21-Now You See It Rescheduled for FY22.</p>

**Tactic #2 – Broaden reach to new schools serving under-represented students including those with multiple disabilities,**

## English Language Learners (ELL) and home-school students.

Action	Responsible Party(ies)	Metric(s)	Timing
<ul style="list-style-type: none"> <li>Using Muse's successful outreach model for Title One schools, develop a three-year working plan for schools/organizations serving under-represented students.</li> </ul>	ED, development director, development committee	Basic plan is completed.	<p>2019-2020 (some actions underway)  2019-2020—Preschool &amp; Elementary residencies at United Rehabilitation Services (URS).</p> <p>2020-21-Preschool &amp; Elementary virtual workshops at URS with their preschool students.</p> <p>2020-21 Preschool &amp; Elementary virtual workshops at three Dayton Public Schools with their preschool students. Funded through NEA CARES Act funding and the Tait Foundation.</p> <p>2021-22-Preschool &amp; Elementary virtual or in-person workshops at URS with their preschool students. Funded through NEA CARES Act funding.</p>

<ul style="list-style-type: none"> <li>Secure funding for identified schools, serving under-represented students who cannot afford all or part of Muse programming costs. <ul style="list-style-type: none"> <li>Making Art, Engaging Community residency focuses on linguistically and culturally diverse students and schools. 2019</li> <li><del>Photo-journalism residency with Pulitzer-winning Michelle Agins in two Dayton-area schools: Wogaman MS and Springboro MS. 2019</del></li> <li>Preschool &amp; Elementary School artist residencies for Dayton Rehabilitation Services. 2020 or 2021</li> </ul> </li> </ul>	ED, development director, development committee	2-3 new schools receive funding	<p>2019-2021 (underway—NEA funding secured for Making Art, Engaging Community; Photo-journalism residency is partially funded; Dayton Rehabilitation Services funding is pending.)</p> <p>Everything has been completed and we also hosted a photography workshop w/Andy Snow.</p>
<ul style="list-style-type: none"> <li>Cultivate relationships with home-school associations serving home-school families by: <ul style="list-style-type: none"> <li>Developing a communications strategy with associations and families of home-schooled students.</li> <li>Creating webpage that focuses on home-school associations, students and their parents.</li> <li>Inviting home-school parents to Muse events.</li> </ul> </li> </ul>	ED, board members and program staff	<ul style="list-style-type: none"> <li>A Muse parent, who is active in the home-school community, has joined the programs committee. 2018</li> <li>New webpage is created for these families. Mid-2019</li> <li>Muse board members devise plan to invite home-school parents to the winter musical and summer concert, and summer institute, especially portions for students.</li> </ul>	<p>2018-2021 (some actions underway)</p> <p>Dec update: 2019 Webpage on hold because we are down a staff person and need to address other priorities.</p> <p>May: Given our new context: we are discussing how to create a page with resources for home-school teaching and online teaching.</p> <p>On hold until Dec 2021.</p>

**Muse Machine**  
**Strategic Plan 2018-2021**  
*Setting the Stage for Sustainability*  
**Priority-Setting Handout**

July 1, 2018 – June 30, 2021

**Strategic GOAL TWO**

**Position Muse Machine programs for educational impact, vibrancy and sustainability.**

**Objective #1**

Drive educational excellence through the use of research, content knowledge, creative teaching practices, exceptional programming and professional staffing. (2018-2021)

**Tactic #1 – Continue to use and create professional resources that document the primary research that informs each program. (These resources will allow board of trustees and staff to fully understand the attributes of high-quality arts education programs and position all programs for educational impact and sustainability.)**

Action	Responsible Party(ies)	Metric(s)	Timing
<ul style="list-style-type: none"><li>Develop logic models and theories of change for all program areas (secondary, preschool and elementary, student programs and teacher professional development).</li></ul>	ED and occasionally evaluation consultant	Logic models and theories of change developed for secondary schools program, the preschool & elementary school program and teacher programs. Need to do the same for student programs.	2018-2020 (80% complete)
<ul style="list-style-type: none"><li>Create annotated research inventories for each program for use in advocacy, grant proposals and evaluation, etc.</li></ul>	ED, contract evaluator, and outside help from higher education	Research inventories in place for teacher programs and preschool and elementary school program.	2018-2021 (90% complete) Grant



	institutions	Need inventories for secondary school program and student programs.	applications with extensive references to research: Tait, assorted SI grants, and research-based communication strategies document.
<ul style="list-style-type: none"> <li>Continue to brief the board of trustees and staff on best practices in arts education and creative learning approaches in order to support informed decision-making.</li> </ul>	ED and program directors	Include relevant information in ED reports, grants, Mission Moments at board meetings, etc.	2018-2021 (Ongoing)
<ul style="list-style-type: none"> <li>Consult with professional evaluators to ensure evaluation practices are sound and executed with fidelity.</li> </ul>	ED and contract evaluators	<p>Summer institute full evaluation every other year with the help of an outside evaluator.</p> <p>(Some state and federal grants require third-party evaluator involvement.)</p>	2018-2021 (Ongoing)
<ul style="list-style-type: none"> <li>Partner with education organizations that could assist with baseline and more sophisticated (thus costly) evaluation efforts.</li> </ul>	ED, program directors and community partners	A group is secured for evaluation effort in one after-school program.	2019-2020

## **Tactic #2 – Infuse creative and experiential teaching practices into all Muse professional development activities.<sup>1</sup>**

Action	Responsible Party	Metric	Timing
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<sup>1</sup> Creative teaching focuses on both the methods a teacher uses to deliver learning and the overall effect those methods have on students and the outcomes produced. A teacher inspires learners' interests in learning material, and then leads student to find the problem by themselves creatively, or present specific problems and ask learners to apply all sorts of available resources to find the best solution creatively.

<ul style="list-style-type: none"> <li>Strengthen the modelling of creative and experiential teaching practices through all of Muse's professional development activities.</li> </ul>	ED, secondary school program manager, scheduler, curriculum specialist and outside experts	<ul style="list-style-type: none"> <li>Annually track the number of sessions on this topic across all professional development programs.</li> <li>Check lesson plans to see if they reflect creative and experiential teaching approaches.</li> <li>Document progress through filming in teachers' classrooms.</li> </ul>	2018-2021 Completed Muse overview for use with artists interested in working with Muse. Face-to-face meetings are on hold because of the pandemic.  It needs to be professionally laid out by designer (After Fall 2021).
<ul style="list-style-type: none"> <li>Seek board of trustee members from universities who have extensive backgrounds in creative and experiential learning to advise on ways in which to strengthen creative and experiential teaching in Muse schools.</li> </ul>	ED, Muse board of trustees, governance committee, emeritus board members	List of candidates is created for the governance committee.	2019 There were no significant changes in FY20. For FY22, we have a number of individuals in mind, including two Hispanic individuals who are community leaders in education and cultural education.
<ul style="list-style-type: none"> <li>Identify Muse teachers using creative and experiential teaching approaches in their classrooms to profile and to lead sessions at Club Advisor Meetings.</li> </ul>	ED, secondary schools program manager and Muse contractor/curriculum specialist	One session annual at Club Advisor Meetings	2019-2021 This is underway—we are interviewing teachers for our experiential

			learning document. And many teachers were interviewed for the SI 2019 evaluation report. In FY21, we have held several focus groups and one focused on lessons learned through virtual teaching. This discussion was led by our third-party evaluator and will be summarized in an overview document.
<ul style="list-style-type: none"> <li>Conceptualize and write a chapter on creative and experiential teaching approaches for the Club Advisor Manual.</li> </ul>	ED, Muse curriculum specialist and outside experts	<ul style="list-style-type: none"> <li>A chapter outline is created in mid-2020.</li> <li>Excerpts from draft chapter are field-tested with Muse teachers/advisors.</li> <li>Final written piece is added to Club Advisor Manual.</li> </ul>	<p>2020-2021</p> <p>Once overview is expanded, Muse staff will adapt portions for the manual in 2022.</p>

**Tactic #3 – Work with outstanding professionals in the delivery of Muse’s year-round teacher professional development series (Annually approximately 350 secondary and preschool and elementary teachers accumulate approximately 3,000 hours of professional development).**

Action	Responsible Party	Metric	Timing
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<ul style="list-style-type: none"> <li>Formalize Muse's National Artistic Advisor Committee through writing charge statement, setting periodic times to meet, promoting their role within Muse publications, and identifying future projects.</li> </ul>	<p>Muse founder, ED, board of trustee members, current members of the national committee</p>	<p>Metrics need to be determined but could be:</p> <ul style="list-style-type: none"> <li>Written charge statement</li> <li>Profiles of advisors</li> <li>A more formalized schedule of meetings</li> </ul>	<p>2019-2020</p> <p>Need to find a board member or friend of Muse who could help with this. On hold until FY22 or FY23.</p>
<ul style="list-style-type: none"> <li>Ensure the Muse Summer Institute for Educators (SI) and the Advanced Teacher Training Seminar (ATTS) feature world-class artists, teaching artists, lecturers and feature guests that illuminate the diversity of arts forms, perspectives, cultures and points of view.</li> </ul>	<p>ED, all program directors/program manager, director of development, funders</p>	<p>Three-year program plan is in place for art forms and artists with which Muse plans to work.</p> <ul style="list-style-type: none"> <li>Jazz and The Evolving American Identity</li> <li>Identity, Belonging and Sense of Place</li> <li>Empowering Student Voices through the Arts (all art forms)</li> <li>Shoulder to Shoulder into the Fray: The Resilient Women of Opera</li> </ul>	<p>2018-2021</p> <p>(Plan in place for 2018, 2019, 2020 and 2021.)</p>
<ul style="list-style-type: none"> <li>Feature SI and ATTS artists throughout the year at Club Advisor Meetings, curriculum sessions and creative workshops for students (whenever possible).</li> </ul>	<p>ED, all program directors/program manager, director of development, funders</p>	<p>Annual plan in place that highlights artists who will return to be part of these follow-up workshops and sessions.</p> <p>We have a Scope and Sequence developed for 2019-2020 but CAMs cancelled for the pandemic through June 2020. CAMS are underway for FY21 and we have a draft basic plan for FY22 because of SI and follow-ups outlined.</p>	<p>2018-2021</p> <p>(Plans were implemented for fiscal years 2018, 2019 and 2020, and 2021.)</p>

<ul style="list-style-type: none"> <li>Seek outstanding educators, cultural experts and historians to complement aforementioned programs and enhance Muse's pedagogy of learning through the arts, history and culture.</li> </ul>	ED, all program directors/program manager, director of development, funders	Research conducted one year in advance of SI and ATTS.	2018-2021 (Underway)
<ul style="list-style-type: none"> <li>Draft annual program plan for the newly created preschool and elementary summer workshop to enhance and expand offerings to this population.</li> </ul>	ED, preschool & elementary program director, director of development	Basic plan in place one year in advance of program year to inform grant writing for 2019-2020.	2018-2021 (Ongoing)

**Tactic #4 – Support the professional lives of Muse Machine staff throughout their Muse careers and for the overall vibrancy, growth and success of the organization.**

Action	Responsible Party	Metric	Timing
<ul style="list-style-type: none"> <li>Set annual professional goals for each employee during their performance appraisal process with a strong focus on their personal and professional goals, which are aligned with Muse's 2018-2021 strategic goals and objectives.</li> </ul>	ED and director of development/HR	Staff appraisals are conducted and filed in personnel files. 2019—New staff have 90-day plans. 2019—2021 We are little behind because of shifting priorities because of the pandemic.	At annual review or at least by August as the new program year begins in 2019, 2020 & 2021.
<ul style="list-style-type: none"> <li>Prepare annual budget plan for staff professional development that aligns with staff members' annual goals as well as Muse's strategic direction for 2018-2021.</li> </ul>	ED, director of development/HR, finance director	Annual budget is prepared in the spring for board approval in June before the new fiscal year begins. As of mid-February 2021, staff have begun preparing the FY22 budget with two scenario assumptions (worst-case and somewhat hopeful scenarios). We plan to build-in some incentives for buying programs and giveaways of Muse swag to celebrate the return of Muse to schools.	July 1 <sup>st</sup> On track

<ul style="list-style-type: none"> <li>Set annual learning agenda for staff meetings in collaboration with staff that reflect contemporary issues faced by nonprofit arts organizations.</li> </ul>	All staff	<p>Internally, we are talking about “building a bridge to success” in FY22.</p> <p>Learning agenda is set in July, but board and staff can contribute ideas throughout the year.</p>	<p>Mid-July</p> <p>Somewhat behind on this task because of the pandemic. Working through a list of topics: ethics, all forms of harassment, safety, annual budgeting Emergency Operations Plan.</p>
<ul style="list-style-type: none"> <li>Secure outside experts to present at staff meetings or contribute to the success of business and educational pursuits.</li> </ul>	ED and all program directors	Throughout the fiscal year	2018-2021 On hold

## Organizational Capacity Plan

- What changes will the organization need to accomplish—including changes or additions to staff, additional fundraising, or other items—to fulfill its priorities?
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July 1, 2018 – June 30, 2021

## **Strategic GOAL TWO**

**Position Muse Machine programs for educational impact, vibrancy and sustainability.**

### **Objective #2**

**Strengthen the Secondary Schools Program (high and middle schools) to ensure vibrant and successful Muse clubs and programs through: 1) offering teacher/advisor professional development on running successful Muse clubs; 2) building strong working relationships with teachers and administrators in Muse schools; and 3) using retired Muse teacher/advisors as volunteer mentors for new advisors.**

**Tactic #1 – Provide focused professional development for existing advisors and mentoring for new advisors to ensure their Muse clubs are successful and take advantage of a full range of Muse programming.**

Action	Responsible Party(ies)	Metric(s)	Timing
<ul style="list-style-type: none"><li>Strengthen Muse Learning Resources (hard and electronic copies) through regular review with teachers/advisors, consultants, contractors and staff to ensure relevancy, quality and readability.<ul style="list-style-type: none"><li>a. Continue to expand electronic Club Advisor Manual.</li><li>b. Redesign lesson plan format (found on website) so that it can be easily downloaded as a PDF from the Muse website.</li><li>c. Continue to expand teacher resources on fundraising and other relevant topics.</li><li>d. Use short (2-3 min) video on teacher excellence and Muse's professional development activities in orientation</li></ul></li></ul>	ED, secondary school manager, curriculum specialist, director of marketing and outside contractors	<ul style="list-style-type: none"><li>a. Create three-year plan with annual objectives for expanding the Club Advisor Manual, including more financial information, tip sheets, detail on handling an in-school box office, etc.</li><li>b. Meet with director of marketing and Ligature, design company, staff to identify the best process for designing lesson plan format and posting learning artifacts on Muse website.</li><li>c. Identify a contractor to</li></ul>	<ul style="list-style-type: none"><li>a. 2019</li><li>b. 2019</li><li>c. 2019</li><li>d. 2019</li><li>e. 2020</li><li>f. 2021</li></ul> <p>All are underway.</p>

<p>sessions with new teachers and schools.</p> <ul style="list-style-type: none"> <li>e. Formulate plans to redo the Art of Learning videos.</li> <li>f. Seek funding for the new Art of Learning videos.</li> </ul>		<p>review resource materials for school fundraising to see how those might be enhanced and make it a topic at an upcoming Club Advisor Meeting.</p>	
<ul style="list-style-type: none"> <li>• Host two to three new advisor/new school orientation meetings annually.</li> </ul>	<p>Secondary school manager and scheduler, fiscal director, as needed</p>	<p>Meetings are held and evaluation survey results demonstrate growth in understanding and usage of Muse materials.</p>	<p>2018-2021 (Ongoing) Completed for 2018, 2019, 2020.</p>
<ul style="list-style-type: none"> <li>• Create an annual scope and sequence for Club Advisor Meetings (CAM) to ensure high-quality professional development sessions (5-7) throughout the program year. Design considerations include: <ul style="list-style-type: none"> <li>a. Return visits from summer institute and ATTS artists that focus on primary content for each program.</li> <li>b. Visits by Muse's arts partners (arts organizations, visiting artists, faculty from local colleges and universities, etc.)</li> <li>c. Relevant club topics: fundraising, curriculum, ticket sales, running successful clubs, fiscal management, etc.</li> <li>d. Creative learning and teaching approaches and strategies.</li> <li>e. Muse Captains training and roles in Muse clubs.</li> </ul> </li> </ul>	<p>ED, secondary school manager, scheduler, curriculum specialist, director of student programs, arts partners, outside contractors/artists, and fiscal director, as needed</p>	<p>CAM Scope and Sequence reflects design considerations.</p>	<p>2018-2021 (Ongoing)</p> <p>New program manager has addressed aspects of this in her 90-day orientation plan. And it will be mostly addressed through this position.</p> <p>As of April, the program manager was promoted to director of the secondary schools program.</p> <p>Face-to-face meetings on hold because of the pandemic. Muse Captains have not been addressed.</p>



**Tactic #2 – Develop strong working relationships with Muse schools to ensure higher levels of retention and satisfaction with Muse programs.**

Action	Responsible Party	Metric	Timing
<ul style="list-style-type: none"> <li>Write thank-you letters to all principals in Muse schools (preschool and elementary &amp; secondary schools).</li> </ul>	ED and board of trustees	Letters sent/positive feedback from schools	February 2018, 2019 and 2020 Completed
<ul style="list-style-type: none"> <li>Prepare press releases for major teacher programs (summer institute and advanced teacher training seminar) that advisors can use in school/community publications and/or website.</li> </ul>	ED, secondary program manager, marketing director	Press releases distributed and 50% of advisors use in some way in their schools. (SI press release was shared at SI in 2018.)	June and July respectively at advanced teacher training seminar and summer institute as the new program year begins in 2019, 2020 & 2021.
<ul style="list-style-type: none"> <li>Emphasize the importance of Muse advisors presenting at a school board meeting or having board members attend an in-school performance via ATTS scholarship criteria.</li> </ul>	ED, secondary schools program manager	<ul style="list-style-type: none"> <li>ATTS criteria were refined in 2018.</li> <li>Need to record numbers of advisors who report making presentations to board or inviting administrators to in-school performances.</li> </ul>	July at the summer institute as the new program year begins in 2020 & 2021
<ul style="list-style-type: none"> <li>Create annual schedule for Mission Moments at Muse board meetings including a presentation by a Muse advisor and his/her principal.</li> </ul>	ED, secondary schools program manager, preschool and elementary program director	<p>One Mission Moment that features an advisor and his/her principal.</p> <p>2019:</p> <ul style="list-style-type: none"> <li>Introduce three new Muse staff members.</li> <li>Reveal musical honoree at rehearsal/celebration.</li> <li>Director of Preschool and</li> </ul>	August as the new program year begins in 2018, 2019, 2020 & 2021. Because of the pandemic we had more staff presentations and virtual/video presentations.

		<p>Elementary Program and collaborating teacher lead Muse board in an activity.</p> <ul style="list-style-type: none"> <li>If the timing is right, have students from Stivers and Miracle Makers in to share performance work funding through the NEA grant.</li> </ul>	
<ul style="list-style-type: none"> <li>Review existing schools and identify ones that need assistance and work with advisors to address areas of need.</li> </ul>	<p>Secondary schools program manager, scheduler and retired Muse teachers</p>	<p>20 schools visited annually</p> <ul style="list-style-type: none"> <li>2019 – Secondary Scheduler visited 35 schools (including schools we want to get back into Muse) before the summer institute to share PR materials.</li> <li>2019--In early fall Secondary Scheduler met personally with teachers/advisors in 39 Muse schools.</li> <li>During the Secondary Program Manager 90-orientation period, she will meet onsite with at least 10 Muse schools.</li> </ul>	<p>September as the new program year begins in 2019, 2020 &amp; 2021.</p> <p>We cut back on the Scheduler's hours (an average of five per week) at the beginning of FY21; however, we were able to increase her hours for outreach in the fall because of Mont. County CARES Act funding. Starting in April, we plan to increase the Scheduler's hours for more outreach and build interesting SI and new programming in FY22.</p>
<ul style="list-style-type: none"> <li>Visit at least 1/3 of Muse schools annually to increase retention and build solid working relationships.</li> </ul>	<p>Board of trustees, staff, contractors, etc.</p>	<p>15-20 schools visited.</p>	<p>2018-2021 (Ongoing)</p>
<ul style="list-style-type: none"> <li>Discuss and identify core strategies for building strong working relationships with schools with Muse's secondary schools leadership committee.</li> </ul>	<p>Secondary Schools Program leadership committee</p>	<p>Add to leadership committee action agenda and implement their strategies.</p>	<p>2019-2021 (Ongoing)</p> <ul style="list-style-type: none"> <li>The aforementioned school visits were part</li> </ul>

			<ul style="list-style-type: none"> <li>of our strategy.</li> <li>Marketing/secondary created posters for all out-of-school performances (39), <i>Feet Speak!</i> Tap Workshop for Students and Auditions for <i>In the Heights</i>.</li> <li>2019 Leadership Meetings have not been scheduled, yet.</li> <li>2020 put on hold because of changing circumstances, but one was held.</li> <li>2021, two have been held.</li> </ul>
<ul style="list-style-type: none"> <li>Muse's program committee identifies ways in which board members can assist in this relationship building process with schools.</li> </ul>	Program committee	Add to program committee's agenda and implement strategies proposed.	2018-2019 Need to achieve greater clarity on how this will be done. Program committee meetings did not occur in FY20 but got back on track in FY21.
<ul style="list-style-type: none"> <li>Annually 40% of board members attend an in-school performance or culminating performance and send a thank-you note to the principal.</li> </ul>	ED, programs committee (need system for tracking participation), development office	Track attendance data and ask for copies of letters. (Need to decide upon a board member to do this work with the development office.)	2019-2021 (Ongoing) Not able to track this at this time.

**Tactic #3 – Prepare for Muse teacher/advisor retirements and other transitions through succession planning and a new teacher/advisor mentoring program.**

Action	Responsible Party	Metric	Timing
<ul style="list-style-type: none"> <li>Identify a basic format for a school advisor succession plan based on recent work w/Circle of Friends schools. Materials include: binder with program documentation items such as financial materials, photos, fund-raising plan, critical information from Muse, etc.</li> </ul>	ED, secondary program manager and secondary scheduler	<ul style="list-style-type: none"> <li>Succession plan format identified.</li> <li>It is added to the Quick Start Guide on Muse website.</li> <li>It is addressed at Club Advisor Meeting.</li> </ul>	<p>Winter 2019</p> <p>We are behind on this task, but we have a wonderful example from DECA MS. Should be able to address part of this in the winter of 2020. The pandemic hit and Secondary Schools Program Director has met with CoF schools in FY21.</p>
<ul style="list-style-type: none"> <li>Conceptualize and outline a mentoring program led by Muse retired secondary school advisors. Mentoring program is focused on running successful clubs, especially building memberships, ticket sales, scheduling handling finances.</li> </ul>	ED, secondary program manager and secondary scheduler	Program plan outlined in early August.	<p>August 2019</p> <p>Because of the pandemic on hold through FY21.</p>
<ul style="list-style-type: none"> <li>Annually conduct an advisor survey to ascertain if current Muse advisors foresee any changes in their status as advisors or if they plan to retire in the next three to five years.</li> </ul>	Secondary schools program manager and scheduler	Survey conducted through Survey Monkey.	<p>In August as the new program year begins in 2018, 2019, &amp; the first two months of 2020 &amp; 2021.</p>
<ul style="list-style-type: none"> <li>Seek feedback for a basic mentoring plan from retired advisors who are interested in serving as mentors.</li> </ul>	Secondary schools program manager and scheduler	<p>Mentoring plan is reviewed by participating retired advisors.</p> <p>Currently, mentoring happens at CAMs and through ATTS.</p>	<p>October in each year of the strategic plan: 2018, 2019, 2020 &amp; 2021. On hold.</p>
<ul style="list-style-type: none"> <li>Create a succession plan for each school where an advisor has indicated a possible transition in his/her role as advisor or an impending retirement.</li> </ul>	Secondary program manager, and ED, as needed.	Succession plans are in place.	<p>December in each year of the strategic plan: 2019, 2020 &amp; 2021.</p>

<ul style="list-style-type: none"> <li>Present overview of mentoring program with the help of retired advisors and Muse staff at a Club Advisor Meeting (CAM).</li> </ul>	ED, secondary program manager and secondary scheduler	Presentation of mentoring program at February CAM.	On hold
<ul style="list-style-type: none"> <li>Muse hosts year-end wrap-up session for mentors and mentees.</li> </ul>	ED, secondary program manager and secondary scheduler	Wrap-up meeting is held.	On hold
<ul style="list-style-type: none"> <li>Muse secondary team (ED, program manager &amp; scheduler) review evaluation data on program and makes plans for the coming program year.</li> </ul>	ED, secondary program manager and secondary scheduler	Evaluation survey report is reviewed and program refined based on feedback.	On hold

### Organizational Capacity Plan

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July 1, 2018 – June 30, 2021

## **Strategic GOAL TWO**

Position Muse Machine programs for educational impact, vibrancy and sustainability.

### **Objective #3**

Establish a new Educator Excellence Endowment Fund for the Advanced Teacher Training Seminar (ATTS). (2018-2021)

### **Tactic #1 – Conduct ‘quiet phase’ for the Endowment Campaign for Educator Excellence.**

Action	Responsible Party(ies)	Metric(s)	Timing
<ul style="list-style-type: none"><li>Establish Teacher Excellence Endowment Campaign Steering Committee. (Campaign has two chairs: one for individual and business donations, and one for teacher donations).</li></ul>	Endowment campaign chairs, ED, development office and fiscal office	Steering committee in place.	2018 (Completed)
<ul style="list-style-type: none"><li>Conduct research to identify former teachers who have participated and benefited from Muse’s Advanced Teacher Training Seminar.</li></ul>	Endowment campaign chairs, ED, development office and fiscal office	Research underway for ATTS teachers from 1985-2013.	2018-2020 (Completed)
<ul style="list-style-type: none"><li>Prepare campaign materials: promotional hard copy materials, background paper, FAQs and short video on teacher professional development.</li></ul>	Endowment campaign chairs, ED, development office and fiscal office	Materials ready for use.	2018 (Completed)
<ul style="list-style-type: none"><li>In-house development materials—letters, thank-you notes, pledge cards, etc. are designed and produced.</li></ul>	Campaign chairs and development office	Materials ready for use.	2018 (Completed)
<ul style="list-style-type: none"><li>Host informational meetings with retired Muse teachers who participated in the Advanced Teacher Training Seminar to seek their advice</li></ul>	Endowment campaign chairs and development office	A series of meetings (est. 10-20) held.	2018-2019 (Completed)

and help.			
<ul style="list-style-type: none"> <li>Begin visiting with long-time Muse supporters (individuals and businesses) to gauge their interest in contributing to campaign.</li> </ul>	Campaign chair and ED	20-30 visits will be held.	2018-2019 (Ongoing)
<ul style="list-style-type: none"> <li>Host informational /celebratory gatherings as the campaign gathers momentum.</li> </ul>	Endowment campaign chairs, ED, development office	2-3 gatherings are held.	2019-2021 (Ongoing)
<ul style="list-style-type: none"> <li>Research, plan donor recognition plaques and wall in Muse offices. (Need to be built in a way that can be moved if Muse ever changes offices or moves.)</li> </ul>	Endowment campaign chairs, ED, development office	Design and build for display in 2020. (Donor name plaques can be added throughout the campaign.	2019-2021 Put on hold during pandemic because of new competing priorities.

**Tactic #2 – Conduct ‘public phase’ of the Teacher Excellence Endowment Campaign. Now, the Suzy Bassani ATTS Scholarship Fund**

Action	Responsible Party	Metric	Timing
<ul style="list-style-type: none"> <li>Plan for public phase kick-off, which begins when 50% to 60% of the final dollar goal is reached.</li> </ul>	Endowment campaign chairs and steering committee, ED, development office and fiscal office	50% to 60% of financial goal is reached and kick-off plan is in place.	Summer of 2019 We have a few ideas: small cocktail gathering where funders get their gold pins, hear an update, show video, etc. On hold because of pandemic.
<ul style="list-style-type: none"> <li>Prepare PR materials and activities for the kick-off event.</li> </ul>	Endowment campaign chairs and steering committee, ED, development office and marketing director	Materials and/or activities are ready.	Fall 2020 We have materials but we could consider personal letters or a segmented mail approach.
<ul style="list-style-type: none"> <li>Kick-off event is held.</li> </ul>	Endowment campaign	Celebratory event is held with	On hold

	chairs and steering committee, ED, development office and marketing director	PR/media materials in place.	
<ul style="list-style-type: none"> <li>Continue to meet with long-time Muse supporters (individuals and businesses) to secure financial support of the new endowment fund.</li> </ul>	Campaign chair for Muse supporter campaign, ED and development staff	Meetings continue.	2019-2021 (Underway)
<ul style="list-style-type: none"> <li>Continue to meet with retired Muse advisors who attended ATTS to secure their financial support of the new endowment fund.</li> </ul>	Campaign chair for teacher campaign, ED and development staff	Meetings continue.	2019-2021 Need stronger focus after we navigate some rather difficult challenges associated with the pandemic in 2020-21.
<ul style="list-style-type: none"> <li>Continue to host informational/celebratory gatherings as the campaign reaches critical junctures.</li> </ul>	Endowment campaign chairs, ED, development office	Gatherings are held for campaign contributors.	2019-2021 Underway but on hold for FY21.
<ul style="list-style-type: none"> <li>Plan for grand celebration at end of campaign when financial goal is met or exceeded.</li> </ul>	Endowment campaign chairs and steering committee, ED, development office and fiscal office	Grand celebration takes place.	2021 On hold for FY21.  We could start planning for a celebration in FY22 as part of the 40 <sup>th</sup> Anniversary (school year/fiscal year).

### Organizational Capacity Plan

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July 1, 2018 – June 30, 2021

## **Strategic GOAL TWO**

Position Muse Machine programs for educational impact, vibrancy and sustainability.

### **Objective #4**

Create long-term professional development plan for new and existing program artists working in the Preschool & Elementary Program to support new growth in programming and in schools participating in the program.

**Tactic #1 – Research exemplary teaching-artist training programs to serve as models for Muse Machine’s teaching-artist training program.**

Action	Responsible Party(ies)	Metric(s)	Timing
<ul style="list-style-type: none"><li>Interview National Assembly of State Arts Agencies, the Arts Education Partnership (Washington, D.C.), the Kennedy Center, Lincoln Center Institute, Arts Midwest, Cleveland Young Audiences, former staff members of the now closed Association for the Advancement of Arts Education (AAAE) of Cincinnati to ascertain characteristics of exemplary teaching-artist training programs from across the U.S.</li></ul>	ED, Carolyn Wheeler, and Muse board members (yet to be identified)	<ul style="list-style-type: none"><li>Interview questions devised.</li><li>Interviews are conducted w/interviewers keeping detailed notes.</li><li>Muse interview team members identify top three to five leading programs in rank order.</li></ul>	<p>2018-2020</p> <ul style="list-style-type: none"><li>Held Artist Training with Ping Chong + Company artists and 25 local artists and learned fundamentals on preparing for residencies.</li><li>In December 2019, Executive Director and Director of Preschool &amp; Elementary Program interview colleagues who have overseen artist training programs to collect ideas on critical</li></ul>

			components of such a program. <ul style="list-style-type: none"> <li>Have collected information from CALTech Training Program.</li> </ul>
<ul style="list-style-type: none"> <li>Conduct a literature search on characteristics of effective teaching-artist training programs.</li> </ul>	ED, evaluation consultant	Annotated literature search is completed.	2018-2019 Research completed.
<ul style="list-style-type: none"> <li>Create master list of top three to five teaching-artist training programs and interview key staff about lessons learned and the future direction of their programs.</li> </ul>	ED, Carolyn Wheeler, and Muse board members (yet to be identified)	Research completed with detailed notes on program.	2018-2019 Research completed.
<ul style="list-style-type: none"> <li>Outline the fundamentals of the Muse teaching-artist training program and develop related fundraising plan.</li> </ul>	ED, Carolyn Wheeler, preschool & elementary program director, development director	Basic case statement written to aid in fundraising effort and proposal writing.	2019-2020 On hold because of the pandemic and other priorities had to be addressed.
<ul style="list-style-type: none"> <li>Conduct research on organizations and foundations, including the National Endowment for the Art, which fund teaching-artist training programs, such as the Dayton Foundation, the Miriam Rosenthal Foundation, The Wallace Foundation, The Joyce Foundation, The Dana Foundation, The Kresge Foundation, Kenneth Rainin Foundation, etc.</li> </ul>	ED, Carolyn Wheeler, volunteers, and outside consultant	Annotated list of funders, who are most likely to fund Muse's new training program is prepared.	Mid-2019 On hold because of the pandemic and other priorities had to be addressed.

## **Tactic #2 – Implement fundraising plan for the most appropriate funders for teaching-artist training programs.**

Action	Responsible Party	Metric	Timing
<ul style="list-style-type: none"> <li>Implement fundraising plan with a focus on the</li> </ul>	ED and development	<ul style="list-style-type: none"> <li>Proposal writing is</li> </ul>	On hold because of the

most appropriate funders for the teaching-artist training programs.	director	underway.	pandemic and other priorities had to be addressed.
<ul style="list-style-type: none"> <li>Teaching-artist training program is mapped out in full detail for program staff to follow.</li> </ul>	ED, preschool & elementary program director, Muse staff and volunteers, outside consultants and artists	<ul style="list-style-type: none"> <li>Foundational support is secured.</li> <li>Curriculum finished.</li> <li>Presenters contribute to and are oriented to overall program design.</li> <li>Program logistics are mapped out.</li> <li>Final evaluation plan with metrics is in place.</li> </ul>	On hold because of the pandemic and other priorities had to be addressed.

### Organizational Capacity Plan

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July 1, 2018 – June 30, 2021

## **Strategic GOAL TWO**

Position Muse Machine programs for educational impact, vibrancy and sustainability.

### **Objective #5**

Expand workshop offerings for middle and high school students through partnerships with arts partners, area colleges and universities and the Dayton Metro Library.

**Tactic #1 – Establish a creative vision and program design for Muse member and community student workshops.**

Action	Responsible Party(ies)	Metric(s)	Timing
<ul style="list-style-type: none"><li>Develop an annual plan for creative workshops for Muse member students and other youth organizations, such as DayBreak, Dayton Metro Library Teen Group,</li></ul>	ED, student programs director, secondary program manager, secondary scheduler, Muse teachers/advisors, arts partners and the Dayton Metro Library and volunteers	<p>Annual plan is in place.</p> <ul style="list-style-type: none"><li>2018—Jess Godwin (songwriting), Thom Meyers (photography)</li><li>2019—Michael Bashaw (sculpture)</li><li>2020—Amedee Royer (Met HD Live—Opera) and Ping Chong + Company (performance of theater pieces)</li><li>2021 Amedee Royer (Met HD Live—Opera)</li><li>2021 Lion King Workshop</li><li>FY20-21 Programs with Dayton Metro Library</li></ul>	<p>2018-2021</p> <p>Underway</p>

<ul style="list-style-type: none"> <li>Negotiate with visiting artists (summer institute, in-school performances and special projects) to lead Muse master classes for students while they are in town.</li> </ul>	ED, student programs director	<ul style="list-style-type: none"> <li>Visiting artists are incorporated into the annual plan for creative workshops for students.</li> </ul>	2018-2019 <i>Four Feet Speak! artists led workshop for 25 students, ages 12-17</i>
<ul style="list-style-type: none"> <li>Incorporate new approaches for conducting artist residencies in local schools with diverse artists who participate in the summer institute and the Advanced Teacher Training Seminar to underscore and deepen student and teacher learning.</li> </ul>	Student programs director, Muse Creative Team, other resource providers	2019 to 2020 Ping Chong + Company artists are also part of: <ul style="list-style-type: none"> <li>Artist Training</li> <li>Two CAM meetings</li> <li>SI</li> </ul>	2018-2021 2019 Completed
<ul style="list-style-type: none"> <li>Continue to prepare student resource materials associated with preparing college application materials including high-quality video tapes that are required as part of the audition process to BFA programs at colleges and universities.</li> </ul>	Student programs director, Muse Creative Team and other resource providers	<ul style="list-style-type: none"> <li>Materials are created.</li> <li>Materials are added to Muse's website.</li> <li>Sample materials are collected and archived.</li> </ul>	2019-2021 <i>Director of Student Programs is working on this w/his creative team. But, at the moment, this is on hold</i>

### Organizational Capacity Plan

- What changes will the organization need to accomplish—including changes or additions to staff, additional fundraising, or other items—to fulfill its priorities?
- What additional support will the organization need to achieve its goals? Should it engage consultants, outside volunteer experts/advisors, or take other steps?

**Muse Machine**  
**Strategic Plan 2018-2021**  
*Setting the Stage for Sustainability*  
**Priority-Setting Handout**

July 1, 2018 – June 30, 2021

**Strategic GOAL THREE**

**Create a strong foundation for a long-term talent management plan (including succession planning).**

**Objective #1**

**Create, use and evaluate a new staff appraisal system based on HR best practices and Muse Machine's culture and needs.  
(2018-2021)**

**Tactic #1 – Roll out new staff performance appraisal process and refine overall annual system.**

Action	Responsible Party(ies)	Metric(s)	Timing
• Develop new staff appraisal system with staff input.	ED, development director, employees	Staff appraisal system is in place.	2018 (Completed)
• Conduct annual performance appraisals for full- and part-time employees.	ED and development director	Performance appraisals are completed annually by June 30th	2018-2021 (Ongoing)
• Ask for feedback on the new performance appraisal process at a staff meeting prior to implementing the system and following the appraisal process.	ED and employees	Gather feedback during first year of implementation and in subsequent years.	2018-2021 (Ongoing)
• Review position descriptions with each employee as part of their annual performance appraisal process and update them, as necessary.	ED and development director	Positions are reviewed and updated, as needed.	2018-2021 (Ongoing)

		<p>2018—tweaked the following position descriptions:</p> <ul style="list-style-type: none"> <li>• program manager</li> <li>• development associate</li> </ul> <p>2019</p> <ul style="list-style-type: none"> <li>• Approved expanded and updated PD for executive director</li> <li>• Created PD for office manager</li> <li>• Updated PD for finance director</li> </ul> <p>2020</p> <ul style="list-style-type: none"> <li>• Updated PD program manager</li> <li>• Created PD for secondary program director</li> </ul> <p>2021</p> <ul style="list-style-type: none"> <li>• Updated PD for development director</li> <li>• Updated PD for ED</li> </ul>	SD, DA, OM successfully completed their 90-day orientation plans.
<ul style="list-style-type: none"> <li>• Analyze staffing and/or contractor needs following annual performance appraisals and identify gaps in professional knowledge and expertise.</li> </ul>	ED, development director, finance director, staff	Gap analysis reviewed and action steps identified, if necessary.	2018-2021 (Underway)
<ul style="list-style-type: none"> <li>• Meet quarterly with full- and part-time employees to discuss progress toward annual goals and objectives.</li> </ul>	ED and development director (only staff with direct reports).	<ul style="list-style-type: none"> <li>• Quarterly meetings are incorporated into weekly meetings with individual staff member's weekly meetings.</li> <li>• Staff submit a brief update reports so the final appraisal data is captured over the 12-month period before the annual final appraisal review.</li> </ul>	2018-2021 (Underway)
<ul style="list-style-type: none"> <li>• Refine performance appraisal process based on annual feedback from reviewers and reviewees</li> </ul>	ED, development director, employees	Refine performance appraisal process, as necessary.	2018-2021 (Ongoing)



and new guidance from HR professional associations.			
<ul style="list-style-type: none"> <li>Identify leadership activities for staff who would like to assume larger roles and more responsibilities within the organization.</li> </ul>	ED, director of development	General plan is in place to develop staff for leadership roles within and outside of the organization.	2018-2021 (Underway)
<ul style="list-style-type: none"> <li>Identify and budget for professional development, which is aligned with strategic plan, for all employees.</li> </ul>	ED, development director and finance director	<ul style="list-style-type: none"> <li>Professional development should align with the goals and objectives in Muse's strategic plan and the long-term professional goals for the employee.</li> <li>During annual budget development process, set professional development budget.</li> </ul>	2018-2021 (Ongoing) 2020-2021 <ul style="list-style-type: none"> <li>ED participates in ongoing professional development. Development director participate in ongoing training for fundraising.</li> <li>Development associate participates on professional development.</li> <li>Leadership development for secondary program director in FY22 budget</li> </ul>

### **Organizational Capacity Plan**

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July 1, 2018 – June 30, 2021

### **Strategic GOAL THREE**

Create a strong foundation for a long-term talent management plan (including succession planning).

#### **Objective #2**

Develop succession plans for executive director and all director-level positions (director of development, director of student programs, director of preschool and elementary program). (2018-2021)

**Tactic #1 – Create work plans for Muse Machine administrative positions with performance objectives, tasks/activities, metrics and partners for annual business cycle.**

Action	Responsible Party(ies)	Metric(s)	Timing
<ul style="list-style-type: none"><li>Develop basic format for annual work plans and performance objectives for all employees as part of the new performance appraisal process.</li></ul>	ED, development director, board members w/HR backgrounds, employees	Format is in place.	2018 (Completed)
<ul style="list-style-type: none"><li>Each program has a detailed timeline for core activities that is reviewed and updated annually by respective program directors and their supervisors.</li></ul>	Employees in director-level positions	Timelines are in place and reviewed annually.	2018-2021 (Ongoing)
<ul style="list-style-type: none"><li>Identify at least one annual goal for process documentation within the annual appraisal process for the ED and director-level positions.</li></ul>	Board of Trustees, ED, development director	One annual performance goal is dedicated to process documentation, as identified by ED or development director in cooperation with employees.	2018-2021 (Ongoing)
<ul style="list-style-type: none"><li>Develop a format for a basic back-up plan to be used to address possible leaves of absence.</li></ul>	ED, development director, ad hoc personnel committee made-up primarily by	Format is in place.	2019 Need to address in early FY22.

	board members w/HR backgrounds		
<ul style="list-style-type: none"> <li>Begin drafting back-up plans for all director-level positions based on agreed upon format that is to be completed by program directors.</li> </ul>	ED, development director and ad hoc personnel committee made-up primarily by board members w/HR backgrounds	Back-up plans are in place.	2019-2020 Need to change for FY22. I
<ul style="list-style-type: none"> <li>Use aforementioned content and prior process documentation for the secondary schools program to begin outlining and developing an Operations Manual for Muse Machine that ensures core organizational processes are well-documented.</li> </ul>	ED and ad hoc personnel committee made-up primarily by board members w/HR backgrounds, independent contractor or volunteer	Operational Manual is in place in 2021, if not sooner. ON HOLD	<p>2019-2021 (Underway) Parts are underway—as a part of the Emergency Operations Plan and I have asked staff to keep a bulleted list of larger work tasks they handle by month.</p> <p>ED, DD, DA, OM, SD all have extensive documentation of processes. Beginning to move to a shared filing space.</p>

## Organizational Capacity Plan

- What changes will the organization need to accomplish—including changes or additions to staff, additional fundraising, or other items—to fulfill its priorities?
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July 1, 2018 – June 30, 2021

### **Strategic GOAL THREE**

Create a strong foundation for a long-term talent management plan (including succession planning).

#### **Objective #3**

Outline knowledge transfer plans for director-level positions, including: job shadowing, video interviews, process documentation and, in some cases, filming program directors in action.

**Tactic #1 – Complement succession plans for executive director and director-level positions with resources to aid knowledge transfer.**

Action	Responsible Party(ies)	Metric(s)	Timing
<ul style="list-style-type: none"><li>Annually review process documentation resources for clarity, detail, ease of replication. (Ask: is the process documentation logical, efficient, relevant, and necessary?)</li></ul>	ED, development director, supporting staff and/or contractors director, supporting staff and/or contractors	<ul style="list-style-type: none"><li>Current process documentation (i.e., summer institute, advanced teacher training seminar, benefit dinner, accepting gifts) is reviewed by responsible staff and updated and expanded annually.</li><li>New areas for process documentation will be identified annually and will part of the staff goal-setting process.</li></ul>	<p>Current documentation, 2018-2021 (Underway)</p> <ul style="list-style-type: none"><li>Development associate has built upon prior work for development as well as drafted new documentation on the grant development process.</li><li>Former &amp; current</li></ul>

program manager

- maintained and added to documentation secondary programs.
- ED, develop. director and preschool and elementary director have been documenting residency activities.
- Board orientation materials were more fully developed in 2018 and 2019.
- Automated budget reports for all dept heads.
- Internal controls for finance greatly improved and recognized by audit team.
- Finance has a strong set of process

			<p>materials including: annual budgeting, procedures, instructions regarding DF and policy development is underway to be completed by June 30, 2021.</p> <ul style="list-style-type: none"> <li>• Annual budgeting defined and documented. Staff understand and fully participate in budget process and use accounting codes diligently.</li> </ul>
<ul style="list-style-type: none"> <li>• To ensure continuity and stability, members of Muse Machine's executive committee are prepared to assume aspects of the executive director's position in the event she is absent (e.g., vacation, illness, family leave, etc.).</li> </ul>	ED and executive committee	<p>Executive committee develops a set of basic procedures for assuming ED's role if she is absent.</p> <p>Key roles:</p> <ul style="list-style-type: none"> <li>• Authorizations—checks, leaves, contracts, expenditures</li> </ul>	<p>2019 We need to work on this.</p> <p>Some of this should be addressed by executive committee. And OM is working to</p>



		<ul style="list-style-type: none"> <li>Risk and legal matters w/Coolidge Wall Co. L.P.A</li> </ul>	<p>ensure staff used PR and accounting codes consistently.</p> <p>The new Finance Policy will address some of this.</p>
<ul style="list-style-type: none"> <li>Begin to consider the ways in which two staff can be trained to cover aspects of a director's area, if they are absent for any reason. (This action is predicated on getting more process documentation completed and in place.)</li> </ul>	ED and staff (employees and contractors)	Staff will identify major work areas they could assist with if the ED, directors and other colleagues are absent.	2019 to present—knowledge transfer from ED and DD to OM—assists board leadership tasks, understands corporate, personnel & fund agreements filing systems and where to find documents, etc.
<ul style="list-style-type: none"> <li>Develop script for video interviews re major areas of work and responsibilities.</li> </ul>	ED, development director, board members w/HR backgrounds, employees	<p>Questions for interviews will be in place:</p> <ol style="list-style-type: none"> <li>Preschool &amp; Elementary, 2019</li> <li>Development, 2019</li> <li>Executive Director, 2020</li> <li>Student Programs, 2020</li> <li>Secondary School Programs, 2021</li> </ol>	<p>2019-2021</p> <p>ON HOLD</p>
<ul style="list-style-type: none"> <li>Set appropriate times to video-interview ED, development director, and program directors (Need to avoid 'crunch' times around musical, summer programs and fund-raising periods of time).</li> </ul>	ED, development director, board members w/HR backgrounds, employees	<p>Interviews are scheduled.</p> <ol style="list-style-type: none"> <li>Preschool &amp; Elementary, 2020</li> <li>Development, 2020</li> <li>Executive Director, 2021</li> <li>Student Programs, 2021</li> <li>Secondary School Programs, 2022</li> </ol>	<p>2020-2021</p> <p>ON HOLD</p>

<ul style="list-style-type: none"> <li>Begin filming directors in action: auditions, during musical and summer program, in schools, during school planning sessions and culminating performances, etc.</li> </ul>	ED, preschool and elementary program director, student programs director, contract videographer	Schedule for filming will be developed.	<b>ON HOLD</b>
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### Organizational Capacity Plan

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# Muse Machine Strategic Plan 2018-2020 Priority-Setting Handout

**July 1, 2018 – June 30, 2021 – UPDATED March 17, 2021, for Strategic Planning Meeting via Zoom**

## Strategic Goal Five

**DRIVE THE GROWTH OF MUSE MACHINE'S UNRESTRICTED INDIVIDUAL GIVING (TO INCLUDE MUSEMAKER ANNUAL CAMPAIGN) 10% PER ANNUM -- AND ENSURE THE DEVELOPMENT AND MAINTENANCE OF A ROBUST PIPELINE OF GIVING FOR THE FUTURE**

### Objective # 1

**Achieve key financial goals—i.e., 10% per year increase in unrestricted individual giving; maintain consistent grants revenues and grow sponsorships; etc. to fund increasing musical expenses.**

### **Tactic #1 – Increase unrestricted annual giving (including MuseMaker) 10% per annum.**

Action	Responsible Party(ies)	Metric(s)	Timing
<ul style="list-style-type: none"> <li>Identify new musical sponsors to help offset rising production costs.</li> </ul>	Dir of Devel, BoT, Devel Cmte and others	Secure new musical sponsors/year totaling minimum \$25,000. <ul style="list-style-type: none"> <li>Secured \$7,900 as shown immediately right from 6 new sponsors.</li> <li>Added Social &amp; Show event (Friday of musical weekend)—resulted in \$3,500 musical tickets revenue transferred.</li> <li>Total \$11.4K increase.</li> </ul>	Annually by October 1 (underway) 6 new sponsors for 2019 Musical (Dayton Rotary, Production Tube Cutting, Martha & Dale Shields, Pickrel Shaeffer Ebeling, Thompson Hine, Verso); Nippert prospect for 2021. <b>Secured an add'l \$11K in sponsorships for 2020</b> <b>FY20-21 no musical in Jan '21; will get funder permission to carry over to FY22</b>
<ul style="list-style-type: none"> <li>Maintain grants/sponsorship funding.</li> </ul>	Internal Devel Team	Do not exceed 35% of budget (now @ 34%)	Underway – ongoing through 2021 and beyond

			<p>At 33% as of 6/30/19.  <b>At ~33% as of 5/8/20</b>  <b>FY20-21 We did secure most of our funding for teacher professional development and PreK-Elementary and Secondary for some virtual programming; some funders adopted a wait &amp; see posture due to the pandemic; no musical in Jan '21; will get funder permission to carry over to FY22</b></p>
<ul style="list-style-type: none"> <li>• Increase and retain unrestricted individual donor giving now at approx. 12% of total budget.</li> <li>*Capture new musical ticket buyers from Ticket Center Stage list, add to database, and market to them.</li> <li>*Call and/or mail LYBUNT/SYBUNT donors.</li> <li>*Make personal calls or send notes to each new fiscal year's donors (development committee did this for FY18 these numbered 57).</li> </ul>	Dir of Devel, BoT, Devel Cmte	Grow to 24% from approximately 12% (as of 12/18); target 45% retention rate per benchmarking standard.	<p>Quarterly/ongoing beginning Q3 FY19</p> <ul style="list-style-type: none"> <li>• Unrestricted individual giving at 13% as of 6/30/19</li> <li>• Of 57 new FY18 donors, 17 gave again in FY19 (Dev. Cmte. Members sent personal notes).</li> <li>• Plan a LYBUNT / SYBUNT survey and/or letter to be done Oct. 2019.</li> <li>• Have Devel Cmte or BoT Chair write personal note to new donors within 30 days of 1<sup>st</sup> gift</li> <li>• Include "New Donor" welcome materials w/ initial Muse TY letter (tbd) including "how to stay involved with Muse."</li> <li>• <b>MuseMaker running 20+% ahead of FY19 to date</b></li> </ul>

			<b>Total FY20 unrestricted giving is at 10.7% of total budget; MuseMaker at Feb. 2021 is ahead of FY20 by \$10K.</b>
<ul style="list-style-type: none"> <li>• Increase monthly donors toward increasing overall individual giving:</li> <li>*Make them 'select' with a special group name.</li> <li>*Sponsor a contest or promotion to generate more of them.</li> <li>*Customize their monthly thank-you letter.</li> </ul>	Internal Devel Team	Add 20 new monthly donors per fiscal year	<p>Establish 6/30/18 baseline and report 6/30 each year thereafter</p> <p>Currently have 3 monthly donors; targeting a campaign contest as part of Nov. MuseMaker to add more monthly donors.</p> <p>Have added an add'l 3-5 monthly donors since last update</p> <p><b>Currently at 7 monthly donors as of 3/21.</b></p>
<ul style="list-style-type: none"> <li>• Market annual musical memory books as a revenue generator @ \$40 to \$50 retail cost.</li> </ul>	Internal Devel Team	Field test w/ <i>Mamma Mia!</i> after the musical wraps; show <i>Hello, Dolly!</i> book to take orders; target 30 books	<p>Annually</p> <p>On hold for now due to transition of Devel Assc.</p> <p>In discussion of this with Doug Merk</p> <p><b>Will offer these in FY22 when there is a musical.</b></p>

## **Objective # 2**

**Increase individual reach and engagement through traditional and social media campaigns; strategic segmentation of appeals; and attention to and involvement of alumni and other key stakeholder groups.**

### **Tactic #1 – Grow and refine donor reach and database.**

Action	Responsible Party(ies)	Metric(s)	Timing
<ul style="list-style-type: none"> <li>• Increase database contacts by 200 names each year (avg 10 per trustee, i.d. names from DBJ articles, staff each add 5-10, names from alumni and parents, and other sources (e.g., program</li> </ul>	BoT, parents, alumni, staff, media sources	Report from Devel Assc showing baseline and annual changes	<p>Each year-end—June 30</p> <ul style="list-style-type: none"> <li>• Underway; BoT chair to ask trustees for names Sep. '19.</li> <li>• Created an Excel list from</li> </ul>

booklets from other cultural/arts events)			<p>one source, not yet deduped against Salsa--# of additions TBD.</p> <p><b>Between FY20 &amp; FY21 to date, added 896 names</b></p>
<ul style="list-style-type: none"> <li>Continue to ensure all Muse members and parents are tracked, thanked, educated about Muse, encouraged to donate and involved/engaged.</li> </ul>	All staff / BoT	Track/report all activities related (annual TY cards to parents, educational sessions for parents at annual ticket buying session [see below], Muse Minutes, newsletters, and all other communication; track parent giving)	<p>Report on this in a Section in annual report each year</p> <ul style="list-style-type: none"> <li>ED sent congratulatory cards to all Muse graduating H.S. seniors. FY18 &amp; FY19</li> <li>Holiday TY cards w/ cast photo sent to all parents of Mamma Mia! cast/crew.</li> <li>Muse website has an alumni page encouraging them to complete linked survey/contact form to stay in touch.</li> <li><b>Ongoing activities</b></li> <li><b>FY20 on-hold due to pandemic; FY21 no musical.</b></li> </ul>
<b>Tactic # 2 – Identify and cleanse data related to key stakeholder groups.</b>			
Action	Responsible Party(ies)	Metric(s)	Timing
<ul style="list-style-type: none"> <li>Identify key stakeholder segments for future development efforts (alumni, parents, emeritus BoT, legacy group, corporate sponsors, etc.).</li> </ul>	Muse Devel Team & Devel Cmte	Create a manageable and meaningful list of segments	<p>Most are identified; ensure clean data by May 31, 2019; report numbers annually at year-end.</p> <p>As new Devel Assc continues to cleanse data, this effort is ongoing.</p> <p><b>Great improvements in this regard</b></p> <p><b>Based on review session with Kunal Swani, the plan is to further segment</b></p>

			<p>donors to reduce MuseMaker mailing costs/raise ROI and convert 1<sup>st</sup> time donors to monthly or annual giver category.</p>
<ul style="list-style-type: none"> <li>Analyze key stakeholder groups, numbers of each, giving patterns, average gift, frequency of gifts, etc. To be done with an eye toward customization/personalization of meaningful stories related to each and relationship-building.</li> </ul>	<p>Devel Assc, Devel Cmte, ED</p>	<p>Meaningful and detailed reports related to each identified segment</p>	<p>Ongoing through June 2019-2021 (set dates w/ Devel Assc)</p> <ul style="list-style-type: none"> <li>MuseMaker direct mail pieces are analyzed for a number of factors, including ROI, avg. and median gifts, response rate, etc.</li> <li>New Devel Assc is clarifying coding ongoing.</li> <li>Devel Assc is creating a database process manual.</li> <li><b>Devel Assc continues to document processes; data much cleaner and in consistent formatting; developing segment scorecards/visuals</b></li> <li><b>Dashboard underway will include: retention rate, conversion rate for new donors into repeat donors, average gift amount, etc.</b></li> <li><b>Developing standardization to streamline and prioritize current segmentation groups in order of importance.</b></li> </ul>

			<ul style="list-style-type: none"> <li>• <b>Begin working through segmentation groups to determine if active or adjust segmentation if needed.</b></li> <li>• <b>Define when a constituent becomes inactive.</b></li> </ul>
<ul style="list-style-type: none"> <li>• Experiment with and monitor various messaging and storytelling via multiple media (email, mail, social media, etc.) to specific stakeholder segments.</li> </ul>	Devel Assc, Devel Cmte, ED	Different segment each quarter	<p>July 2019-June 2020 (set dates for each group)</p> <ul style="list-style-type: none"> <li>• Messaging/storytelling has been done w/r to teachers for the endowment campaign via letter, MuseMinute, video.</li> <li>• New donors (as noted previously) will get special first time TY packet.</li> <li>• Repeat annual donors will receive a special TY w/ gift—e.g., I LOVE MUSE magnet.</li> <li>• Monthly donors get special customized letters.</li> <li>• <b>Met w/ Kunal and WSU mktg. students and gathered ideas</b></li> <li>• <b>Changed our messaging to be relevant to the pandemic—teachers as essential workers featured in a MuseMaker edition; Oregon Printing commented on uniqueness of Muse messaging being upbeat; Changed DONATE page to sync w/ MuseMaker—</b></li> </ul>



			i.e., repeat photo and key message; at onset of pandemic, uploaded Muse Together features to maintain stakeholder connection; other updates to DONATE page—cleaner; more user-friendly and ties to Salsa Engage module.
<ul style="list-style-type: none"> <li>Continue to evaluate current donor CRM software with regard to ability to provide organization-wide needs such as membership tracking and billing.</li> </ul>	Devel Assc, Fin Dir	Maintain list of pros/cons and alternatives to consider	<p>Underway and ongoing thru 2021</p> <p>Devel Assc is tracking all identified shortcomings w/ current donor software.</p> <p>Continue to document shortcomings and have preliminarily looked at Salesforce for NPs and one other system.</p> <p>On-hold due to other technology priorities; e.g., automated budget reports.</p> <p>On hold due to pandemic and competing priorities.</p>
<b>Tactic # 3 – Educate and engage stakeholder segments.</b>			
Action	Responsible Party(ies)	Metric(s)	Timing
<ul style="list-style-type: none"> <li>Hold brief information sessions during parents' musical ticket purchasing sessions early Nov. to educate parents re: breadth/depth of Muse programming.</li> </ul>	Dir Devel	# of parents who attend sessions (I will provide brief intro session for all who attend; available to meet with small groups as needed after)	<p>Each November; done 11/10/18</p> <p>Completed 11/18; to be done again 11/19; provide updates to parents re: Amazon Prime, Kroger and DLM programs to benefit Muse Machine.</p> <p><b>DONE</b></p>

<ul style="list-style-type: none"> <li>Engage parents in employer-matching programs, identifying employers are potential sponsors or in-kind donors, etc.</li> </ul>	Dir Devel and Parent Assn leadership	# of responses	<b>NA for Fall 20-no musical</b> Start in FY 2020 Mentioned employer matching programs at 11/18 parent session.
<ul style="list-style-type: none"> <li>Create and implement a quarterly Muse “notes” short email to alumni only.</li> </ul>	Dir Devel, ED, Devel Assc	Monitor # of emails opened and read	Begin Q4 FY19 or Q1 FY20 Muse website alumni page and survey form noted above.
<ul style="list-style-type: none"> <li>Create/distribute development newsletter (donor recognition/profiles, engagement) (ideas include donor and their favorite program/corporation and a school/Circle of Friends, etc.).</li> </ul>	Dir Devel, ED, Devel Assc	2 per year	Feb-Mar and Aug-Sep Delayed due to staff transition; planning a Nov. 19 one-page donor online ‘newsletter’ to introduce program managers/directors and spotlight a donor. <b>Meeting w/ Doug M &amp; MCZ next week</b> <b>Doug Merk has just created the first newsletter in four years to drop late March 2021; to include comprehensive donor recognition to take the place of a musical program.</b>

### **Objective # 3**

**Examine the quality and effectiveness of Muse’s donor relations and stewardship activities and policies that foster long-term engagement and investment in the organization, such as planned giving, donor recognition, donor profiles, recognition and engagement events/opportunities, etc.**

### **Tactic # 1 – Initiate planned and major giving efforts (foster long-term engagement and investment in Muse).**

Action	Responsible Party	Metric	Timing
<ul style="list-style-type: none"> <li>Identify planned giving best practices (conduct research) and understand what was done in the past</li> </ul>	Dir Devel & Devel Cmte	2-3 conduct research, compare notes and recommend approach	Nov 2018 – March 2019 Moved to 2020; asked Devel Cmte member to bullet best

			practices re: planned giving for Muse's consideration. <b>Eli Sperry to work with MCZ &amp; RMC</b> <b>Rosalie taking a 2.5 hour related webinar March 22-26, 2021</b>
<ul style="list-style-type: none"> <li>Identify subtle ways to begin to seek planned giving (messaging on MuseMakers, website, etc.)</li> </ul>	Muse Devel Team & Devel Cmte	Monitor and report results	Begin late 2018 and continue through 2021 Beginning late '19, will add planned giving 'ask' to MuseMaker coupons and to Devel Dir email signature block and website DONATE section. <b>Need plan</b>
<ul style="list-style-type: none"> <li>Identify a major gifts plan for strategic long-term goals</li> </ul>			Q4 calendar 2019 Move to 2020-21 after ATTS endowment campaign close to ending.

**Tactic # 2 – Continuously recognize musical honorees, donors and alumni. Doug M tied up with virtual programming; will address this Spring.**

Action	Responsible Party	Metric	Timing
<ul style="list-style-type: none"> <li>Create a musical honoree page on website, highlighting current year's honoree, while noting all previous ones</li> </ul>	Internal Devel Team and Marketing Dir	Page gets loaded and goes live	Go live March 2019 Push to 2020 musical honoree; model page after existing website style. <b>To be discussed next week</b> <b>DONE On ARCHIVE page at</b> <b>www.musemachine.com</b>
<ul style="list-style-type: none"> <li>Create a notable alumni page on website, highlighting achievements of those who opt in to participate (both arts and non-arts careers) – What Muse Did For Me! Use STORYTELLING</li> </ul>	Internal Devel Team and Marketing Dir	Minimum of 10 alumni initially, both arts and non-arts careers, with geographic range	Go live April 2019 Move to April 2020; focus on donor spotlight initially. <b>TBD</b>

<ul style="list-style-type: none"> <li>Keep up with career milestones of successful alumni and celebrate in a timely manner via social media (e.g., opening night on B'way; awards; business launch; job changes; etc.)</li> </ul>	Muse Devel Team	TBD	TBD
<ul style="list-style-type: none"> <li>Highlight donors in development newsletter (see Objective 2, Tactic 3)</li> </ul>	Muse Devel Team and Marketing Dir		Use Muse Minute (email) format to address this. Salsa donor software can be used.
<b>Tactic # 3 – Achieve Endowment for Educator Excellence Campaign Goals – see Strategic Plan Goal # 2 Objective 3 for details</b>			
Action	Responsible Party	Metric	Timing
<ul style="list-style-type: none"> <li>Reach 60% of \$675K</li> </ul>	Co-chairs and cmte	~\$335-340K achieved	Dec 2018 Achieved as of FY19 end.
<ul style="list-style-type: none"> <li>Reach 100% of \$675K</li> </ul>	Co-chairs and cmte	Target achieved	Dec 2019 Target moved to Dec. 2020 <b>\$100K to be raised</b> <b>Will provide oral update to S.P. committee</b>
<b>Tactic # 4 – Ensure quality and consistency of development/fundraising policies and procedures with Muse strategic plan and culture and best practices.</b>			
Action	Responsible Party	Metric	Timing
<ul style="list-style-type: none"> <li>Create a Records Retention Policy for Fundraising and Development paperwork</li> <li>Create a Donor Privacy Policy</li> <li>Review all other relevant policies annually               <ul style="list-style-type: none"> <li>Gift Acceptance Policy</li> <li>Ethics Policy</li> <li>Confidentiality/Conflict of Interest</li> </ul> </li> </ul>	Devel Cmte, BoT Governance Cmte	Complete annual checklist	Complete a new Investment Policy by April 2019 <b>DONE</b> Review all policies annually (August?) Governance or to-be-formed Audit Cmte to handle annually. <b>TO BE DONE</b> <b>Gift Acceptance Policy in process for updates to tie to coming Finance Policy; Comprehensive Records Retention/Destruction Policy underway.</b>

• Research best practices related to relevant policies.	Dir Dev, ED	Check-in with each other	Annually
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#### **Objective # 4**

**Restore Muse's ad hoc Events Committee to provide year-round guidance and assistance to identify, plan and execute special events.**

#### **Tactic #1 – Host Annual “Social & Show” (targeting young professionals)**

Action	Responsible Party	Metric	Timing
<ul style="list-style-type: none"> <li>• Host a pre-musical cocktail reception (@ Table 33) on 1/12/19 (max. 50 guests)               <ul style="list-style-type: none"> <li>a) Create PR piece to promote event</li> <li>b) Identify guests to attend pre-musical cocktail reception prior to evening performance</li> <li>c) Prepare suggested invitation/communication</li> <li>d) Provide new contacts' info to Muse development.</li> </ul> </li> </ul>	Muse Devel Team & BD Cmte with social lead volunteer(s)	Affordable and achievable via sponsorship(s) At least breakeven (to promote Muse to new audience of young professionals) but target is \$5K for musical	Underway for 1/12/19 <b>Successfully completed; netted \$7K profits; 15# new sponsors and 70+ guests.</b> <b>2<sup>nd</sup> event successful w/ new sponsors and guests and many returning</b> <b>Due to pandemic, the renamed Special Events Cmte worked with Doug M. &amp; Rosalie to hold INSIDE THE MUSE STUDIO virtual sessions; two done; two to go; net ~\$20K, exceeded goal of \$15K target for five small events.</b>

#### **Tactic # 2 – Host summer concert-related social events**

Action	Responsible Party	Metric	Timing
• Plan for summer concert-related social event(s)	Muse Devel Team & event	Affordable and achievable	Mar 2019-Aug 2019

<ul style="list-style-type: none"> <li>a) Prepare event budget</li> <li>b) Do event planning (logistics, etc.)</li> <li>c) Identify guest list</li> <li>d) Create invitations/communications</li> <li>e) Send invitations</li> <li>f) Report RSVPs</li> <li>g) Hold event</li> </ul>	volunteers	with a target profit amount TBD	No summer concert in '19; Survival Guide to a Career in the Arts being worked on by creative team; summer concert to be held Aug. 2020 <b>2020 Summer Concert cancelled due to pandemic.</b>
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### **Tactic # 3 – Plan and execute annual benefit dinner (related to musical)**

Action	Responsible Party	Metric	Timing
<ul style="list-style-type: none"> <li>• Follow detailed benefit dinner timeline already established</li> </ul>	BD Cmte, Dir Dev, Devel Assc, ED		Sep-Jan annually Committee and committee leadership being confirmed late Aug/early Sep 2019; 1 <sup>st</sup> cmte mtg to be in Sep. Beginning earlier planning for 2021 BD w/ 5/11 zoom mtg. Co-leaders identified. <b>2021 BD cancelled due to pandemic.</b>

### **Tactic # 3 – Restore Muse ad hoc Special Events Committee**

Action	Responsible Party	Metric	Timing
<ul style="list-style-type: none"> <li>• Restore a Muse ad hoc Special Events Committee to provide year-round guidance and help for all events</li> </ul>	ED, Dir Dev, Devel Assc	Secure 7-11 members	By May 2019 On hold; requires a board discussion. Special events cmte identified; Committee description revised <b>See above</b>

### **Objective # 5**

**Assess and enhance digital and other marketing strategies, tactics, tools and practices. (2018-2021).**

**Tactic #1 – Assess effectiveness and efficiency of current Muse Machine marketing strategies, tactics, tools and practices.**

Action	Responsible Party(ies)	Metric(s)	Timing
<ul style="list-style-type: none"> <li>Inventory and document samples of all existing Muse Machine marketing strategies, tactics, tools and practices</li> </ul>	Dir Dev, Devel Assc, Dir Mktg	Gather all messaging for past 6-12 months	End of January 2019 Completed; received high praise from and worked w/ Kunal Swani's WSU marketing classes; # of groups presented recommendations on 4/30/19. Will be seeking regular counsel/advice from Kunal on at least a quarterly basis.
<ul style="list-style-type: none"> <li>Meet for initial assessment of Muse marketing practices (website, newsletters, MuseMaker)</li> </ul>	ED, Dir Dev, Kunal Swani, Dir Mktg	Gather initial observations of current practices and ideas for future.	Done
<ul style="list-style-type: none"> <li>Develop a spring project for WSU graduate marketing students (i.e., website analytics and audit of all messaging from past 6-12 months)</li> </ul>	ED, Dir Dev, Kunal Swani, Dir Mktg	TBD – something practical and inexpensive that Muse can implement and find benefit	Set for Nov 2018 and annually thereafter On Hold
<ul style="list-style-type: none"> <li>Identify ways to engage various Muse segments (i.e., alumni, parents, students, other individual donors) electronically via social media</li> </ul>	ED, Dir Dev, Devel Assc, WSU Mktg, Dir Mktg		2019-2020 <ul style="list-style-type: none"> <li>School program leaders will encourage teachers to form a Muse Pinterest site to share ideas (recommendation from WSU students).</li> <li>Learned there is a parent musical FB page each year?</li> </ul> MUSE TOGETHER implemented since onset of pandemic; Lippert posts Preschool/Elementary activities and photos nearly daily; Emily uses social media effectively in various ways to reach teachers;

			etc.
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